



# TEXTILES & GARMENTS

WEAVING NEW INDIA, ONE THREAD AT A TIME

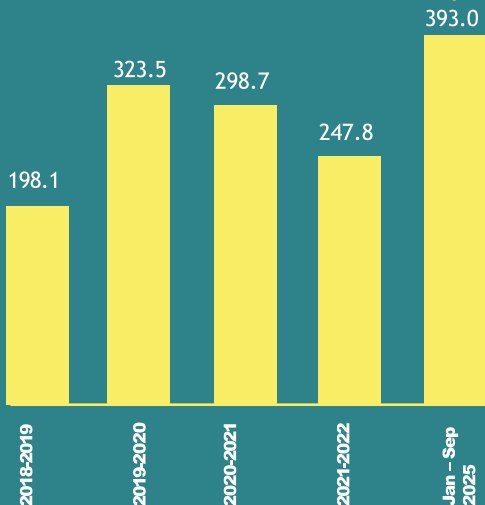


**INVEST INDIA**

# Sector Overview

## GROWTH IN FDI

### FDI INFLOW IN TEXTILES SECTOR (USD MN)



Department for Promotion of Industry and Internal Trade (DPIIT)

## Country wise FDI Inflows (Top Countries)

Mauritius

Singapore

Japan

USA

Netherland

## Current Market Size

**USD 176 Bn**

The Market is expected to grow at a CAGR of 11.3% from 2024-25

to reach **USD 350 Bn by 2030**

## SECTOR RANKING:

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India is the **2<sup>nd</sup> largest** producer of cotton, largest producer of jute; 2<sup>nd</sup> largest producer of silk & polyester; 3<sup>rd</sup> largest textile and apparel exporter

**2<sup>nd</sup>**

largest employment generator (45 Mn direct jobs)

## OTHER FACTS ABOUT THE SECTOR IN INDIA:

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Contributes to

**7%**

of the country's manufacturing production, 2-3% of the GDP and 11% of export earnings

**8**

Centres of Excellence (CoE) have been set up to promote technical textiles

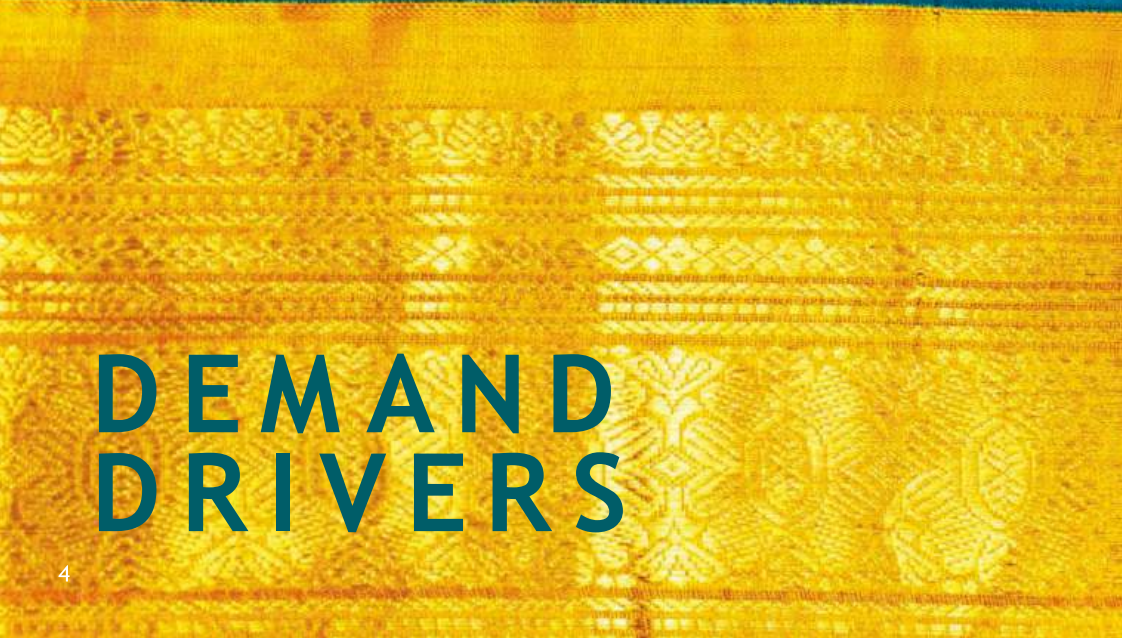
PM Mega Integrated Textiles Parks (PM-MITRA) Scheme for

