



# TEXPROCIL

THE COTTON TEXTILES EXPORT PROMOTION COUNCIL



## NEWSLETTER

Volume VIII. Issue No. 12 | 25 July, 2025

Indian Cottons,  
Global Reach!



A Fortnightly Publication of THE COTTON TEXTILES EXPORT PROMOTION COUNCIL OF INDIA

### Union Minister, Shri. Shivraj Chouhan chaired high-level meet on cotton crisis in Coimbatore



Mr. Ravi Sam, Vice Chairman, TEXPROCIL and Mr. T. Rajkumar Past Chairman, CITI met the Hon'ble Union Minister of Agriculture, Shri Shivraj Singh Chouhan, on 11<sup>th</sup> July 2025 in Coimbatore and submitted a memorandum seeking the removal of the 11% import duty on cotton.

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Strategic Opportunity

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## Editorial



**Dr. Siddhartha Rajagopal**  
Executive Director  
TEXPROCIL

## Dear Reader,

With the August 1, 2025 deadline fast approaching for the imposition of a reciprocal tariff of up to 26–27% by the United States on imports of Indian textiles and apparel, exporters are grappling with heightened uncertainty and the real risk of market disruption. The industry is in a wait and watch mode. India's trade negotiators are already vigorously pursuing a temporary exemption or a sector-specific carve-out for textiles and apparel during the ongoing discussions with U.S. counterparts.

Focusing specifically on cotton textiles, which fall under the purview of this Council, the sector stands at a critical juncture amidst evolving global trade dynamics and mounting supply chain pressures. Addressing the current challenges requires a comprehensive overhaul of the cotton textile value chain, with a renewed emphasis on sustainability, innovation, and international quality standards.

It was against this backdrop that the Hon'ble Union Minister of Agriculture, Shri Shivraj Singh Chouhan, engaged with stakeholders in textile sector on July 11, 2025, in Coimbatore. A report on this important interaction attended by TEXPROCIL Vice

Chairman, Mr. Ravi Sam, and CITI Past Chairman, Mr. T. Rajkumar-is featured in the 'Trade Promotion' Column of this issue.

The 'Trade Promotion' Column also includes a report on the Council's participation at the Intex South Asia Show, held in Dhaka, Bangladesh from June 25-27, 2025, organized by Worldex Exhibitions. The event served as an important platform for member exporters to explore new market opportunities in South Asia.

To empower member exporters in leveraging the potential of digital platforms, TEXPROCIL organized a webinar in collaboration with Amazon Global Selling on July 25, 2025, titled "E-Commerce Exports through Amazon Global Selling". A detailed report on this initiative is featured in the 'Trade Facilitation' Column, highlighting the increasing interest of member companies in expanding their reach through e-commerce exports.

The 'Expert Speaks' Column in this edition presents an insightful article by Mr. Eric Trachtenberg, Executive Director of the International Cotton Advisory Committee (ICAC), titled "Investing in Cotton Textiles: A Strategic Opportunity". In his piece, Mr. Trachtenberg shares his expert views on the long-term value of investing in cotton textiles, particularly in emerging markets.

A special 'Country Report' on France is also included, analyzing opportunities for Indian textile and apparel exports and offering actionable insights for exporters aiming to deepen their presence in the EU market.

In the 'Special Feature' Section, we present a report on the Council's meeting with Ms. Alison Ward, CEO of CottonConnect, along with Mr. Kinnar Lakhani and Mr. Selvin, held on July 10, 2025 at the TEXPROCIL Head Office in Mumbai. The meeting focused on a potential collaboration

with CottonConnect as a Training Channel Partner under the "Kasturi Cotton Bharat" Branding initiative being implemented by the Council.

Finally, our 'Policy Talks' Section covers key policy changes, updates to the Foreign Trade Policy, and recent government notifications on incentive schemes, tax procedures, and trade facilitation measures of relevance to the industry.

We hope you find this edition of the TEXPROCIL E-Newsletter informative and relevant. We welcome your valuable feedback and invite contributions in the form of short articles or insights on issues concerning trade and industry.

We thank our readers for their continued support and look forward to working together to advance the interests of India's textile export community.

**:: TEXPROCIL::**

## TEXPROCIL - The International face of Indian Cotton textiles !



### TEXPROCIL - Grievance Redressal Cell

For representing Procedural / Policy issues with various Govt. Authorities and Redressal of Complaints / Trade Disputes against Buyers/ Suppliers with Indian Missions Abroad/ Foreign Missions in India, you may kindly write to us at [sybil@texprocil.org](mailto:sybil@texprocil.org) and [annie@texprocil.org](mailto:annie@texprocil.org)



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## Chairman's Page



**Vijay Agarwal**  
Chairman  
TEXPROCIL

performance to improve in the 3rd and 4th quarter of the current fiscal.

On the trade negotiation front, India is progressing toward a trade deal with the US to reduce tariffs. The Trade and Economic Partnership Agreement (TEPA) with EFTA countries—which comprises Iceland, Liechtenstein, Norway, and Switzerland—is set to be implemented from October 2025, promises US\$100 billion in investment and one million new jobs. Switzerland has ratified the pact, finalizing EFTA's endorsement. We see good opportunity for Home Textiles and Apparel in markets like Norway and Switzerland.

The India-UK FTA is a landmark achievement which assures growth in exports of Home Textiles and Apparel on account of zero duty. The negotiators under the visionary guidance of the Hon'ble Commerce and Industry Minister Shri Piyush Goyal, have fulfilled a long-standing demand for zero duty on textile and clothing imports from India thereby bringing it on par with our competitors viz. Bangladesh, Pakistan, Turkey,

## Dear Friends,

India's cotton textiles sector is navigating a pivotal moment amid shifting global trade dynamics and emerging supply chain pressures. While India remains a leading cotton producer, a continuing reliance on imports of contamination-free cotton is growing, straining foreign exchange reserves and exposing weaknesses in the domestic value chain. To address this imbalance, there is an urgent need to revamp India's cotton ecosystem—from farming practices to supply chain efficiency—with a focus on quality, sustainability, and innovation.

Recent export data from April to June 2025 shows a decline in exports of cotton yarn, fabrics, and textile products. A growth of 8.91% registered in apparel exports, led to an overall 1.92% rise in textiles and apparel exports. However, we expect the

Vietnam, etc. The trade and industry looks forward to an early conclusion of India-EU FTA on the lines of India-UK FTA.

With 13 active FTAs and several under negotiation, India's exporters remain optimistic about the transformative potential of upcoming trade agreements.

In this context, TEXPROCIL has remained steadfast and proactive, advocating for the interests of Indian exporters through policy engagement, trade facilitation, digital transformation initiatives, and branding efforts. We are fully committed to enabling our members to not only respond to change but to shape it—to lead rather than follow.

### Visit to Japan

With Japan's textile imports exceeding USD 30 billion, India's modest 1.2% share highlights substantial untapped potential—particularly in the home textiles and made-ups segments.

To deepen trade ties and explore new opportunities, an official delegation led by Hon'ble Union Minister of Textiles, Shri Giriraj Singh, visited Japan from

14–15 July 2025. I had the privilege of accompanying the delegation alongside Shri Rohit Kansal, Additional Secretary, Ministry of Textiles.

At an interactive session, H.E. Shri Sibi George, India's Ambassador to Japan, delivered the opening remarks, followed by a detailed policy presentation by Shri Rohit Kansal. Key meetings were held with leading companies including Fast Retailing, Daiso, YKK, and Asahi Kasei. Discussions centred on enhancing sourcing from India, encouraging investment, and boosting collaborative manufacturing. The Minister also inaugurated the 16th India Trend Fair in Tokyo, a premier platform for Indian exporters to connect with Japanese buyers.

The visit underlined the need to fully utilise CEPA provisions, elevate quality and compliance standards, and build long-term partnerships to strengthen India's presence in Japan's quality-conscious and sustainability-driven textile market.



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### Trade Environment

The global trade environment is evolving rapidly. Geopolitical shifts, regional trade blocs, regulatory overhauls, and climate-conscious consumer behaviour are creating new rules of engagement for textile exporters. At the same time, the international community is increasingly focused on sustainability, ethical sourcing, and compliance, making it imperative for India to recalibrate its strategy.

On the domestic front, the Government of India has set an ambitious target to increase textile exports to USD 100 billion by 2030–31, underlining the sector's strategic importance in the national economy. A dedicated Task Force on Textile Exports, chaired by the Commerce Secretary, has been established to formulate actionable strategies. TEXPROCIL has actively participated in this platform, voicing the concerns of our members and putting forth pragmatic solutions for increasing competitiveness.

### Meeting with Hon'ble Union Minister of Agriculture

One of the key developments this month was the Council's engagement with Hon'ble Union Minister of Agriculture, Shri Shivraj Singh Chouhan, on July 11, 2025, in Coimbatore. TEXPROCIL Vice Chairman, Mr. Ravi Sam, along with CITI Past Chairman, Mr. T. Rajkumar, submitted a memorandum seeking the removal of the 11% import duty on cotton, which currently burdens both exporters and spinners.

This coincided with the high-level stakeholder consultation on cotton productivity, chaired by the Minister himself. The Minister announced a renewed commitment to ushering in a "New Cotton Revolution", with a clear focus on improving yield, profitability, and quality. Critical measures include revised penalties for substandard inputs, AI-enabled pest management, and research-backed promotion of premium seed varieties. These announcements are in perfect alignment with the goals of the recently launched Mission for Cotton Productivity, a five-year initiative aimed at revitalizing India's cotton production system and aligning it with both farmer and industry needs.

### TEXPROCIL – Amazon Global Selling Webinar

Recognising the pivotal role of digital trade channels, TEXPROCIL collaborated with Amazon Global Selling to organise a webinar on July 25, 2025, focused on enabling MSMEs to enter and scale in global e-commerce markets. With detailed sessions on account setup, product listing, cross-border logistics, and compliance, the webinar empowered participants with the knowledge and tools to tap into global buyers directly.

The prospects for growth in trade through E-Commerce has raised the eagerness of Indian exporters to embrace digital transformation. TEXPROCIL will continue to invest in such capacity-building programs to help our members grow beyond conventional

trade channels.

### Participation at Intex South Asia, Dhaka, Bangladesh

As part of our ongoing export promotion efforts, TEXPROCIL facilitated India's strong presence at the 16th Intex South Asia Show in Dhaka, Bangladesh, held from June 25–27, 2025. The India Pavilion showcased innovations in cotton and MMF textiles, with Kasturi Cotton Bharat being a highlight.

The show enabled fruitful interactions with major international buyers, sourcing companies, and associations such as BGMEA and BKMEA. Key issues such as payment delays, visa facilitation, and inland waterway logistics were discussed in official meetings, reaffirming Bangladesh's importance as a strategic and growing market for Indian textiles.

### Way Forward

Looking ahead, India's cotton textile sector must position itself for the next phase of global trade, marked by technology adoption, sustainability leadership, and product innovation. TEXPROCIL remains committed to supporting its members through policy advocacy, global branding, and market development initiatives.

Let us work collectively to reinforce India's image as a reliable, quality-conscious, and sustainable sourcing hub for cotton textiles. The time to act is now—and the Council is ready to collaborate in that mission with you.

**:: TEXPROCIL ::**



Avail more information on Value Addition in textiles, please write to  
Fabrics Sub-Committee @ TEXPROCIL on Email : [info@texprocil.org](mailto:info@texprocil.org)



## Investing in Cotton Textiles: A Strategic Opportunity



Expert Speaks



**Dr. Eric Trachtenberg is the Executive Director** of the International Cotton Advisory Committee (ICAC) where he provides strategic leadership to serve the cotton and textile community through promotion, knowledge sharing, innovation, partnerships, and by providing a forum for discussion of cotton issues of international significance.

Before coming to ICAC, he led design and oversight of investments to improve food security, support agricultural transformation, and strengthen land productivity at the Millennium Challenge Corporation (MCC). To date, 22 of MCC's compacts have included food security related investments totaling over \$5 billion, including investments in improving land governance in over 15 countries.

His earlier background includes 15 years' service with USDA's Foreign Agricultural Service (FAS) including diplomatic assignments in the Russian Federation, China, and Taiwan and founding the agricultural practice at McLarty Associates, a global strategic advisory firm. He has Masters' Degrees in Agricultural Economics from Michigan State University, another in Public Administration from the University of Southern California and Bachelors' degrees in Government and Economics from Cornell University

In this article, the thought expert, Dr. Eric Trachtenberg, highlights the strategic importance of investing in cotton textiles, particularly in emerging markets. He emphasizes how such investments can drive sustainable industrial growth, enhance value addition across the cotton value chain, and generate significant economic and environmental benefits globally.

