

India Textile Market By Type (Yarn & Fiber, Processed Fabrics & Apparel), By Raw Material (Cotton, PSF, PFY, NFY, VSF, VFY, PPMFY, Others), By Product (Natural Fibers, Polyesters, Nylon, Rayon, Others), By Process (Woven, Non-woven), By Application (Household, Technical, Fashion & Clothing, Others), By Region, Competition, Forecast and Opportunities, 2020-2030F

Market Report | 2024-11-15 | 85 pages | TechSci Research

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Report description:

India Textile Market was valued at USD 178.26 Billion in 2024 and is expected to reach USD 307.80 Billion by 2030 with a CAGR of 9.73% during the forecast period. The Indian textile market ranks among the largest and oldest globally, playing a vital role in the nation's economy. It includes a diverse array of products such as apparel, home textiles, and industrial textiles. The market is experiencing considerable growth, fueled by rising domestic consumption, a flourishing fashion industry, and expanding export opportunities. Employing millions, it is one of the largest job providers in India. The country is a leading producer of cotton and jute, as well as the second-largest producer of silk, with 95% of the world's hand-woven fabric originating from India. Currently, textile exports are valued at USD 34.43 billion and are expected to reach USD 100 billion by 2030. Products like bed linens, curtains, and upholstery are increasingly sought after due to urbanization and changing lifestyles. India hosts a wide range of manufacturers, from small artisans to large multinational companies, with major production hubs in cities such as Ahmedabad, Tirupur, and Jaipur.

According to the Cotton Association of India (CAI), cotton availability for the 2023-24 season is estimated at 34.6 million bales, compared to a domestic demand of 31.1 million bales, which includes 28 million for mills, 1.5 million for small-scale industries, and 1.6 million for non-mills. The Indian government has implemented various initiatives to enhance textile exports, including the Technology Upgradation Fund Scheme (TUFS) and the Production Linked Incentive (PLI) scheme. However, global supply chain disruptions can affect production and delivery schedules, and the market remains highly competitive with numerous domestic and international players. The sector is labor-intensive, facing ongoing challenges related to labor rights and working conditions.

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The rise of e-commerce is transforming consumer shopping habits, making a wide variety of textile products more accessible. There is also an increasing emphasis on sustainability, with brands adopting eco-friendly materials and production methods. The Indian textile market offers substantial growth opportunities driven by innovation, shifting consumer trends, and favorable government policies. Industry stakeholders must effectively navigate these challenges to take advantage of the growing demand for textiles, both domestically and internationally.

Key Market Drivers

Government Initiatives

Government initiatives are essential for the growth of the Indian textile market. Make in India initiative aims to boost domestic manufacturing by increasing investment, enhancing skill development, and promoting local textile production. By strengthening domestic capabilities, it reduces reliance on imports, creates local jobs, and attracts foreign direct investment (FDI) into the textile sector.

The government is also establishing Textile Manufacturing Clusters, known as Mega Textile Parks, which will offer shared infrastructure, including common processing units and testing labs. For example, in August 2023, the government approved the creation of seven PM Mega Integrated Textile Region and Apparel (PM MITRA) Parks on both Greenfield and Brownfield sites. These parks will feature world-class infrastructure, including plug-and-play facilities, with a total investment of USD 535 million over a seven-year period, concluding in 2027-28. This development reduces operational costs for small and medium enterprises (SMEs), encourages collaboration, and attracts investment through ready-to-use facilities.

Additionally, the government has allocated significant funds to initiatives like the Amended Technology Upgradation Fund Scheme (ATUFS), with USD 110 million set aside in the 2023-24 union budget to stimulate private equity investments and create jobs. This program provides financial support for modernizing the textile sector by adopting advanced technologies, thereby enhancing efficiency and productivity. The National Textile Policy aims to achieve targeted growth in the textile sector, boost employment, and enhance global competitiveness. In June 2023, the government approved research and development projects worth USD 7.4 million in the textile industry.

The government also launched the Production Linked Incentive (PLI) Scheme with an outlay of USD 1.27 Billion to promote the production of man-made fiber (MMF) apparel, MMF fabrics, and technical textiles. This initiative encourages manufacturers to increase production, drive innovation, improving quality, and expanding into new markets. Initiatives such as the Skill India Mission and the Integrated Skill Development Scheme focus on training the workforce in various textile-related skills. By developing a skilled labor force, these initiatives support industry growth and productivity.