**7**

Mega Integrated Textile Parks sanctioned at a cost of

**USD 570 Mn**





# DEMAND DRIVERS

## **Favorable Demographics:**

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India offers a large and growing domestic market; the population is to reach 1.51 Bn by 2025, with an average age of 29

## **Increasing Disposable Income:**

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Consumer class households to reach **190 Mn** in 2025, with a collective disposable income of **USD 4 Tn**

## **Government Policy Support:**

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### **Pradhan Mantri Mega Integrated Textile Region and Apparel Parks (PM-MITRA) Scheme:**

The PM Mitra Parks have created world class infrastructure with plug and play facilities, minimum 1000 acres per park. They provide a big boost to employment with 1,00,000 direct and 2,00,000 indirect jobs in each park and attract huge foreign and domestic investment worth approx. INR 70,000 Cr.

### **Production Linked Incentive Scheme:**

The PLI Scheme was launched in December 2021 with the aim of creating global champions in MMF and Technical Textiles. The expected employment generation is **2.45 lakh**. There is a boost to manufacturing capacity and leveraging recent FTAs, and a shift from subsidy-based strategy to **performance-based strategy**. 64 firms are participating and **INR 2,183 crore (including land) is being invested** (gestation period up to Mar 2024). PLI 2 launched in 2025 with minimum investment of INR 50 crores targeting apparel manufacturers

## **Emergence of Retail Sector:**

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Deeper penetration and growth of organised retail will further propel the growth of the textile sector

## **Encouraging all Segments:**

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The government has supported the technical textile industry by allotting

**USD 1Bn** for SMEs

## **Raw Material:**

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India occupies first position in the world in cotton acreage with around 112 lakh hectares.

India is the only country, which is producing all the four commercial varieties of silk, namely Mulberry, Tropical Tasar & Oak Tasar, Muga and Eri.

## **Availability of Skilled and Employable Workforce:**

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Presence of many technical educational institutions

## **Presence of Industrial and Transport Infrastructure:**

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Mumbai Industrial Corridor (DMIC), Amritsar-Kolkata Industrial Corridor (AKIC), Visakhapatnam-Chennai Industrial Corridor (VCIC), Chennai-Bangalore Industrial Corridor (CBIC), and Bangalore-Mumbai Economic Corridor (BMEC)

## **Consumer Market:**

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Growing consumer Market

**3<sup>rd</sup> largest by 2025**

# Ready clusters available for any players looking to come to India

## Key textile and apparel clusters

**Spinning Clusters:**  
Ludhiana, Baddi,  
Coimbatore, Erode,  
Guntur

**Knitting Clusters:**  
Delhi, Ludhiana,  
Tiruppur

**Weaving Clusters:**  
Surat, Tarapur,  
Mumbai, Amravati,  
Ahmedabad

**Apparel Manufacturing Clusters:**  
Delhi, Bangalore,  
Mumbai, Kolkata, Vapi,  
Vishakhapatnam

## Proposed regions for upcoming mega textile parks



# Policy Support & Incentives

## PM MITRA:

- I To attract investment for 'Make In India' initiative and to boost employment generation through setting up of 7 (Seven) PM Mega Integrated Textile Region and Apparel (PM MITRA) Parks in Greenfield/Brownfield sites with world class infrastructure including plug and play facility with an outlay of USD 570 Mn for a period of five years.

## SCHEME FOR CAPACITY BUILDING IN TEXTILE SECTOR (SAMARTH):

- I To address the skilled manpower requirement across textile sector, the scheme was formulated, under the broad policy guidelines of "Skill India" initiative and in alignment with the framework adopted for skilling programme by Ministry of Skill Development and Entrepreneurship.

## NATIONAL TECHNICAL TEXTILES MISSION:

- I With a total outlay of USD 190 Mn, it will be set up for a four-year implementation period from FY 2020-21 to 2023-24.