### The ICAC commitment to support cotton

For decades, cotton has been losing fiber market share to synthetics — and that's a threat to everything positive that cotton provides the world. Cotton is a global public good that adds value far beyond just fiber. It provides income to vulnerable populations, helps rejuvenate the soil, and sequesters carbon to help fight global warming. The International Cotton Advisory Committee (ICAC) is developing new ways to support cotton ensure continues to bring benefits to both people and the planet.

One of the newest and most important opportunities to support the global cotton economy will be through the inaugural Global Cotton Textile Investment Summit (GCTIS), planned for 2026. The Summit will unite governments, investors, international organizations, NGOs, and industry stakeholders from all sectors of the cotton textile value chain. The goal will be to foster investment in the development of stronger value chains in ICAC member countries. This could include promoting a local textile industry in cotton-exporting countries, primarily in Africa. It also may encourage investment to preserve markets both up and downstream from textile production.

GCTIS participants will have opportunities to explore joint ventures, witness the latest technologies, and form strategic partnerships across the spectrum of cotton and textile industries. Such efforts ensure that investments are channeled toward high-impact areas while supporting sustainable industrial growth on a global scale. A major announcement about the exact dates and location will be coming soon.

### Why Invest in Cotton Textiles?

The global textiles and apparel industry, valued at approximately \$900 billion, is a critical sector in global trade. Cotton textiles, in particular, play a pivotal role, offering opportunities for economic diversification, industrial investment, and job creation, particularly in emerging markets. The investment potential of this sector has been underexplored - until now.

This article examines the strategic value of investing in cotton textiles, the opportunities it presents, and how stakeholders - from governments to private investors - can leverage the current landscape for sustainable growth and significant returns.

The rising demand for ethically sourced, high-quality textiles

underscores the market's robust growth trajectory. Cotton serves as the natural fiber backbone of this industry, catering to a diverse range of applications in fashion, home goods, and technical textiles — and doing it in a sustainable way. For investors, these expanding markets present clear opportunities to tap into long-term, stable demand.

Global economic transformations, including disruptions in traditional manufacturing hubs, rising production costs, and shifting trade dynamics, have created openings for competitive textile markets in emerging economies. Cotton-rich nations are particularly positioned to benefit as they transition from being raw material suppliers to value-added producers.

The global trend towards sustainability has made textiles produced from organic and ethically sourced cotton more attractive than ever. Businesses that prioritize eco-friendly practices in production and distribution are increasingly favored by consumers and brands, making this a noteworthy area for investment in the cotton value chain.

### The Benefits of Cotton Textile Investments in Emerging Markets

While cotton-textile investment is a global opportunity, emerging markets present particularly strong cases. Several benefits stand out:

#### 1. Value Addition Across the Entire Chain

By moving beyond raw cotton exports, countries can generate much greater revenue. Cotton valued at \$1 can be transformed into \$10 or more through processes like spinning, dyeing, and garment manufacturing. This not only boosts export potential but also fosters inclusive industrial growth.

#### 2. Access to Cost-Effective Labor

Emerging markets often benefit from abundant, cost-effective labor pools, which contribute to low production costs without compromising quality. This has made countries in Africa, Asia, and Latin America prime destinations for textile manufacturing.

#### 3. Geographical and Trade Advantages

Many cotton and textile-producing countries are



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## Expert Speaks



strategically located, offering access to key consumer markets. Additionally, favorable trade agreements like GSP+, AGOA, and various FTAs enhance their competitiveness by reducing tariff barriers.

### Applications of Investment Across the Cotton and Textile Sector

Investments in cotton textiles can span the entire value chain. Key areas include:

**Fiber and Yarn Production:** The starting point of the value chain involves producing high-quality fibers and yarns. Innovations in technology and sustainable practices have made this stage ripe for investment, particularly in improving yield and lowering environmental costs.

**Processing and Dyeing:** Efficient and eco-friendly dyeing processes are in high demand as sustainability takes center stage in international markets. Investing in processing facilities is, therefore, a smart move that aligns with both market needs and environmental goals.

**Manufacturing and Export:** From ready-made garments to technical textiles, manufacturing hubs in emerging economies

## Investing in Cotton Textiles: A Strategic Opportunity

serve growing international markets. This stage of the value chain provides significant job creation while maximizing export revenue.

**Innovations in Technology and Logistics:** Adopting cutting-edge technologies like AI-driven manufacturing and efficient logistics systems can enhance productivity, compliance, and sustainability. These innovations attract investment and elevate the competitiveness of emerging markets on the global stage.

### Why the Time Is Now

Changing trade dynamics, coupled with the global emphasis on sustainability, make this a critical window for cotton textile investments. Emerging economies are transforming into hubs for textile innovation and value addition, providing investors with opportunities to capitalize on growing demand, cost advantages, and the potential for sustainable returns.

By engaging with the cotton textile sector now, investors can play a vital role in reshaping not only their portfolios, the future of the world's most important natural fiber, and help launch an industrial revolution. Investing in cotton textiles offers a pathway to a bright and profitable future - one that we will all benefit from in many ways.

## Policy Updates



## Important Notifications on Policies & Procedures



Kindly get in touch with TEXPROCIL Grievance Redressal Cell for any clarifications, if required, on the herein shared notifications issued recently by the Council. The Member companies are appealed by the Council to send their suggestions sought on the various issues.



### A) Clarification regarding Export of Organic Textiles

DGFT vide Policy Circular No.1/2025-26 dated 15.07.2025 has clarified that - Organic textiles do not fall within the ambit of accreditation categories prescribed under the "National Programme for Organic Production".

Therefore, requirement of a Transaction Certificate from a NAB-accredited body does not apply to exports of Organic Textile products.

Link of the Circular: <https://tinyurl.com/27skmeh5>

### B) Clarification regarding applicability of Para 2.12 of FTP 2023

Importers faced problems as some Customs officers insisted on warehousing merely because the goods were shipped before the date of the Authorisation, leading to unnecessary delays and additional costs-contrary to the objective of Para 2.12, which aims to facilitate smoother import clearances.

To address this, DGFT, through Policy Circular No. 2/2025-26 dated 22.07.2025, has clarified that warehousing is not mandatory solely due to earlier shipment. As long as the Authorisation is available before Customs clearance, goods can be cleared directly-except for Restricted items or those routed through STEs.

Link of the Circular: <https://tinyurl.com/tdc583hv>



## Union Minister, Shri. Shivraj Chouhan chaired high-level meet on cotton crisis in Coimbatore

## Trade Promotion

A high-level meeting focused on boosting cotton productivity was convened on 11th July 2025 under the leadership of Union Agriculture Minister Mr. Shivraj Singh Chouhan. The session brought together key stakeholders including Union Textile Minister Mr. Giriraj Singh, agriculture ministers from Haryana and Maharashtra, ICAR DG Dr. M.L. Jat, agricultural university VCs, scientists, and farmers.

Mr. Chouhan emphasized the strategic importance of cotton, calling it the “second most essential need after food.” He acknowledged the current challenges such as declining yields, disease threats to BT cotton, and the urgent need for virus-resistant, high-yielding seed varieties. The Minister also highlighted the need to balance farmer welfare and textile industry demands, especially around cotton import duties.

The meeting included field visits and farmer interactions, and is part of the broader ‘Viksit Krishi Sankalp Abhiyan’, which aims to drive crop-specific, region-focused agricultural reforms. Mr. Chouhan reaffirmed the government’s commitment to making India self-reliant in cotton and ensuring farmers benefit from modern agricultural innovations.

Mr. Chouhan emphasized the need to balance the interests of both farmers and the textile industry, noting that while the industry seeks duty-free cotton imports, farmers argue this depresses local prices. As part of his Viksit Krishi Sankalp Abhiyan, he highlighted previous consultations on soybeans in Indore and the latest meeting in Coimbatore focused on cotton, continuing a crop-wise, state-specific approach to agricultural development.



## Trade Promotion



## A Report on 16th Intex South Asia Show held in Dhaka, Bangladesh

As part of its Export Promotion Programme for the financial year 2024-25, The Cotton Textiles Export Promotion Council (TEXPROCIL) organized the participation of its member exporters at the 16th edition of the Intex South Asia Show held at the International Convention City Bashundhara (ICCB), Dhaka, Bangladesh from 25th to 27th June 2025, organized by Worldex Exhibitions.

### 1. TEXPROCIL Participation

TEXPROCIL set up the India Pavilion under its banner in Hall 4, consisting of 22 booths, including the Council's own booth. An additional 27 Indian companies, including 10 TEXPROCIL member exporters, also participated through raw space. Prominent names among them included Salona Cotspin, S.P. Yarns, Manan Tex, Kewalram Textiles Pvt. Ltd., Lahoti Overseas, Texperfs, among others.

### 2. Inaugural Function

The event was inaugurated on **25th June 2025**.



Mr. Murali Balkrishna, Joint Director, TEXPROCIL, delivered the **Opening Address**, attended by several dignitaries, including:

- **Secretary, Ministry of Commerce, Government of Bangladesh**
- **Mr. Mahbubur Rehman**, Vice Chairman & CEO, Export Promotion Bureau
- **Mr. Anwar Hossain**, Director, BGMEA
- **Mr. Faisal Samad**, Sr. Vice President, BKMEA
- **Mr. Amal Podder**, Senior VP, BKMEA

The dignitaries toured the TEXPROCIL booth and interacted with Indian exhibitors. The India Pavilion was formally inaugurated by leading Indian exporters including representatives from

**Winsome Textiles, Alok Industries Ltd, Shroff Textile Exports Pvt. Ltd., Ravali Spinners, and others.**

### 3. Event Promotion & Participation

To support and promote Indian exhibitors:

- TEXPROCIL printed and distributed **Exhibitor Catalogues** at the venue.
- Soft copies of exhibitor profiles were shared with **BGMEA and BKMEA**.
- Invitations were sent to previous participants of **Bharat Tex 2024 and 2025** through email and WhatsApp.

### Participation Overview:

Total Exhibitors: ~150

- India: 49
- China: 52
- Bangladesh: 19
- Others: Korea, Thailand, Japan
- Total Visitors: 6,890 from 22+ countries
- Visitor profiles: Agents, Traders, Sourcing Companies, Brands, and Manufacturers

### 4. TEXPROCIL Booth & Kasturi Cotton Bharat Promotion

TEXPROCIL was allotted a **15 sqm complimentary booth**, which prominently showcased the **Kasturi Cotton Bharat programme**. Displayed items included yarn cones, fabric swatches, finished products, and marketing literature.

### Key Outcomes:

- 80 trade enquiries received
- Active engagement with brands like Zara, Marks & Spencer, Bestseller, and major manufacturers
- Interest shown by a few vendors in developing samples using Kasturi Cotton

### 5. Key Meetings

#### A. High Commission of India

- TEXPROCIL met Mr. Gourab Kumar Agarwal, Second Secretary, to raise:
  - ✓ Payment issues due to banking defaults
  - ✓ Request for list of defaulting banks
  - ✓ Visa facilitation for buyers with Council-endorsed invitations
  - ✓ Support for **pilot shipment via inland waterways** (Haldia–Muktarpur)





## A Report on 16th Intex South Asia Show held in Dhaka, Bangladesh



Trade Promotion

### B. BKMEA



Meeting with top BKMEA officials including **Mr. Fazlee Shamim Ehsaan** (Executive President), **Mr. Amal Podder**, and **Mr. M.S. Zaman**

#### Discussion points:

- ✓ Payment delays, especially from **Islami Bank**
- ✓ Pilot shipment collaboration via **Haldia Muktarpur route**
- ✓ BKMEA's request to High Commission for **multiple-entry visas**

A copy of TEXPROCIL's **70th Year Celebration Handbook** was presented

### B. BGMEA



- Meeting with newly elected **President Mr. Mahmud Hasan Khan (Babu)** and **Mr. Mohammed Sohel**
  - Payment issues discussed; request for list of defaulting banks
  - Proposal for **Buyer-Seller Meet** in Dhaka or Mumbai received positively
  - Support sought for pilot shipment initiative
  - TEXPROCIL's 70th Year Handbook presented

### C. BEST SELLER (Denmark-based group with 20 brands)



- Meeting with **Mr. Shehan Wijethilaka** (Materials Management Specialist)
- Participation from **Indian exhibitors** and **authorized vendors**: Amantex, Auko-Tex Group, Mithela Group
- Presentation of Kasturi Cotton; interest shown in developing samples

### 6. Pilot Shipment: Haldia–Muktarpur Route

- Meeting with Mr. Hakim (Summit Alliance) and Mr. Johir (Sea Glory Shipping Pvt Ltd)
- Participation from Winsome Textiles
- Route: Sea + Inland Waterways to Pangoan Port
- Rates discussed:
  - ✓ USD 650 (20 ft), USD 1300 (40 ft HQ)
  - ✓ Request to revise rates considering lightweight yarn
- Issues with LC timelines discussed; free demurrage of 14 days at Muktarpur
- Confirmation pending on documentation and processes

### 7. Market Observations

- Bangladesh continues to be a volume-driven, price-sensitive market
- MMF (Man-Made Fibres) gaining traction as manufacturers diversify
- Indian yarn prices are 10–15 cents/kg higher, impacting competitiveness
- Sector faces challenges including:
  - ✓ Power cost hikes
  - ✓ FX shortages
  - ✓ Political uncertainties
  - ✓ New sourcing trends focused on sustainability and technical textiles

### Future Outlook:

Bangladesh remains a strategic market for Indian cotton and MMF textiles, with evolving trends and increasing interest in sustainable sourcing. Despite current challenges, buyer engagement remains high. TEXPROCIL's continued participation in future editions is critical to maintaining and expanding market share.