The government promotes handloom products through various schemes that offer financial aid, marketing support, and design development, helping preserve traditional crafts and enhance artisans' livelihoods. Export promotion initiatives like the Merchandise Exports from India Scheme (MEIS) provide incentives to exporters based on their performance, thereby improving their competitiveness in global markets and significantly contributing to the country's foreign exchange earnings. The government also facilitates access to loans for textile businesses through schemes like the Credit Guarantee Fund Scheme, which supports SMEs in investing in growth, technology, and infrastructure. These government initiatives collectively strengthen the Indian textile market by fostering innovation, enhancing competitiveness, and supporting sustainable practices. By addressing challenges related to infrastructure, technology, and skills, the government is paving the way for the sector's growth and its position in the global textile industry.

Growth of E-commerce

E-commerce platforms enable textile brands to connect with consumers in both urban and rural areas, effectively overcoming geographical barriers. Online marketplaces provide a wide range of textile products, from traditional garments to contemporary fabrics, catering to varied consumer tastes. India has approximately 936.16 million internet subscribers, including around 350 million active online users engaged in transactions.

E-commerce allows consumers to shop at their convenience, facilitating easy browsing and purchasing of textiles outside the limitations of physical store hours. This online shopping environment empowers consumers to easily compare prices, quality, and styles, leading to well-informed purchasing decisions. As online shopping gains traction, consumers increasingly prefer brands with a robust online presence, prompting a shift in marketing strategies. For example, in November 2023, Reliance Foundation launched the first 'Swadesh' handicrafts store in Hyderabad to support and promote Indian crafts. Social media platforms are vital

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for promoting textile brands, influencing consumer trends, and driving online sales.

E-commerce also reduces the necessity for physical retail space, lowering operational costs for businesses, which can then be passed on to consumers through competitive pricing. Additionally, e-commerce platforms leverage data analytics to provide personalized recommendations and targeted advertisements, enhancing the shopping experience and boosting conversion rates. Many online platforms offer customization options, allowing customers to tailor products to their preferences and increasing satisfaction.

E-commerce provides small and medium enterprises (SMEs) an accessible entry point into the market without the need for significant investments in physical stores. Innovations in logistics have improved the efficiency of order fulfillment for textile businesses, further enhancing customer satisfaction. For instance, in December 2023, the indigenous e-commerce leader Flipkart secured USD 1 billion in a funding round, with its parent company Walmart anticipated to invest USD 600 million. This funding will be used to expand operations and upgrade its digital infrastructure to better serve customers throughout India.

The proliferation of smartphones has facilitated mobile shopping, allowing consumers to easily browse and purchase textiles on-the-go. Many textile brands have launched dedicated apps to enhance the shopping experience and engage customers. In June 2024, BALWOM introduced its new mobile application, BALWOM-B2B Fashion Shopping, specifically designed to meet the needs of shopkeepers in wholesale and retail markets. Renowned for its innovative and stylish products at budget-friendly prices, BALWOM continues to support the competitive fashion industry with this technological advancement.

The growth of e-commerce is transforming the Indian textile market by enhancing accessibility, improving consumer convenience, and facilitating personalized shopping experiences. As more consumers turn to online platforms for their textile needs, brands must adjust their strategies to succeed in this dynamic environment, ultimately driving the market's overall growth.

Key Market Challenges

Environmental Concerns

Textile production, especially during dyeing and finishing, consumes large quantities of water, which can exacerbate water scarcity in already vulnerable regions. This excessive water use raises sustainability concerns, particularly in arid areas. Additionally, untreated effluents from textile manufacturing can pollute local water sources, harming aquatic ecosystems and impacting surrounding communities. Emissions from textile mills also contribute to air quality problems, affecting the health of both workers and nearby residents.

The industry generates significant waste, including leftover fabrics, packaging, and defective items, making sustainable waste management increasingly critical. Improper disposal can lead to overflowing landfills and environmental damage. The use of hazardous chemicals in dyeing and finishing processes poses risks to workers and the environment. Stricter regulations on harmful chemicals require investments in safer alternatives and processes.