# Technical Textiles: A Sunrise Sector in Indian Textiles Industry

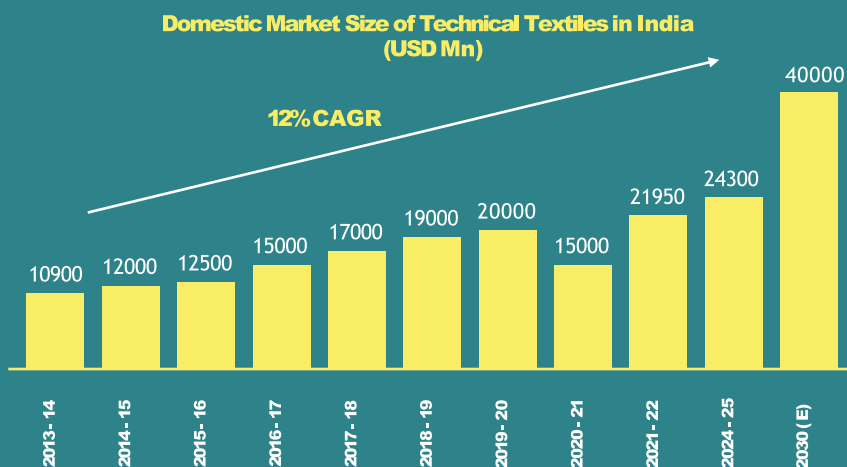
## Indian Technical Textiles Market Size:

■ Current Market Size  
(2024-25)

**USD 24.3 Bn**

■ Expected Market Size  
(2030)

**USD 40 Bn**



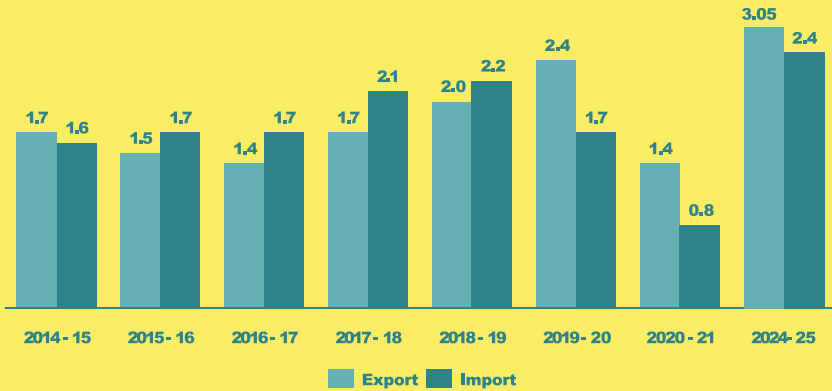
Technical textiles market grew by  
a **CAGR of 8%** in 2024-25

Technical Textiles makes up **12-15%** of  
Indian textile value chain

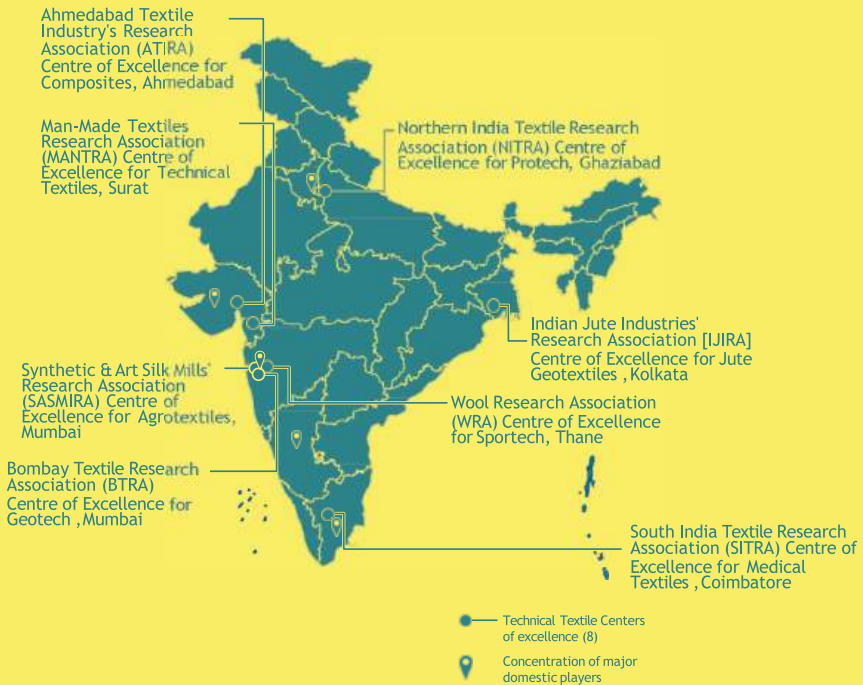
# Indian Technical Textiles Exports and Imports