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## Special Feature



# Life Cycle Assessment (LCA) -an Emerging Trend

### 1. Introduction

Life Cycle Assessment (LCA) is a standardized method (as per ISO 14040/14044) used to evaluate the environmental impacts associated with all the stages of a product's life — from raw material extraction (cradle) to disposal (grave). In the context of cotton, LCA provides a scientific basis to understand and reduce its environmental footprint across the entire supply chain: from cultivation to finished textiles.

### 2. Goal and Scope Definition

The **goal** of an LCA for cotton is to:

- Identify the environmental hotspots in the cotton value chain,
- Guide sustainable decision-making for stakeholders (farmers, ginner, manufacturers, brands),
- Compare conventional vs sustainable cotton systems (e.g., BCI, Organic, RegenAgri).

**Scope** includes defining system boundaries (cradle-to-grave or cradle-to-gate), functional unit (typically 1 kg of cotton lint or 1 cotton T-shirt), and allocation methods for co-products (e.g., cottonseed).

### 3. Life Cycle Stages of Cotton

#### 3.1. Cultivation (Agricultural Phase)

- Inputs: Seeds, water, fertilizers, pesticides, energy for tillage/irrigation.
- Outputs/Emissions:
  - ✓ CO<sub>2</sub>, N<sub>2</sub>O from fertilizers,
  - ✓ Pesticide run-off,
  - ✓ Water usage (blue and green water),
  - ✓ Land degradation.

*This phase often has the **highest environmental burden**, particularly in terms of water footprint and global warming potential.*

#### 3.2. Harvesting and Ginning

- Processes: Mechanical picking, transport to gins, ginning (separation of lint and seed).
- Emissions: Electricity usage, dust emissions, CO<sub>2</sub> from fuel usage.
- Co-products: Cottonseed (used for oil, feed).

#### 3.3. Spinning

- Processes: Conversion of lint to yarn.
- Impacts: Electricity consumption (often from fossil sources), lubricants, and water use.

#### 3.4. Fabric Manufacturing (Weaving/Knitting + Wet Processing)

- **High-impact processes:**
  - ✓ Dyeing and finishing (especially for water and energy usage),
  - ✓ Chemical usage (dyes, softeners, bleaches).

#### 3.5. Garment Manufacturing

- Processes: Cutting, stitching, packaging.
- Impacts: Electricity, waste fabric, labour conditions.

#### 3.6. Distribution & Retail

- Impacts: Packaging, transportation, warehousing (energy usage), and emissions.





## Life Cycle Assessment (LCA) -an Emerging Trend



Special Feature

### 3.7. Use Phase

- Consumer impacts: Washing, drying, ironing (high energy and water use over time).
- Extended lifetime of garments can reduce overall LCA impacts.

### 3.8. End-of-Life

- Disposal: Landfilling, incineration, recycling.
- Environmental costs: Methane emissions from landfill, CO<sub>2</sub> from incineration.

### 4. Key Impact Categories in Cotton LCA

Impact Category	Unit	Typical Sources
Global Warming Potential	kg CO <sub>2</sub> e	Fertilizer use, fossil fuel-based energy
Water Footprint	Liters	Irrigation, dyeing, washing
Energy Consumption	KWh	Processing stages (spinning, dyeing)
Eutrophication Potential	g PO <sub>4</sub> -eq	Fertilizer runoff, wastewater from dyeing
Land Use & Soil Carbon Change	m <sup>2</sup> or kg CO <sub>2</sub> e	Farming practices, tillage, monoculture

### 5. Tools and Methodologies

- Software: SimaPro, OpenLCA, GaBi
- Databases: Ecoinvent, Agrifootprint
- Standards: ISO 14040/44, Product Environmental Footprint (PEF), GHG Protocol.

### 6. Strategies for Reducing LCA Impact in Cotton

Stage	Improvement Strategy
Cultivation	Drip irrigation, organic inputs, regenerative farming
Processing	Renewable energy use, water recycling, low-impact dyes
Product design	Designing for durability, recyclability
End-of-life	Promote recycling, composting of natural fibers

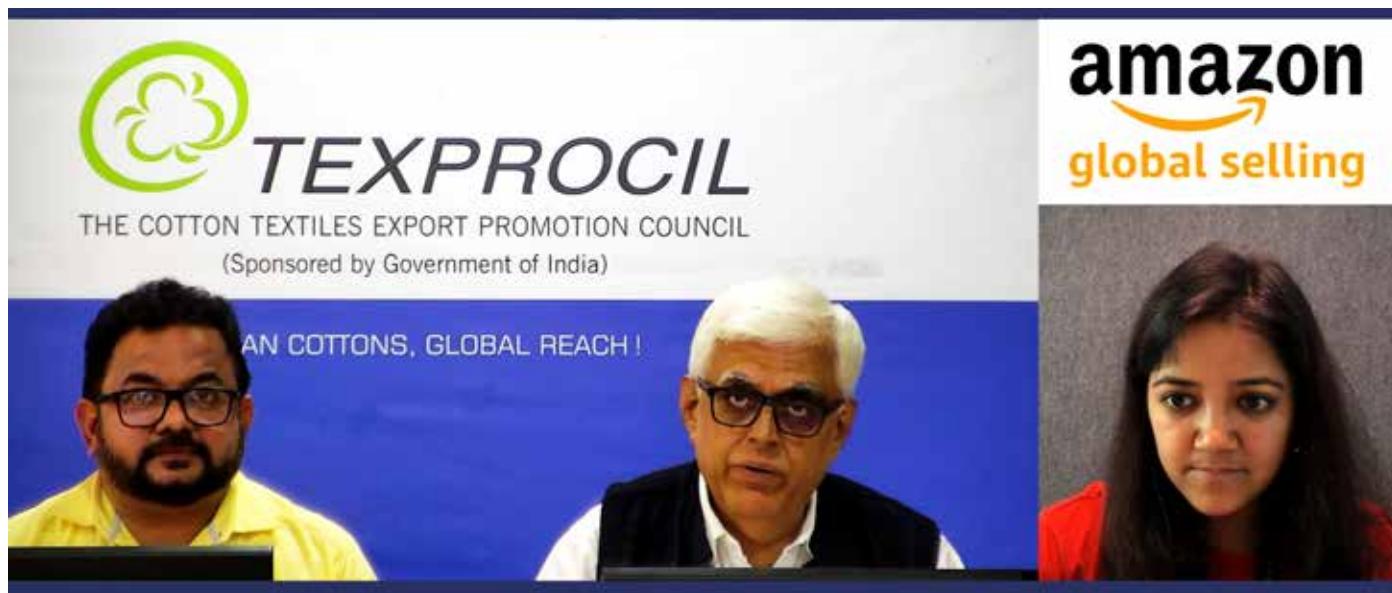
### 7. Conclusion

Understanding the LCA of cotton provides an integrated perspective of its environmental performance and helps identify intervention points for reducing its footprint. As sustainability becomes increasingly central to global textile supply chains, applying LCA helps stakeholders-from farmers to fashion brands-align with global climate goals, SDGs, and consumer expectations.





## E-Commerce Exports through Amazon Global Selling



In recent years India has experienced a boom in internet and smartphone penetration. This rapid rise in internet users and smartphone penetration coupled with rising incomes has assisted the growth of India's e-commerce sector. India's e-commerce sector has transformed the way business is done in India and has experienced immense growth in recent years.

With a view to support its members, TEXPROCIL (The Cotton Textiles Export Promotion Council) in collaboration with Amazon Global Selling organised a Webinar on July 25, 2025 on the topic "E-Commerce Exports through Amazon Global Selling".

The webinar focused on enabling Indian textile exporters, particularly those in the MSME sector, to harness the power of e-commerce for international trade. With the growing prominence of digital platforms, the session aimed to educate participants on how to access global markets through Amazon Global Selling.

Mr. Rajesh Satam, Joint Director at TEXPROCIL, initiated the session by welcoming participants and setting the stage for the discussions. He emphasized the transformative role of digital technology in creating new export opportunities for small and medium enterprises. Textiles and apparel, which account for approximately 60% of demand on global online marketplaces, are a key strength for India. The training was designed to help exporters understand how to enter global markets via e-commerce in an efficient and scalable way.

Dr. Siddhartha Rajagopal, Executive Director of TEXPROCIL, delivered the welcome address. He warmly welcomed the team from Amazon Global Selling, including Ms. Anutha Arjun and Ms. Riya Bose, and appreciated their efforts in organizing the training session. He highlighted how technology has changed the landscape of international trade, enabling even the smallest of businesses to reach buyers across the world. He stressed that this digital transformation represents a golden opportunity for Indian MSMEs to grow their global presence.

Dr. Rajagopal also pointed out that over 1.5 lakh Indian exporters are already using Amazon to sell in more than 18 global marketplaces. Amazon's goal of enabling \$80 billion in e-commerce exports from India by 2030 aligns with national

objectives to boost non-traditional exports and develop global brands from India. Dr. Rajagopal encouraged participants to actively engage with the session and start their own journeys in global e-commerce with confidence.

The main presentation was delivered by Ms. Anutha Arjun, Trainer at Amazon Global Selling. She began by explaining the basics of e-commerce exports and introduced participants to the Amazon Global Selling platform. The session covered essential topics such as account registration, product listings, logistics, and international payments. Ms. Anutha also provided guidance on compliance requirements and strategies for pricing and profitability in cross-border transactions.

Participants had an opportunity to ask questions during the interactive Q&A session. These questions touched on various practical aspects of getting started, including documentation, logistics management, product selection, and understanding cost structures. The session served to clarify key concerns and build confidence among exporters considering this route.

Ms. Riya Bose, Senior Export Enablement Manager – Partnerships at Amazon Global Selling, gave the concluding remarks. She thanked TEXPROCIL and all the attendees for their enthusiastic participation. She reiterated Amazon's commitment to supporting Indian exporters and encouraged them to embrace the digital-first model for expanding their global footprint.

The webinar reinforced that e-commerce is a dynamic and accessible channel for Indian textile exporters to reach international buyers. Amazon Global Selling provides a comprehensive suite of tools and resources to support this journey. TEXPROCIL reaffirmed its commitment to guiding exporters through continued capacity-building programs and collaborative initiatives like this one.

TEXPROCIL extends its sincere thanks to the Amazon Global Selling team and all participating members. The success of the session reflects the growing interest in e-commerce exports, and TEXPROCIL looks forward to organizing similar knowledge-sharing programs in the near future.





## Country Report - France



## Trade Update

### Highlights of Textile Industry in France

France remains a **mid-sized player** in cotton trade, importing US \$500 M+ and exporting US \$300 M+ in cotton products.

France is pivoting toward **higher-margin categories**: specialty fabrics and yarn, with export values growing despite volume drop.

**Strategic diversification**: strong markets in North Africa, Europe, and resilience via premium and niche product lines.

**Recent downturns** (2023–24) hint at cyclical softness—yet technical innovation and supply chain resilience offer upside in 2025.

### Market Overview & Trade Statistics

- **Import market**: France is Europe's **5th-largest** importer of cotton (2018: €339M; down ~3% p.a.). Cotton fabric dominates (71% of imports), followed by yarn (21%) and raw cotton (8%).
- **Import sources 2023**: Major suppliers include Italy (23%), Belgium (14%), Turkey (9%), Germany & Portugal (~6%).
- **Exports**: In **2022**, cotton fabric exports from France rose to **\$237M** (+3.9% from 2019), shipping mostly to Tunisia, Belgium, Morocco, Germany, and Italy.

### Industry Structure & Key Players

- **Scale**: Textile accounts for ~2% of French manufacturing valueadded, employing ~103,000 workers across ~250 larger firms.
- **Regional focus**: Activity is concentrated in Auvergne-Rhône-Alpes, Hauts-de-France, Grand Est, Occitanie, and Normandy.
- **Specialisation**: While mass-market production has largely moved abroad, France still leads in luxury and technical textiles—including silks, home linens, automotive and aerospace fabrics.

### Recent Trends & Drivers

#### 1. Sustainability & Localisation

- ✓ Growing demand for **organic cotton**, recycled fabrics, and circular production. Government-backed green policies and consumer environmental awareness are driving relocalisation.

#### 2. Technological Innovation

- ✓ French firms are advancing in **smart textiles**—functional fabrics for healthcare, sports, and defense. The textile hub of IFTH is leading R&D.

#### 3. “Made in France” Branding

- ✓ Strong premium for domestic manufacturing, especially in luxury and designer markets (e.g. Toile de Jouy heritage prints)

### Production Outlook

- **Volatility**: Woven cotton fabric output soared in 2021 (+180%), dropped -43% in 2022, and stabilised in 2023 (+0.7%).
- **Future forecasts**: Expect modest growth (~0.6% p.a.) through 2028 as investment in sustainable manufacturing continues.

### Challenges & Strategic Responses

#### 1. Cost competitiveness

- ✓ High labour costs pressurize pricing. France counters through quality, niche markets, automation, and digitalisation.

#### 2. Global competition & supply chain complexity

- ✓ Blends of local and Asian sourcing are adopted to balance quality and costs.

#### 3. Labour shortages & skills gaps

- ✓ Difficulties in attracting talent persist, despite better work conditions

TEXPROCIL															
France Imports of Textiles & Clothing in 2024															
TEXTILES Et CLOTHING				TEXTILES				CLOTHING				COTTON TEXTILE ITEMS (YARN/FABRICS/MADEUPS)			
Rank	Suppliers	Mn US \$	% share	Rank	Suppliers	Mn US \$	% share	Rank	Suppliers	Mn US \$	% share	Rank	Suppliers	Mn US \$	% share
	World	33,479.90	100		World	7,956.48	100		World	25,523.42	100		World	2,611.81	100
1	China	7,171.45	21.42	1	China	1,447.60	18.19	1	China	5,723.85	22.43	1	China	568.45	21.76
2	Bangladesh	3,941.88	11.77	2	Italy	882.39	11.09	2	Bangladesh	3,814.63	14.95	2	Pakistan	356.22	13.64
3	Italy	3,580.14	10.69	3	Germany	578.2	7.27	3	Italy	2,697.74	10.57	3	India	208.42	7.98
4	Tiirkiye	2,034.34	6.08	4	Belgium	493.21	6.2	4	Tiirkiye	1,645.70	6.45	4	Italy	149.34	5.72
5	India	1,520.83	4.54	5	Pakistan	447.64	5.63	5	Viet Nam	1308.59	5.13	5	Turkiye	140.88	5.39
6	Viet Nam	1,402.65	4.19	6	India	405.57	5.1	6	India	1115.26	4.37	6	Portugal	136.32	5.22
7	Tunisia	1,243.15	3.71	7	Tiirkiye	388.63	4.88	7	Cambodia	1056.98	4.14	7	Tunisia	127.96	4.9
8	Pakistan	1,164.77	3.48	8	Netherlands	371.09	4.66	8	Tunisia	1006.73	3.94	8	Netherlands	95.4	3.65
9	Cambodia	1,060.91	3.17	9	Spain	346.81	4.36	9	Morocco	970.02	3.8	9	Belgium	94.06	3.6
10	Morocco	1,020.20	3.05	10	UK	304.35	3.83	10	Pakistan	717.14	2.81	10	Germany	93.56	3.58

COTTON YARN IMPORTS				COTTON FABRIC IMPORTS				COTTON MADEUP IMPORTS				RAW COTTON			
Rank	Suppliers	Mn US \$	% share	Rank	Suppliers	Mn US \$	% share	Rank	Suppliers	Mn US \$	% share	Rank	Suppliers	Mn US \$	% share
	World	88.87	100		World	420.99	100		World	2101.94	100		World	67.66	100
1	Tiirkiye	24.69	27.78	1	Italy	88.32	20.98	1	China	517.5	24.62	1	Tiirkiye	15.05	22.25
2	Portugal	13.06	14.7	2	China	47.95	11.39	2	Pakistan	327.72	15.59	2	USA	14.77	21.83
3	Italy	10.18	11.45	3	Spain	30.76	7.31	3	India	191.43	9.11	3	Germany	7.95	11.75
4	Germany	7.74	8.71	4	Tiirkiye	28.42	6.75	4	Tunisia	127.26	6.05	4	Poland	6.7	9.9
5	Belgium	7.74	8.7	5	Portugal	26.34	6.26	5	Portugal	96.92	4.61	5	Italy	3.94	5.82
6	Spain	5.85	6.58	6	Pakistan	25.47	6.05	6	TO rkiye	87.77	4.18	6	Pakistan	3.92	5.79
7	India	4.1	4.61	7	Belgium	25.37	6.03	7	Netherlands	83.1	3.95	7	Spain	3.31	4.9
8	Pakistan	3.03	3.41	8	UK	21.85	5.19	8	Bangladesh	70.36	3.35	8	India	2.24	3.3
9	China	2.99	3.37	9	Germany	17.76	4.22	9	Germany	68.07	3.24	9	Belgium	2.15	3.18
10	Egypt	2.07	2.33	10	India	12.9	3.06	10	Romania	61.41	2.92	10	Japan	1.48	2.18

## Trade Update



## QUICK ESTIMATES FOR TEXTILES & CLOTHING (APRIL - JUNE' 25)

QUICK ESTIMATES FOR TEXTILES & CLOTHING (APRIL – JUNE' 25)						
Exports(MillionUSD)	JUNE'24	JUNE'25	% Change	APR'24-JUNE'24	APR'25-JUNE'25	% Change
Cotton Yarn/Fabs/made-ups, Handloom Productsetc	960	930	-3.07%	2,917	2,860	-1.94%
Man-made Yarn/Fabs/ made-ups etc.	383	373	-2.56%	1,165	1,167	0.11%
RMG of all Textiles	1,294	1,310	1.23%	3,850	4,193	8.91%
Jute Mfg. Floor Covering	27	34	23.44%	83	94	12.48%
Carpet	121	124	2.04%	363	371	2.06%
Handicrafts excl. handmade carpet	134	131	-2.50%	408	398	-2.21%
Textiles	1,626	1,592	-2.07%	4,936	4,890	-0.94%
Apparel	1,294	1,310	1.23%	3,850	4,193	8.91%
<b>Textiles &amp; Apparel</b>	<b>2,920</b>	<b>2,902</b>	<b>-0.61%</b>	<b>8,786</b>	<b>9,082</b>	<b>3.37%</b>
All Commodities	35,163	35,144	-0.05%	110,057	112,175	1.92%
% Share of T&C in Total Exports	8.30%	8.26%		7.98%	8.10%	

Imports (Million USD)	JUNE'24	JUNE'25	% Change	APR'24-JUNE'24	APR'25-JUNE'25	% Change
Cotton Raw & Waste	70	74	5.00%	152	263	72.96%
Textile yarn Fabric, made-up articles	209	206	-1.43%	557	620	11.28%

Source: DGCIS/MOC

- According to the quick estimates data released by the Ministry of Commerce & Industry, exports of cotton yarn/fabrics/made-ups, handloom products etc from India have declined by (-) 3.07% in June 2025 over June 2024.
- During Apr – June'25, Indian cotton yarn/fabrics/made-ups, handloom products have declined by (-) 1.94%.
- During June'25, Indian Textiles Exports have declined by (-) 2.07% over the previous year while Apparel Exports registered a growth of 1.23% during the same time period.
- Cumulative Exports of Textiles and Apparel during June'25 have declined (-) 0.61% over June'24
- During Apr-June'25, Indian Textiles Exports have declined by (-) 0.94% over the previous year while Apparel Exports registered a growth of 8.91% during the same time period. Overall T&A registered a growth of 1.92% during Apr-June'25.



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## Latest International Trade Updates on Import/Export of Textiles



### Trade Update

#### South Africa's textile imports up 1.2% to \$1.4 bn in Jan-May 2025

South Africa's imports of textiles and textile articles (under Chapters 50–63) totalled 26,300.5 million rand (~\$1.4 billion) during January–May 2025, according to preliminary data released by the South African Revenue Service in its May 2025 report. This represents a 1.2 per cent increase compared to the same period last year. The trade figures include transactions with Botswana, Eswatini, Lesotho, and Namibia (BELN).

Official merchandise trade statistics show that, during the same period in 2024, the country imported textiles and textile articles worth 25,985 million rand. South Africa continues to be a net importer in this product segment.

Exports of textiles and related products edged up by 2.2 per cent, reaching 9,987.2 million rand (~\$565.94 million) in the first five months of 2025, compared to 9,773.1 million rand in the corresponding period of 2024.

In May 2025, South Africa's imports of textiles and textile articles under Chapters 50–63 stood at 4,739.7 million rand (~\$268.55 million), reflecting a 4.7 per cent decrease from imports of 4,816.3 million rand in April 2025.

Exports under the same chapters fell by 13.2 per cent to 2,027.0 million rand (~\$114.87 million) in May 2025, from 2,334.0 million rand in April 2025.

South Africa's textile trade showed a downward trend in May 2025 on a month-on-month basis. However, cumulative textile trade maintained a positive trend.

In 2024, the country's imports of textiles and textile articles reached 65,476 million rand (~\$3,551.95 million), up 10 per cent from 59,528.9 million rand in 2023. Exports of textiles and related products edged up by 1.8 per cent, amounting to 23,578.8 million rand (~\$1,279.11 million) in 2024, compared to 23,155.9 million rand in 2023.

#### India's apparel exports to Brazil jump 31% in Q1 2025

Indian Prime Minister Narendra Modi's rare visit to Brazil, Ghana, Argentina, Trinidad & Tobago, and Namibia has highlighted India's growing relations with these countries. Among them, Brazil is India's largest textile trading partner. India's apparel exports to Brazil and its cotton imports from the country recorded a significant rise in the first quarter of the current year.

India's apparel exports to Brazil surged 31 per cent to \$16.792 million during January–March 2025, compared to \$12.080 million in the same period last year, according to Fibre2Fashion's market insight tool TexPro.

India's apparel exports totalled \$88.347 million in 2024. The shipment value has shown a consistent rise over the last three years. In 2022, India exported apparel worth \$71.044 million. This rose by 13.5 per cent to \$80.607 million in 2023 and further increased by around 10 per cent in 2024.

Brazil is one of the world's major cotton producers, while India is among the largest cotton consumers. India imported \$100.306 million worth of cotton from Brazil in the first quarter of this year, which is 25 per cent higher than the total cotton imports from Brazil in 2024, valued at \$80.890 million. In contrast, India's cotton imports from Brazil were negligible at just \$0.316 million in the first quarter of 2024.

Higher domestic cotton prices in India have prompted the

textile industry to import more affordable cotton from Brazil. These imports began rising in the third quarter of last year. India's cotton marketing year begins in October.

India's apparel exports to Argentina, Ghana, Trinidad & Tobago, and Namibia remained limited in recent years. In the first quarter of 2025, exports were recorded at \$1.683 million to Argentina, \$1.721 million to Ghana, \$1.301 million to Trinidad & Tobago, and \$0.277 million to Namibia, as per TexPro.

During the first quarter of 2024, exports stood at \$1.212 million to Argentina, \$1.484 million to Ghana, \$1.123 million to Trinidad & Tobago, and \$0.279 million to Namibia. India's total outbound trade in 2024 reached \$9.341 million to Argentina, \$7.597 million to Ghana, \$5.805 million to Trinidad & Tobago, and \$0.541 million to Namibia.