■ Exports (2024-25)  
**USD 3.05 Bn**

■ Imports (2024-25)  
**USD 2.4 Bn**



## Technical Textile ecosystem in India



## Government Initiatives to Boost Investments

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### 100% FDI under automatic route

#### National Technical Textiles Mission: Allocation of USD 190 Mn over 4 years

- | Mission launched with a view to position the country as a global leader in Technical Textiles and improve the penetration level of technical textiles in the country
- | Mission is divided into four components: Research, Innovation and Development, Promotion and Market Development, Export Promotion and Education and Skill Development
- | A total of 16 new research projects focusing on areas such as, indigenous development of advanced technical textile products, high-performance fibres, smart and functional textiles, protective gear, textile machinery, and composite systems approved in FY25
- | Under Education and Skilling, courses at UG/PG level were implemented with Internship support at UG level.
- | Under the GREAT guidelines, a maximum support of Rs. 50 lakh is provided to each approved start-up. A total of 31 Start-ups have been approved under NTTM at a cost of Rs. 15.40 crore.

## Global Investors

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- | Large Global Players present in technical textiles in India
- | 2100+ manufacturing units in India centred around Gujarat, Maharashtra and Tamil Nadu
- | 2029 manufacturing units set up under Textile Cluster Development Scheme and 1556 manufacturing units to be connected under Integrated Processing Development Scheme



# Textile Machinery

# Textile Machinery: A USD 2 Bn Import Substitution Opportunity

## Indian Textiles Machinery Market

■ Domestic Textile Machinery Demand met by Indigenous manufacturers

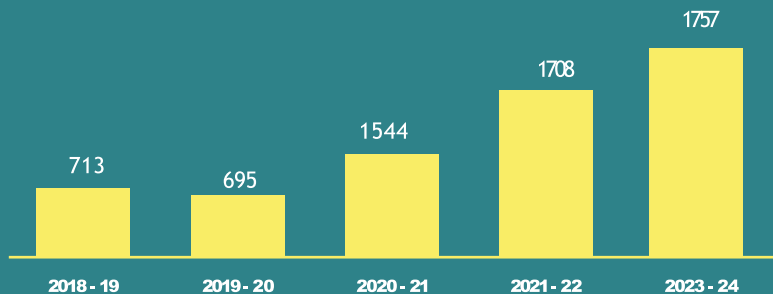
**40%**

*(for the second time in 5 Years)*

■ Domestic Production grew at

**2.4x**

### PRODUCTION OF TEXTILE ENGINEERING INDUSTRY (USD Mn)



# To add \$165Bn in market size, investment of ~\$ 30Bn is needed

Machinery investment Required in India



## 100% FDI investments in Textile Machinery:



**SAURER.**

**RIETER**



**GROZ-BECKERT®**

# Government Incentives to boost domestic production of capital goods

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## Corporate Tax Rate Cut

- | Any new company incorporated after October 2019, making a greenfield investment, to pay income-tax at the rate of 15%