India has strong opportunities to expand its market presence in these countries, which also import apparel and other textile products from various global exporters.

#### Australia's apparel imports rise 6.7% to \$7.94 bn in Jul-May FY25

Australia's imports of apparel and clothing accessories (classified under code 84) increased by 6.75 per cent to Au\$12.119 billion (~\$7.940 billion) during July 2024–May 2025, the first eleven months of fiscal 2024–25 (July–June), according to the latest trade data released by the Australian Bureau of Statistics (ABS). The country had imported apparel and clothing accessories worth Au\$11.352 billion during the same period in 2023–24. There was also a month-on-month (MoM) increase in imports in May 2025.

Imports of textile yarn, fabrics, and made-up articles (classified under code 65) rose by 5.17 per cent, reaching Au\$4.251 billion (~\$2.785 billion) in the first eleven months of the current fiscal, compared to Au\$4.042 billion in the same period last fiscal. Conversely, fibre imports (classified under code 26) fell to Au\$109 million, down from Au\$117 million during the period under review.

In May 2025, imports of apparel and clothing accessories increased by 8.39 per cent to Au\$0.997 billion, up from Au\$0.920 billion in May 2024. However, imports of textile yarn, fabrics, made-up articles, and related products eased to Au\$386 million, compared to Au\$392 million in May 2024. Fibre imports were higher at Au\$12 million, compared to Au\$10 million in May 2024.

Meanwhile, Australia's exports of textile fibres (code 26) were valued at Au\$5.499 billion (~\$3.602 billion) during July 2024–May 2025, marking a 13.83 per cent decrease from Au\$6.382 billion in the corresponding period of the previous year. Exports in May 2025 fell by 15.56 per cent to Au\$358 million, compared to Au\$424 million in May 2024.

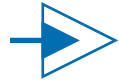
In fiscal 2023–24, Australia's apparel and clothing imports totalled Au\$12.231 billion (\$7.748 billion), a decline of 5.2 per cent from Au\$12.903 billion recorded in 2022–23. Similarly, imports of textile yarn and fabrics dropped by 9.40 per cent, from Au\$4.825 billion in 2022–23 to Au\$4.371 billion (~\$2.767 billion) in 2023–24.

Australia exported textile fibres worth Au\$7.053 billion (~\$4.465 billion) in 2023–24, representing a decline of 13.97 per cent from Au\$8.199 billion in 2022–23. Notably, Australia remains a significant producer and exporter of cotton.





## Trade Update



### How the tariff turbulence is hitting Southeast Asia

The tariff upsurge initiated by US President Donald Trump, notably against China, has been viewed as a protectionist strategy to safeguard American jobs and trade deficits. Like a stone thrown into a pond, the US tariffs have sent ripple effects far beyond the borders of the US. The economies of the Global South are the most affected, including many countries in Asia, Latin America, and Africa, with emerging markets, export dependencies, and developing infrastructures.

The tariff turbulence, created due to the imposition of high tariffs by Donald Trump on China, has disrupted the economic stability and development trajectories of countries in ASEAN. These economies are not bystanders in global trade tensions; they are intensely involved in global pricing and the global value chain.

Nevertheless, Southeast Asian economies are now being squeezed by Chinese exports on one hand and US tariffs on the other. Chinese goods that were originally targeted for the US markets now have to find new markets because of the US imposition of high tariffs on Chinese exports. And the obvious markets are in Southeast Asia. Therefore, when titans clash, the tariff turbulence hits ASEAN.

According to an article co-authored by former Indonesian Minister of Trade Mari Pangestu, Southeast Asia is about to be hit by a tsunami of cheap Chinese goods. A high influx of Chinese goods into the Indonesian market will adversely affect the job market as well as the manufacturing industries of Indonesia.

China has a massive comparative advantage in textile manufacturing industries due to its substantial technological command, which makes it almost impossible for Indonesian textile industries to compete with China.

For instance, the dumping of cheap Chinese fabric in Indonesia is often cited as one of the main reasons behind the decline and subsequent closure of Indonesian textile giant Sritex on March 1. Thus, Indonesia faces the biggest challenge in its domestic market from the dumping of Chinese goods.

US tariffs on Chinese goods will also have a hostile impact on Malaysia's solar panel manufacturing industry. Although the US was initially a stronghold of solar module manufacturing, things changed in 2010 when China acquired a comparative advantage, leading to the shutdown of many US solar panel manufacturing plants.

The Biden administration has tried to support this industry through subsidies and announced tariffs on solar panel imports from Southeast Asia of up to 271 percent, citing anti-dumping and anti-subsidy grounds. These tariffs have been increased further under the Trump administration. As a result, many of China's leading solar manufacturing companies are closing or cutting back the operations of their plants in Malaysia.

China has also announced the shutdown of solar panel manufacturing operations in Thailand and Vietnam. Experts say that Chinese exports have already put some Malaysian industries out of operation, and US tariffs will have a further detrimental impact. Some of the tariff exemptions can partially

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protect semiconductors, which are Malaysia's largest export category to the US. Nonetheless, new tariffs will still negatively impact many other Malaysian industries such as furniture, textiles, rubber, plastics, etc.

According to Chinese customs data, China's largest export market in 2023 was ASEAN, with an annual value of \$523.7 billion. Since the Chinese economy is not growing as fast, China needs to increase its exports and investment in ASEAN. However, rising Chinese exports are exerting significant pressure on ASEAN's domestic manufacturers. Thus, the relationship between China and ASEAN is becoming more complex.

Southeast Asian countries are also experiencing high imports of various low-cost Chinese products through Chinese e-commerce giants such as Temu, Shein, and apps like Lazada, owned by Alibaba, which compete extensively with local manufacturers.

The range of Chinese commodities that Malaysian consumers can buy has been growing. Apart from the consequences of US tariffs on China, challenges such as overcapacity of Chinese manufacturers, the slowdown of the Chinese economy, and reduced consumer spending in ASEAN have led to increased exports of Chinese products to significant parts of Southeast Asian markets.

To address this situation, Indonesia, ASEAN's largest economy, is strengthening its anti-dumping legislation. Moreover, the Indonesian government is looking to impose duties of up to 200 percent on Chinese imports. It has already banned e-commerce firm Temu over fears that its small enterprises could be destroyed.

Meanwhile, Temu suspended operations in Vietnam in December 2024, amid a crackdown on e-commerce platforms. In Thailand, 58 products, including steel and furniture, have been identified as targets for anti-circumvention duty. To manage low-cost imports and protect local manufacturers, Thailand introduced a seven percent VAT on imported goods below \$40. This has led to a 20 percent reduction in imports in this category, particularly from China.

In 2024, the US overtook China as Southeast Asia's largest export market. However, access to US markets is under greater threat under the current Trump administration. US decisions may give global companies more reasons to increase investment in Southeast Asia due to their stable and growing domestic markets, increasing income per capita, and business-friendly atmosphere towards all parties.

According to World Bank and IMF projections, ASEAN as a whole is likely to grow faster than China over the next three years due to its growing economies. Moreover, ASEAN economies have attracted Chinese overseas investment for a variety of reasons, including proximity, FTAs, historical relations, and Chinese support regarding new technology, capital, and trading partnership.

Despite the advantages, a high influx of Chinese goods into the Southeast Asian market will heavily affect local manufacturers, resulting in large-scale job losses and the shutdown of local infant industries, leading to trade friction with China. Therefore, with pressure from both superpowers (the US and China),



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should Southeast Asia be optimistic about its economic growth in 2025?

Source: thedailystar.net

### Bangladesh: Apparel exports to US rose 14% in FY25

Bangladesh's garment exporters registered the highest growth in shipments to the United States (US) in the just-concluded 2024-25 fiscal year, thanks to the shifting of work orders from other countries, mainly China.

Bangladesh shipped \$7.54 billion worth of apparel to the US in the last fiscal year, posting a 14 percent year-on-year growth.

With the spike, the share of exports to the US in overall garment shipments edged up nearly one percentage point to 19.18 percent year-on-year in FY25, according to the Export Promotion Bureau (EPB).

"Many American buyers increased sourcing from Bangladesh in the last fiscal year after shipments from Vietnam got stuck. US trade tensions with China also made some buyers source from us," said Shams Mahmud, managing director of Shasha Denims Ltd, a leading apparel exporter.

In FY25, woven garments accounted for the majority of the shipments to the US, the single biggest market for Bangladesh. Exports of woven items grew 13 percent year-on-year to \$4.94 billion in FY25. But knitwear makers' exports soared 15 percent year-on-year to \$2.59 billion during the period. Overall, Bangladesh sent over \$39 billion worth of apparel in FY25, posting nearly a 9 percent growth. The European Union (EU) bought half of the garments sold by the South Asian country, the world's second-largest apparel exporter after China. In FY25, garment exports to the EU expanded 9 percent year-on-year to \$19.7 billion. Within the EU market, where Bangladesh's goods get duty-free entry, Germany was the biggest destination, followed by Spain, France, and the Netherlands, according to EPB data.

Apart from the US and EU, the UK, Canada, and Japan were the largest markets for apparel in the last fiscal year. Mohiuddin Rubel, managing director of Bangladesh Apparel Exchange, an initiative to promote local apparel and textiles, said that since the onset of Covid-19, the global landscape has taken unexpected turns, presenting a cascade of new challenges each day. "Our performance remains robust in the traditional markets, boasting an impressive 84 percent share of our total apparel exports. However, the non-traditional market tells a different story, with our current stake standing at a modest 16 percent." Exporters define the EU, US, UK, and Canada as traditional markets, while the rest—including Japan, Australia, and India—as non-traditional ones.

According to the EPB, Bangladesh's RMG exports to non-traditional markets increased 6 percent year-on-year to \$6.44 billion in FY25. Rubel said the US economy recovered faster than the EU. Besides, US purchases from China declined, which benefitted Bangladesh. "We invested in factories and compliance. Now, a lot depends on the resolution of the tariff issue with the US," he said, referring to the government's negotiation with the Trump administration over its plan to

impose a 35 percent tariff on Bangladesh's exports. Mahmud said the worst-affected countries would focus on the EU markets because of Trump's tariffs.

"So, there will be a knock-on effect, and a price war may unfold in the EU market," he said. "In the US, consumer demand is likely to shrink due to the higher import cost. A price war is also likely in the American market."

Bangladesh has positioned itself as a reliable sourcing hub by investing in workplace safety and sustainability, said Tanvir Ahmed, managing director of Envoy Textiles. "Our cost-efficiency, capacity to handle large-volume orders, and improvements in compliance made a strong case for US brands looking to diversify." In January 2025 alone, exports to the US surged nearly 46 percent year-on-year, reflecting a strong recovery from a low base in early 2024 and renewed confidence among retailers, he said. Buyers facing pressure to maintain competitive pricing also favoured Bangladesh, given its low production costs and readiness to supply both woven and knit apparel at scale, he added.

Source: thedailystar.net

### Trump Hits Canada with 35% Tariffs

Following a trickle of trade revelations this week, President Donald Trump announced Thursday evening that he intends to levy 35-percent duties on the nation's northern neighbour beginning Aug. 1.

The president's letter to Canadian Prime Minister Mark Carney revived a familiar complaint about Canada's "failure to stop the drugs"—fentanyl—from flowing into the United States, a sticking point for Trump that pushed the escalation of trade tensions between the two countries earlier this year. Trump also decried Canada's retaliation against U.S. tariff threats with its own duties, as well as its steep tariffs on American agricultural products.

Like other letters released since Monday, the missive included a warning against the transshipment of goods from other countries. Trump wrote that if Canada decides to implement its own duties on the U.S., that tariff rate will be stacked upon the 35 percent announced this week.

The European Union also appears to be in the president's crosshairs once again, as a deal has yet to be reached with the 27-member trade bloc despite repeated and increasingly desperate overtures from European Commission President Ursula von der Leyen and other European trade officials. On Thursday evening, Trump told NBC News that he plans to impose blanket duties on most nations that haven't yet reached a consensus with U.S. trade negotiators. "We're just going to say all of the remaining countries are going to pay, whether it's 20 percent or 15 percent. We'll work that out now," he said. He added that he believes the tariffs have been well-received thus far, pointing to stock market performance, which closed at record highs on Thursday.

However, S&P 500 futures slipped 0.5 percentage points following the president's evening announcement.