## R&D Support

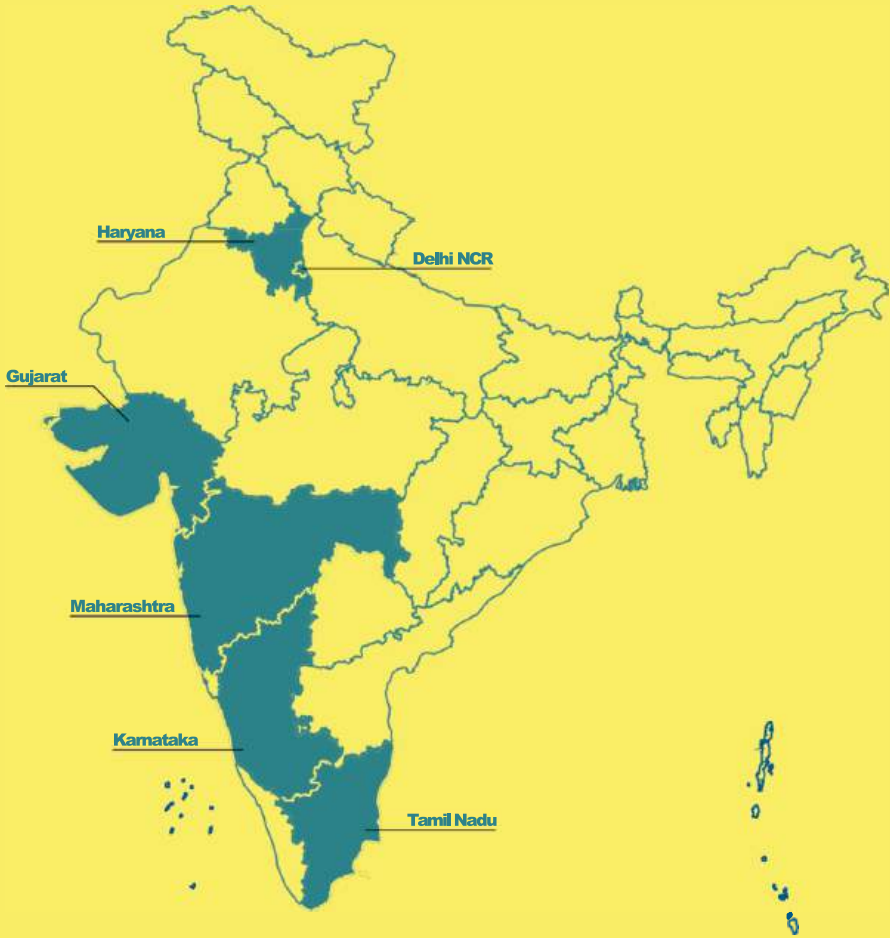
- | Incentives based on direct taxes:  
100% write-off revenue expenditure as well as capital expenditure on R&D
- | Incentives based on indirect taxes:  
Customs duty and central excise duty to in-house R&D units by corporate companies

## Export Incentives

- | Remission Of Duties And Taxes On Exported Products (RoDTEP):  
Reimbursement of taxes and duties incurred by exporters such as local taxes, coal cess, mandi tax, electricity duties and fuel used for transportation
- | Duty Drawback Scheme:  
Refund of duties of customs and of central excise that are chargeable on imported and indigenous materials used in the manufacture of exported goods
- | Export Promotion Capital Goods Scheme:  
EPCG scheme allows import of capital goods, including spares for pre-production, production and post-production at zero duty
- | Custom Bonded Warehouse Scheme:
  - Deferred Duty on Capital Goods: Capital Goods intended for use in a warehouse wherein manufacturing or other operations have been permitted may remain warehoused till their clearance
  - Deferred Duty on Imported Inputs: In the case that the finished good is exported, no duty is required to be paid on the imported inputs, else deferred payment at time of supply of manufactured product