Source: sourcingjournal.com



## Trade Update



### Cotton body CAI sees higher opening stocks for next season at 55.5 lakh bales

Closing stocks of cotton in the country for the current 2024-25 season ending September are estimated to be around 55.59 lakh bales (of 170 kg each) — about 84 per cent higher than the corresponding previous year's 30.19 lakh bales, per trade body Cotton Association of India (CAI)'s latest estimates.

In a statement, CAI President, Atul Ganatra said the cotton pressing numbers for the 2024-25 season is estimated at 311.40 lakh bales — higher than its previous estimate of 301.14 lakh bales on higher crop size.

#### Higher pressing

The increase is attributed to higher than estimated pressing of the fibre crop in Maharashtra (5 lakh bales), Gujarat and Telangana at 1.5 lakh bales each and 1 lakh bales in Karnataka. Andhra Pradesh, Haryana and Rajasthan have also witnessed a marginal increase in pressing numbers on improved crop arrivals.

CAI estimates the total cotton supply till end June at 356.76 lakh bales, which consists of pressings of 296.57 lakh bales, imports of 30 lakh bales and opening stock of 30.19 lakh bales. Consumption till end-June stood at 233.5 lakh bales, while exports were estimated at 15.25 lakh bales.

Stocks at the end of June 2025 is estimated at 108.01 lakh bales. This includes 32.00 lakh bales with textile mills and the remaining 76.01 lakh bales with CCI, Maharashtra Federation and others (MNCs, traders, ginners, exporters, etc) including cotton sold but not delivered.

#### Output rises

CAI has estimated the total cotton supply till end of the cotton season 2024-25 at 380.59 lakh bales against the earlier projection of 370.34 lakh bales on higher production in some States.

Domestic consumption for the season is seen marginally higher at 308 lakh bales against the earlier projection of 305 lakh bales, while exports are projected at 17 lakh bales. In fact, the exports are seen lower by 40 per cent this season over corresponding last year's 28.36 lakh bales.

Imports of cotton for 2024-25 are pegged at 39 lakh bales, more than double the previous year's estimates of 15.2 lakh bales. Till June end, about 30 lakh bales are estimated to have arrived at the Indian ports, CAI said.

Meanwhile, the sowing of cotton has been progressing well in the key producing States. Till July 7, the fibre crop has been sown on around 79.54 lakh hectares (lh), marginally higher than 78.58 lh a year ago, per Agriculture Ministry data.

Source: thehindubusinessline.com

### India and Brazil set to sign key agreements to boost bilateral trade

India and Brazil, both wary of the tariffs that US President Donald Trump has threatened to impose, and looking beyond America for markets for their respective produce, are set to sign almost half a dozen agreements aimed at increasing their

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bilateral trade during Prime Minister Narendra Modi's meeting with Brazilian President Luiz Inacio Lula da Silva. At the time of writing of this report, the meeting was ongoing.

India's trade with Brazil is the largest compared to its trade with any other country in Latin America. However, it is far below Brazil's trade with China, the US, Argentina, and Germany. India-Brazil bilateral trade had reached \$16.6 billion in 2022-23, and following the drop in oil and gas prices, it is now around \$12.2 billion.

India enjoys a trade surplus as it exports goods worth \$6.7 billion to Brazil and imports goods worth \$5.4 billion. Modi and Lula set a bilateral trade target of \$20 billion during their last meeting in November 2024. Brazil is looking to diversify exports to India beyond sugar and crude oil that dominate current sales. Earlier this year, Brazil's Embraer SA, the world's third-largest aircraft manufacturer, set up a subsidiary in India. Brazil is also looking at finding a market in India for its agricultural and dairy products.

At a recent event, Lula observed that he only recently discovered that Modi, a devout Hindu, didn't eat meat. Brazil is the world's topmost beef exporter. "Our trade relationship is just \$12 billion, it's nothing," Lula said. "So please, arrange a box of cheese. I want it on the table, so he (Modi) never complains about Brazilian food and, who knows, maybe he'll start buying Brazilian cheese," Lula added.

Hours before he met the Indian PM in Brasilia for a bilateral meeting on Tuesday evening (India time), Lula joined his South African counterpart Cyril Ramaphosa in criticising Trump for his threat to slap extra tariffs against Brics member countries. On the final day of the two-day Brics Summit, which Brazil had hosted, Lula said the US President was "irresponsible for threatening tariffs on social media". He also called on world leaders to find ways to reduce international trade's reliance on the dollar.

Earlier, South African President Ramaphosa was the first among the Brics leaders to criticise Trump for his comments where the US President had warned Brics members of 10 per cent additional tariffs for adopting policies he said were "anti-American".

In their Rio de Janeiro declaration, Brics members expressed "serious concerns" over tariffs, slammed soaring defence spending, and condemned airstrikes on Brics member Iran, but the group did not mention the US by name. The grouping also tasked its finance ministers and central bank governors to continue the discussion on the Brics Cross-Border Payments Initiative, and appreciated the progress made by the Brics Payment Task Force (BPTF) in identifying possible pathways to support the continuation of discussions on the potential for greater interoperability of Brics payment systems. The effort has been to reduce the dominance of the US dollar in international trade.

Brazil is also keen to increase its sesame exports to India, which have grown significantly since the Indian market opened to Brazil in 2020. It is also eyeing expanded ethanol exports. In Brasilia, the two countries are expected to ink deals on





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renewable energy, counter-terrorism, and cooperation on agricultural research, and agree on a framework to protect confidential information.

India is looking at increasing its cooperation with Brazil in oil & gas, mining and critical minerals, defence and security. The two leaders are expected to discuss ways to strengthen and diversify bilateral trade, including through expansion of the India-MERCOSUR Preferential Trade Agreement as Brazil is holding the chairship of MERCOSUR from July 1, 2025. MERCOSUR stands for Mercado Común del Sur, which translates to Southern Common Market. It's a South American regional trade bloc and economic integration initiative.

Source: business-standard.com

### India should avoid rushing for trade agreement with US, say experts

India should avoid rushing into a trade deal with the US that compromises core sectors like agriculture, experts on Sunday said, cautioning that Washington is not sparing even its key partners like the EU.

The US has shot off letters to 24 countries and the European Union (EU) imposing tariffs that are as high as 50 per cent on Brazil. On its key trading partners like the EU and Mexico, 30 per cent duties have been proposed from August 1.

Economic think tank GTRI (Global Trade Research Initiative) said India must recognise that it is not alone in facing US pressure.

The US is currently negotiating with over 20 countries and seeking concessions from more than 90.

"Yet most are resisting because they see these MASALA (Mutually Agreed Settlements Achieved through Leveraged Arm-twisting) deals for what they are politically driven, transactional demands offering no lasting trade certainty," GTRI Founder Ajay Srivastava said.

He added that both the EU and Mexico are major trade partners of the US, and Washington can impose tariffs on them to pressure them into quick deals, India cannot expect a balanced deal.

Another trade expert said India should tread cautiously while negotiating the trade pact with the US.

The expert added that Trump's trade threat is rapidly losing credibility as despite more than three months of pressure, only two countries -- the UK and Vietnam -- have agreed to the USA's one-sided terms.

From Japan and South Korea to the EU and Australia, countries are resisting Trump's trade deals that demand tariff cuts without reciprocal US concessions, mandate guaranteed purchases of American goods, and leave the door open for future tariffs even after a deal is signed, the GTRI said.

A team of Indian trade negotiators will soon visit Washington to further talks for the proposed Bilateral Trade Agreement (BTA).

"India should stay the course and avoid trading away core sectors like agriculture. A hasty deal under pressure could have irreversible consequences, especially when such agreements may not survive the next shift in US politics," Srivastava said.

Source: business-standard.com

### SEZ amendment Bill may be taken up in monsoon session of Parliament

The Special Economic Zone (SEZ) Amendment Bill — to overhaul the existing two-decade old law — is likely to come up in the monsoon session of Parliament.

Prior to this, the commerce department is set to seek approval of the Union Cabinet for the new Bill to modernise India's SEZ framework.

The proposed changes in the law have been designed to align with the emerging order of global trade, attract investment and boost local manufacturing, a person aware of the matter said.

One of the changes in the existing law aims to allow the sale of products manufactured in SEZs to the domestic market. This would be on a 'duty foregone basis' on raw materials, instead of finished products. At present, SEZs pay full Customs duty, in case a finished product is sold outside these zones, known as domestic tariff area (DTA).

The Bill will allow 'reverse job work'. This means that SEZ units will be able to do a part of the manufacturing process for DTA units.

With the introduction of 'reverse job work', the manufacturers will be able to tackle the seasonality in export demand.

"Both these changes will boost manufacturing, create employment and attract investments. The changes will also see optimum utilisation of idle capacity, considering that the export market can be unpredictable and demand can fluctuate. There has also been long-standing demand from the industry on these issues and they are also prevalent across the world," the person cited above told Business Standard.

Another change will be to allow local companies to make payment in Indian currency in case services are availed from SEZ units.

Under the existing law, payment for services is to be made in foreign exchange. The amendment will make services at par with the manufacturing sector.

Once the Bill gets the nod of the Cabinet, the plan, thereafter, is to introduce it in the monsoon session of Parliament slated to begin next week. Once passed by Parliament, the new law will replace the existing SEZ Act, 2005, the person said.

SEZs are areas within the country that have different economic regulations and are considered a foreign territory, with primary focus on promoting exports and attracting investments.

The SEZ (Amendment) Bill has been in the works for over two years. The government believes that its performance has not been up to the mark and has not attracted investments in manufacturing.

The changes will also enable easier integration of SEZs with the domestic market. So, firms in SEZs will not lose out due to restricted market access.

During FY25, exports from SEZs grew 7.4 per cent year-on-year to \$172.3 billion, according to government data.

Source: business-standard.com



## Trade Update



## China's Boost and India's Drag - A Critical Perspective of the Textile Industry

Two hundred years ago, China and India were economic giants, together controlling nearly 70% of global wealth. Both nations dominated the global cotton and silk markets, accounting for approximately 90% of the world's consumption of these textiles, and collectively hoarded 70% of the world's gold reserves. This economic supremacy was built on centuries-old artisanal and agricultural traditions, with textiles serving as a cornerstone of their economies and cultures.

However, the Industrial Revolution, which began in Britain in the late 18th century, introduced new technologies and production methods that dramatically reshaped global economic power.

Mechanized textile manufacturing, steam power, and scientific advancements accelerated productivity and trade, transforming economies worldwide. Unfortunately for China and India, these changes initially left them behind. While Western nations industrialized rapidly, both Asian giants experienced stagnation and decline relative to the West.

Starting in the 1980s, however, China began to harness the forces of globalization and economic reform to fuel rapid growth and industrialization, especially in manufacturing and textiles. India's path diverged significantly, shaped by distinct political choices, social factors, and approaches to integration with the global economy.

Understanding this divergence requires examining the underlying political and social "drags" each country faced, particularly through the lens of their textile industries, which offer a microcosm of broader economic trends.

### POLITICAL DRAG

China's transformation was set in motion in 1978 when Deng Xiaoping launched market-oriented reforms. Despite its communist label, China's government pragmatically adopted capitalist tools, introducing market incentives within a single-party authoritarian framework. This political structure allowed China to implement sweeping reforms rapidly and consistently, unimpeded by electoral cycles or political opposition.

Key reforms included the establishment of modern financial institutions, creation of Special Economic Zones (SEZs) that attracted foreign investment and technology, and explicit government policies encouraging light manufacturing industries. Additionally, China leveraged proximity to Hong Kong, Taiwan, and Japan to attract significant Foreign Direct Investment (FDI), which brought capital, technology, and managerial expertise. The state's firm control also enabled the rapid mobilization of resources, large-scale infrastructure development, and streamlined decision-making.

India, in contrast, embraced democracy with independence in 1947 but adopted a heavy socialist economic framework, emphasizing self-sufficiency and state control over key industries. The democratic system—while fostering political freedoms and pluralism—also introduced complexities. Diverse interests, regional politics, coalition governments, and a free press often slowed policymaking.

Economic reforms, especially those requiring labor market flexibility or dismantling entrenched subsidies, faced political resistance. It was only in the early 1990s that India undertook significant liberalization, triggered by a balance of payments crisis, moving towards privatization and opening to foreign investment.

However, critical reforms in labor laws, land acquisition, and the judiciary remained slow or incomplete due to political

sensitivity in the world's largest democracy, where elected officials often prioritize short-term electoral gains. The slower pace of reform and political uncertainty hindered India's ability to capitalize fully on globalization and technological change.

### SOCIAL DRAG

Social and cultural factors played a profound role in shaping economic outcomes. India's incredible diversity in religion, language, and culture created social complexities that sometimes hindered unified policy implementation. The need to accommodate multiple communities and protect cultural practices led to inertia and resistance to disruptive reforms.

Globally, many countries that underwent radical and rapid economic reforms had relatively centralized or authoritarian political systems that could suppress opposition groups resisting change. Examples include Lee Kuan Yew's Singapore, Soeharto's Indonesia, Emperor Meiji's Japan, Chiang Kai-shek's Taiwan, Park Chung's Korea, Atatürk's Turkey, the Shah of Iran, Bismarck's Germany and Deng Xiaoping's China. These leaders were often able to push reforms forward decisively, overcoming entrenched interests opposed to modernization.

India faced resistance from two powerful groups: socialist ideologues advocating state control and religious groups wary of modernization's social disruptions. The coexistence of these groups created a formidable drag on reforms, especially those related to science, technology, and labor productivity. Economic progress requires critical thinking and a scientific outlook, which can be constrained by religious orthodoxy or superstition.

As Robert Kaplan, a Geopolitical think tank in his book, "Revenge of Geography" puts it. "In religiously or ideologically intense societies, liberal democracy can be fragile without centralized authority". Authoritarian regimes sometimes stabilize such societies better than weak democracies—not as an ideal, but as a pragmatic necessity.

For instance, approximately 10% of Nobel laureates identify as atheists, reflecting a potential link between secularism and scientific advancement. Christianity's historical progression from orthodox structures to more reformed and secular versions helped many Western countries embrace industrialization. Similarly, Buddhism—an atheistic philosophy—spread widely in East Asia, influencing China and Japan's openness to modernization and reform. India's multitude of religions, each with strong cultural influence, may have complicated societal shifts toward science and technology.

This dynamic can also be observed in economic comparisons between Catholic and Protestant countries in Europe and North America, where more religiously reformed societies often exhibit higher innovation and growth rates.

### THE COLONIAL DRAG

India's prolonged colonization under British rule left a complex legacy that continues to shape its political, economic, and administrative systems. While colonial rule introduced modern institutions—such as the English language, Western education, legal frameworks, and the banking system—it also entrenched deep-seated structural and social disparities. The British leveraged existing caste and community divisions, institutionalizing them further, thereby worsening socio-economic inequalities that persist to this day.

One of the most enduring legacies of British colonialism was the bureaucratic system, which, though instrumental in



# China's Boost and India's Drag - A Critical Perspective of the Textile Industry



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building an administrative structure, instilled a rigid, process-oriented mindset. This “rule-bound” governance culture often prioritizes procedural correctness over outcomes, making “means more important than ends.” In contrast, the American system, which evolved independently from its British colonial roots, embraced a more pragmatic, results-driven approach. The U.S. Constitution provides significant executive powers to the President, including executive orders that allow for swift policy implementation without prolonged legislative delays. This has been pivotal in times of national transformation—during the New Deal under Franklin D. Roosevelt, Reagan-era deregulation, and even during Trump’s protectionist policies.

This executive pragmatism shares some functional similarities with China’s centralized authoritarian model, where decision-making is streamlined and less burdened by pluralistic contestation. China’s rise over the past four decades can partly be attributed to this model—characterized by long-term planning, rapid policy execution, and reduced institutional friction.

In contrast, India’s democratic system, layered with diverse ideological, linguistic, religious, and caste-based identities, presents a far more complex environment for policy consensus and reform. Democratic contestation, coalition politics, and judicial activism often delay or dilute reforms, even when there is strong economic rationale. This, coupled with a bureaucratic culture inherited from colonial governance, has constrained India’s ability to move at the pace required for transformational growth.

While democracy ensures representation and protects rights, it also makes bold, unpopular decisions politically costly. The challenge for India, therefore, lies in reconciling its democratic plurality with the efficiency of policy execution, and moving from a rule-obsessed system to one that values governance outcomes as much as, if not more than, the processes that underpin them.

## EFFECT OF DRAG ON THE INDIAN TEXTILE INDUSTRY

The textile industry has ancient roots in both India and China and serves as a key example of how political and social factors impacted economic outcomes. England’s Industrial Revolution famously mechanized textile production, propelling the country to global leadership. India, however, clung to its traditional handloom industry, which became a powerful symbol of self-reliance and anti-colonial nationalism during the freedom movement.

While noble in intent, the promotion of handlooms came with significant economic drawbacks. The sector was characterized by high production costs, low scalability, limited innovation, and heavy reliance on government subsidies. Despite these inefficiencies, political and cultural forces sustained protectionist policies, impeding India’s integration into the global textile value chain.

In contrast, China decisively discarded inefficient handloom sectors, embracing mechanization, scale economies, and export-led growth. China’s government provided targeted support to industries with global competitiveness, quickly scaling production capacities and adopting new technologies. This shift was facilitated by its political system’s ability to enact disruptive changes without the gridlock of electoral politics.

India’s protectionism created a paradox: while shielding

traditional sectors, it perpetuated low productivity and limited employment growth. Furthermore, moving away from protectionism would have caused short-term unemployment and labor unrest, politically risky in a democratic context where voter support is critical.

## DIFFERENCES IN WORK

### PHILOSOPHY AND TECHNOLOGY ADOPTION

These political and cultural differences also manifested in workplace attitudes and technology adoption:

- **Outcome vs. Task Orientation:** Chinese workers tend to focus on outcomes and results, while Indian workers often emphasize completing tasks or processes.
- **Proactivity vs. Reactivity:** Chinese work culture emphasizes proactive problem-solving; Indian culture tends to be more reactive, responding to issues as they arise.
- **Automation and Digitalization:** Automation is widely adopted and standardized in Chinese industries, whereas in India, it often remains optional or limited to select sectors. China’s embrace of digital technologies and smart manufacturing outpaces India’s more cautious adoption.
- **Collectivism vs Individualism:** While collectivism breeds coherence, it may suppress dissent. Individualism fosters diversity and innovation, but may hamper national coordination.
- Such cultural and systemic differences contribute to efficiency gaps and global competitiveness disparities, especially in labor-intensive industries like textiles.

## CONCLUSION

Critics often attribute China’s economic rise to government subsidies and its communist regime. Indeed, China provided substantial initial subsidies to build capacity. However, it swiftly complemented subsidies with modernization efforts, productivity improvements, technology adoption, and effective know-how transfer, enabling sustained competitiveness. China’s political will, social cohesion, and openness to reform facilitated its rapid transformation into a manufacturing powerhouse and global textile leader.

India, by contrast, has yet to overcome deep-rooted political, social, and cultural challenges that slow reform and technological progress. The handloom industry’s persistence, combined with protectionism and democratic politics that prioritize stability over disruption, constrained India’s growth trajectory.

To close the gap, India must address labor and legal reforms, foster innovation, eliminate protectionism and accelerate digital and automation adoption. Balancing democratic freedoms with economic efficiency remains a complex challenge but is critical for India to realize its vast economic potential, especially in sectors like textiles that have historically defined its economy.

(The opinions and observations expressed in the above Article are those of author)



TEXPROCIL

THINK COTTON, THINK INDIA!

[www.texprocil.org](http://www.texprocil.org)





TEXPROCIL team had a productive meeting with Ms. Alison Ward (CEO), CottonConnect and her team – Mr. Kinnar Lakhani and Mr. Selvin to discuss a potential collaboration as a Training Channel Partner for the “Kasturi Cotton Bharat” Brand on 10th July 2025 at the TEXPROCIL.



**Purpose of Meeting:** To operationalize the MoU signed between TEXPROCIL and CottonConnect to promote Kasturi Cotton Bharat (KCB) by aligning Farm and Gin level activities with quality standards, sustainability, and traceability.

During the meeting, the following points were discussed:

- **To provide awareness trainings to Farmers:**
  - ✓ During the process, CottonConnect will be identifying 1,000 Farmers who are already into ongoing sustainability programs & associate them with the Kasturi Cotton Bharat initiative.
  - ✓ TEXPROCIL will join the existing pre-sowing to harvesting & post-harvest training modules and provide awareness material in local languages for the targeted extension activities.
  - ✓ TEXPROCIL and CottonConnect to visit the fields jointly and organise focused group training sessions with 50-100 Farmers per batch and will also carry out area mapping with the sustainable farms certified with BCI & Regenerative programs.
  - ✓ CottonConnect can be a proud collaborator of the brand ‘Kasturi Cotton’ and pilot Kasturi Cotton through their existing sustainable programmes, such as REEL Cotton/REEL Regenerative/Organic programmes, using their on-ground presence across multiple locations in India and through their network of local partners and Gins across India.
- **Identification of areas where CottonConnect farmers could grow sustainable Kasturi Cotton:**
  - ✓ Extra-Long Staple (ELS) cotton varieties are primarily grown in a few regions of India where the climate and soil conditions are suitable which are used in premium textiles like fine fabrics and high-quality yarns. The major ELS cotton growing states in India include:
    - 1) Tamil Nadu
 

Districts: Coimbatore, Salem, Perambalur, Trichy, Madurai, and parts of Virudhunagar

Varieties: Suvin, MCU-5, and TCH series

Tamil Nadu is one of the leading producers of ELS cotton in India, with a significant portion cultivated under irrigation.
    - 2) Karnataka
 

Districts: Dharwad, Haveri, Raichur, Ballari, and Gadag

Varieties: DCH-32, Suvin

ELS cotton is grown under both irrigated and rainfed conditions in Karnataka.
    - 3) Andhra Pradesh & Telangana
 

Districts: Guntur, Prakasam, Krishna, and Warangal

Varieties: MCU-5, Suvin, and hybrid ELS varieties

The region is known for high-quality cotton, particularly in irrigated areas
    - 4) Madhya Pradesh
 

Districts: Khargone, Khandwa, and Dhar

Varieties: Varalakshmi, DCH-32

Mostly grown in black soil regions under irrigation.

## Meeting with Cotton Connect



**Kasturi Cotton Bharat**

### 5) Maharashtra

Districts: Nagpur, Wardha, and parts of Vidarbha

Varieties: DCH-32 and ELS hybrids

Some ELS cotton is grown in irrigated farms, though the area under cultivation is limited. Mostly focused on medium-staple and long-staple cotton.

### 6) Gujarat

Districts: Vadodara, Surendranagar, Chota-Udaipur, Narmada

Varieties: Shankar-6

Mostly medium-staple cotton grows in these regions

### • Ginner Capacity Building

- ✓ To organise training programme for 30 Ginners per phase in the cotton growing clusters. Provide a platform for information dissemination via series of training & workshops.
- ✓ CottonConnect will support to identify eligible Ginners who are already using their evaluation scorecard comprised of infrastructure, safety, compliance, etc.

In view of the above, it was decided to organise the activities with a specific timeline by assigning the task responsibilities as following:

- ✓ The CottonConnect will finalise pilot locations and identify farmers and share awareness materials in digital and physical modes widely. Also, CottonConnect will register Ginners.
- ✓ TEXPROCIL and CottonConnect to organise Farmers and Ginners training programmes jointly.
- ✓ Connecting the ongoing CottonConnect private programs like Reel standard, BCI, Organic programs and also connect Kasturi Cotton with the existing CottonConnect brands like Primark, C&A, CARREFOUR, MARKS.

### Conclusion:

Both parties reaffirmed commitment to scale Kasturi Cotton through Structured Collaboration, Integrating Awareness, Training, and Certification Programs. A follow-up review is planned post phase-1 to assess impact and expansion potential.

## Meeting with CU Inspections & Certifications India Pvt. Ltd. at TEXPROCIL H.O.

The leadership team of CU Inspections & Certifications India Pvt. Ltd. visited the TEXPROCIL office on Tuesday, 15th July 2025 for a discussion on collaborative opportunities.

The primary agenda of the meeting was to:

- ✓ Deliberate on the future plans of the GCC (General Certificate of Conformity) program.
- ✓ Explore potential areas of collaboration under the Kasturi Cotton Bharat program.
- ✓ Address specific queries related to implementation, technical parameters, and stakeholder outreach.

The CU delegation comprised the following representatives: Mr. Dirk Teichert – APAC Head, PCU Group Dr. Binay Kumar Choudhury - Regional Technical Lead, APAC Mr. Naveen Singh – Business Development Manager - Textile (Asia).



The meeting was attended by the TEXPROCIL team and focused on aligning mutual objectives and identifying synergies that could strengthen the Indian cotton value chain through sustainable and traceable practices.



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# The Finest Indian Cotton is here!