# Key hubs and clusters

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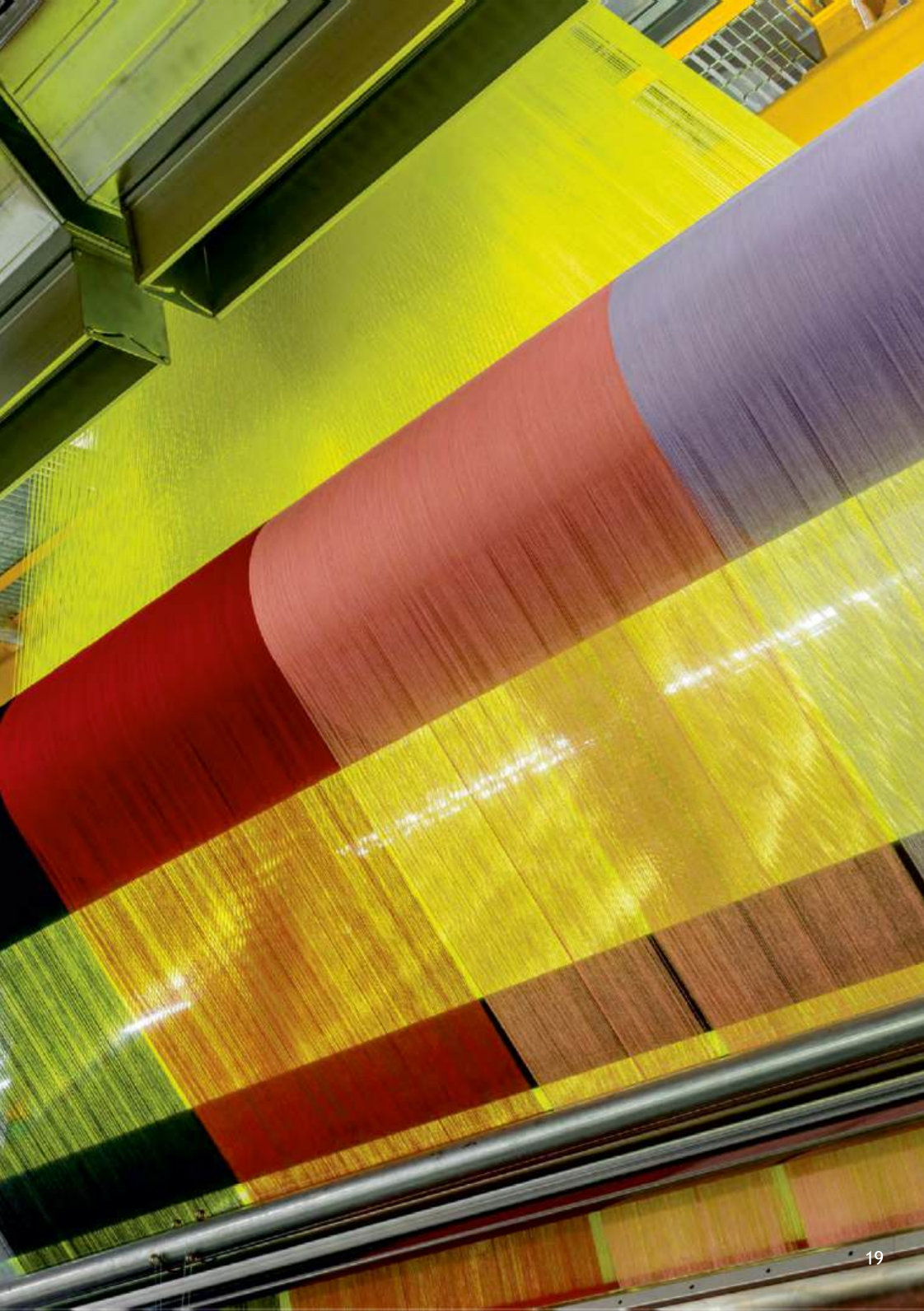
# Success Story:

Epic Group is one of the largest apparel manufacturers and suppliers to major global brands, has been allotted land wherein they are setting up a state-of-the-art apparel manufacturing facility in the state of Odisha.

This comes after almost 1 year of Invest India's continuous engagement with the Leadership and Project teams at EPIC group wherein the team not only pitched the India Investment Opportunity (This is the 1st plant being set up in India) and helped in identifying potential states for investments and multiple site visits across India, but also prepared comprehensive Financial Models for CBA analysis for each state.

Invest India actively supported the Epic Group to help finalize India as an investment destination. Basis this, Epic group has not only decided to invest in India but also increased the quantum of investments by more than 100% from USD 40 Mn to now USD 100 Mn. This would be the largest facility within the Epic Group

The construction of the Phase-1 of the state-of-the-art manufacturing facility (Phase 1 investment amount - USD 26 Mn) is in full swing and this facility after completion in two phases is expected to generate more than 6,000 employment opportunities





To find out more  
<https://www.investindia.gov.in/sector/textiles-apparel>

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