Kasturi Cotton provides the entire cotton value chain the assurance of the best of Indian cotton across a wide range of staple lengths.

## THE KASTURI COTTON RANGE

Name/ Parameter	Kasturi Cotton 28 mm+	Kasturi Cotton 29 mm+	Kasturi Cotton 30 mm+	Kasturi Cotton 31 mm+	Kasturi Cotton 32 mm+	Kasturi Cotton 33 mm+	Kasturi Cotton 34 mm+	Kasturi Cotton 35 mm+
Staple Length/ UHML	28mm+	29mm+	30mm+	31mm+	32mm+	33mm+	34mm+	35mm+
Micronaire Value	3.7 to 4.7	3.7 to 4.5	3.7 to 4.5	3.7 to 4.5	3.0 to 4.2	3.0 to 4.2	3.2 to 4.2	3.0 to 4.0
RD Value	76+	76+	76+	76+	73+	73+	74+	74+
Fibre Strength	29.0 (-1.5) g/tex	29.5 (-1.5) g/tex	30.5 (-1.5) g/tex	32.5 (-1.5) g/tex	35.0 (-1.5) g/tex	36.0 (-1.5) g/tex	36.5 (-1.5) g/tex	37.5 (-1.5) g/tex
Uniformity Index	83% or more	83% or more	84% or more	84% or more	83% or more	83% or more	85% or more	85% or more
Trash	2% or below	2% or below	2% or below	2% or below	2% or below	2% or below	3% or below	3% or below
Moisture Content	8% or below	8% or below	8% or below	8% or below	8% or below	8% or below	8% or below	8% or below

**The Kasturi Cotton Promise:**

- **Assured product quality:** Reliable and consistent cotton fibre makes for superior finished products.
- **Authenticity:** Genuine Indian cotton that meets the Kasturi Cotton specifications.
- **End-to-end traceability:** Transparency throughout the supply chain.
- **Sustainability:** Responsibly farmed cotton that supports eco-friendly practices.

**Why buy Kasturi Cotton?**

- **Enhanced product performance:** Finished products are softer, stronger, more durable, and exhibit superior colour vibrancy, assuring excellence in every thread.
- **Supply chain transparency:** Kasturi Cotton's blockchain-based KC Track platform ensures complete traceability from origin to finished product.
- **Consumer trust:** Builds confidence and preference by adhering to compliance and sustainability standards.
- **Informed decision-making:** Offers unparalleled insights into the supply chain for better business outcomes.





## Promote Your Merchandise / Services Advertise with Us!



Email: [info@texprocil.org](mailto:info@texprocil.org)



Get in touch with us, Now!

Website: [www.texprocil.org](http://www.texprocil.org)



### Advertisement Package for promoting products and solutions in the Publications of TEXPROCIL

Dear Madam/Sir,

As a part of TEXPROCIL's knowledge sharing initiatives, the Council is coming up regularly with various E-publications. The circulation of these publications, averaging to over 3000 avid readers, includes the Council's strong database of 2,000 nos. membership comprising manufacturers, exporters, traders of Indian cotton fibre, yarn, fabrics and madeups range of products.

The readership database also includes the contacts of textiles trade associations, government representatives, foreign missions, etc. which are being updated from time to time.

The Council has planned to offer an 'Advertisement Package' for the various Publications with a view to enhance the exposure of products and solutions being offered by various entities. We request you to kindly consider the advertisement opportunity as per details attached.

Publication details are as follows:

1. **Newsletter** - Published every fortnight

2. **IBTEX** - Published daily - Includes news clippings on articles of interest in T&C appearing in various publications.

Advertisement Package details are given below this column.

For further clarifications you may like to advise your office to kindly write to Mr. Rakesh Chintal, IT Officer/ Mr. Rajesh Satam, Joint Director on email: [rakesh@texprocil.org](mailto:rakesh@texprocil.org) / [rajesh@texprocil.org](mailto:rajesh@texprocil.org).

For queries related to advertisement booking kindly write to Mrs. Mrunal Sawant on email: [mrunal@texprocil.org](mailto:mrunal@texprocil.org).

We look forward to receiving your enquiries / confirmation for availing the advertisement opportunity in publications of TEXPROCIL.

Regards,

Dr. Siddhartha Rajagopal  
Executive Director

:: TEXPROCIL ::

#### ADVERTISEMENT PACKAGE (For Advertisement in TEXPROCIL E-PUBLICATIONS)

##### TEXPROCIL E-NEWSLETTER (FORTNIGHTLY)

Ad. Option	One Issue	Six issues	Twelve Issues	Twenty Four Issues ( BEST OFFER )
Double Spread	Rs. 12,000	Rs. 61,200	Rs. 1,15,200	Rs. 2,16,000
Quarter Page	Rs. 2,000	Rs. 10,200	Rs. 19,200	Rs. 36,000
Half Page	Rs. 3,000	Rs. 15,000	Rs. 28,500	Rs. 54,000
Full Page	Rs. 5,000	Rs. 25,500	Rs. 48,000	Rs. 90,000

##### IBTEX E-NEWS CLIPPINGS (DAILY)

Ad. Option	Three Months	Six Months	Twelve Months	Twenty Four Months ( BEST OFFER )
Click-on-Logo	Rs. 15,000	Rs. 25,000	Rs. 50,000	Rs. 90,000

For more information  
please contact:

**Rajesh Satam**  
Joint Director

**The Cotton Textiles  
Export Promotion**

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T. 91-22- 49444000

Email  
[rajesh@texprocil.org](mailto:rajesh@texprocil.org)

Website  
[www.texprocil.org](http://www.texprocil.org)

## Trade Notification



## Membership Renewal Subscription Fee for FY 2025-2026

Dear Member,

The Annual Renewal Subscription for the financial year 2025-2026 shall become due for payment on **1st April 2025**.

The Annual Renewal membership fees is as follows:

- 1) Associate Members : Rs. 8000/- + 18% GST = **Rs. 9440/-**
- 2) Ordinary Member : Rs. 14000/- + 18% GST = **Rs. 16520/-**

**Exporters who wish to renew their membership for 3 years and 5 years are eligible for Special Discount of 10% and 15% respectively. This will be applicable w.e.f. 01.04.2025 only.**

	Membership Fees		Discount	Discounted Fees		Benefit to Exporters	
	Associate	Ordinary	Slab	Associate	Ordinary	Associate	Ordinary
For 3 years	24,000	42,000	10%	21,600	37,800	<b>2,400</b>	<b>4,200</b>
For 5 years	40,000	70,000	15%	34,000	59,500	<b>6,000</b>	<b>10,500</b>

(Please note that 18% GST will be applicable on membership fees.)

Membership Renewal for 3 years including GST will be as follows:

Associate Member – Rs. 21600/- + 18% GST = Rs. 25488/-

Ordinary Member – Rs. 37800/- + 18% GST = Rs. 44604/-

Membership Renewal for 5 years including GST will be as follows:

Associate Member – Rs. 34000/- + 18% GST = Rs. 40120/-

Ordinary Member – Rs. 59500/- + 18% GST = Rs. 70210/-

Introducing a new category for small exporters:

Besides, in order to encourage small exporters and enable them to avail of the Council's services, the Committee of Administration of TEXPROCIL has decided to introduce a new category for Associate Members who are MSMEs with exports of less than Rs. 15 lakhs (or Nil Exports) in the previous financial year i.e. 2024-2025. Below is the Membership Renewal fee for such category:

Renewal – Associate Member – Rs. 2000/- + 18% GST = **Rs. 2360/-**

**Note:**

1. A Self-attested UDYAM REGISTRATION CERTIFICATE for F.Y. 2024-2025 is required
2. Self-Declaration for the export figures of the previous financial year i.e. 2024-2025 on the company letterhead duly stamped and signed by the partner or directors of the firm/company would also be required. (Format is enclosed and no other format will be accepted).
3. The new entrants who are falling under the above category will be charged Rs. 2950/- (Entrance Fee as Rs. 500/- + Annual Membership Fee as Rs. 2000/- + 18% GST).

**Kindly ignore this email, if you have already renewed your membership for the year 2025-2026.**

### AMENDMENT OF e-RCMC

A nominal charge of Rs. 1000/- per amendment, excluding GST will be levied w.e.f. 01.04.2025.

#### SELF-DECLARATION

(To be submitted on the **Firm/Company Letterhead**)

#### TO WHOMSOEVER IT MAY CONCERN

This is to certify that M/s. \_\_\_\_\_ (Name and full address of the Firm/Company) having IE code No. \_\_\_\_\_, GST No. \_\_\_\_\_ have exported Cotton / Cotton Yarn / Cotton Fabrics / Cotton Madeups (Excluding Handloom Items / Readymade Garments and Silks, etc.) during the financial year 2024-2025 as under:

Sr. No.	Description	2024-2025 [Rs. FOB value]
1	Cotton	
2	Cotton Yarn	
3	Cotton Fabrics	
4	Cotton Madeups	
	<b>TOTAL</b>	

I hereby declare that the information related to this disclosure is complete and best to my knowledge and none of the above information is false or misrepresented and it is supported by financial statements & documents.

(Firm / Company Stamp)  
(Signature of Proprietor / Partner / Director)

Date:  
Place:



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BCI

Sedex



Salona  
Group

SPINNING YARN TO PERFECTION



#### RING SPUN YARN

(Carded and Combed)

- 100% Cotton
- Ne 20/1 - Ne 60/1
- Ne 20/2 - Ne 40/2
- Knitted and Weaving Yarns



#### RING SPUN COMBED COMPACT YARN

(Carded and Combed)

- 100% Cotton
- Ne 20/1 - Ne 60/1
- Ne 20/2 - Ne 40/2
- Knitted and Weaving Yarns



#### ORGANIC YARN

- 100% Cotton
- Ne 20/1 - Ne 60/1
- Ne 20/1 - Ne 40/2
- Ne 6/2 - Ne 30/1
- Ne 6/1 - Ne 30/2
- Open and organic yarn Knitted & Weaving Yarns
- Ring spun organic



#### RECYCLE COTTON YARN

- BCI Recycle
- GOTS Organic + Recycle
- Convention + Recycle
- Ne 20/2 - Ne 32/2
- Ring spun - Ne 10/1 - Ne 40/1
- Open end - Ne 6/1 - Ne 30/1
- Knitted and Weaving Yarns



#### SLUB YARN

- 100% Cotton
- Ne 20/1 - Ne 40/1
- Knitted and Weaving Yarns



#### OPEN END YARN

- 100% Cotton
- Ne 10/1 - Ne 30/1
- Ne 6/1 - Ne 30/1
- Ne 6/2 - Ne 30/2
- Knitted and Weaving Yarns
- Recycled Cotton

## Sustainable Yarns, Ethically Made

Contamination Controlled & Contamination free.



#### SINGLE JERSEY

- Gauge - 20, 24, 28, 32
- Dia - 18 to 36



#### INTERLOCK/ DOUBLE KNIT

- Gauge - 24, 28
- Dia - 24 to 36



#### INTERLOCK/ DOUBLE KNIT

- Gauge - 24, 28
- Dia - 24 to 36



#### FLEECE 2/3 THREAD

- Gauge - 24
- Dia - 18 to 36



#### FRENCH TERRY

- Gauge - 20
- Dia - 18 to 36



#### FULL/MINI JA

- Gauge - 24, 28
- Dia - 30, 34

YARN COUNTS

KNITTED FABRIC

+91 9843071188 | +91 9843140133 | +91 7418701133

sales@salonagroup.com | www.salonagroup.com

9, Ramalinga Nagar, 4th Cross, Saibaba Colony, Coimbatore - 641011, Tamilnadu, India.





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For the best-in-class Indian cotton, look no further than Kasturi Cotton. With the assurance of consistent, standardised quality you can trust. Kasturi Cotton is backed by KC TRACK, our blockchain-based traceability platform, ensuring complete authenticity from farm to final product. Kasturi Cotton is dedicated to uplifting the lives and livelihoods of farmers while fostering sustainable growth throughout the global value chain.

For assistance in purchasing certified Kasturi Cotton, visit [www.kasturicotton.com](http://www.kasturicotton.com) or email us at [kasturi@texprocil.org](mailto:kasturi@texprocil.org)



**KASTURI COTTON  
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THE SPIRITUAL FIBRE  
SOFTER · STRONGER · PURER



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[kasturicotton.com](http://kasturicotton.com) | [kasturi@texprocil.org](mailto:kasturi@texprocil.org)



From:  
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