There is a growing demand from consumers and regulators for greater transparency regarding the environmental impact of sourcing practices. Implementing eco-friendly initiatives often necessitates substantial investments in new technologies and processes, which can be particularly challenging for small and medium enterprises (SMEs). Additionally, achieving sustainability certifications (such as GOTS and OEKO-TEX) involves compliance costs and complex procedures. To address these challenges, stakeholders must prioritize sustainable practices, invest in cleaner technologies, and meet consumer demand for eco-friendly products. By doing so, the industry can improve its resilience and long-term viability.

High Production Costs

Fluctuations in the prices of raw materials, such as cotton and synthetic fibers, can lead to unpredictable production costs. Increasing labor costs due to minimum wage regulations and labor rights movements can put pressure on profit margins. Additionally, inefficient transportation and logistics systems can raise expenses related to sourcing materials and delivering products. Compliance with environmental and safety regulations can incur extra costs for manufacturers, while obtaining necessary sustainability and quality certifications may require substantial financial investment.

Intense competition in the textile sector can trigger price wars, forcing companies to lower their prices, which impacts profitability. The demand for innovative and high-quality products necessitates ongoing investments, further driving up production costs. Managing inventory during seasonal demand fluctuations can lead to higher holding costs and waste from unsold goods. Adjusting production schedules to meet seasonal needs can also introduce inefficiencies and increase operational costs. Furthermore,

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disruptions caused by events such as pandemics, geopolitical tensions, or natural disasters can negatively affect supply chains, resulting in increased costs and delays. To address these challenges, stakeholders should focus on improving operational efficiencies, investing in technology, optimizing supply chains, and implementing sustainable practices. By doing so, the industry can enhance its competitiveness and profitability in both domestic and international markets.

Key Market Trends

Rise of Athleisure and Comfort Wear

The rise of athleisure and comfort wear is a notable trend in the Indian textile market, influenced by shifting consumer lifestyles and preferences. Athleisure combines athletic and casual styles, making it versatile for various occasions, from workouts to daily activities. Consumers value the flexibility and comfort these garments provide. There is an increasing demand for soft, breathable, and stretchable fabrics, as comfort becomes a priority in clothing choices. Many athleisure products feature functionalities like moisture-wicking, quick-drying, and temperature control, enhancing their appeal for active individuals.

As more consumers adopt fitness routines and emphasize health, the demand for athletic apparel has risen sharply. Athleisure meets this demand by offering stylish yet functional options. Additionally, the link between comfortable clothing and mental wellbeing is gaining traction, leading consumers to favor relaxed styles that enhance overall comfort. There is a growing interest in athleisure brands that prioritize sustainable materials and ethical manufacturing, pushing companies to innovate in this space. For example, in September 2024, Rudra Ecovation showcased its sustainable manufacturing approach at the Plastic Recycling Show ME&A 2024 in Dubai, launching a new sportswear line called Anaura Athleisure, made entirely from upcycled fabric. This collection is designed without harmful chemicals and employs moisture-wicking technology derived from sustainable cellulose, negating the need for additional chemical treatments. Utilizing AI, the company can predict the quality of recycled products before production, lowering costs and boosting efficiency, ensuring high-quality initial samples that minimize waste.

Social media and fitness influencers are pivotal in promoting athleisure, demonstrating its versatility for both workouts and casual wear. Brands are adopting community-focused marketing strategies, engaging consumers through fitness events, classes, and online platforms. Athleisure has evolved beyond mere functionality; stylish designs and trendy aesthetics are now crucial for attracting fashion-conscious consumers. The growth of e-commerce has also facilitated easier access to athleisure products, leading to increased sales. Online platforms often provide customization options, allowing consumers to personalize their purchases. For instance, in November 2023, the NBA and Suditi Sports Apparel announced a multiyear partnership to produce and distribute licensed NBA fanwear in India, solidifying their long-standing collaboration. The complete collection is available on Suditi's direct-to-consumer platform, ShopTheArena.com, as well as select offline and online retail channels across the country. Collaborations between athletic brands and fashion designers are also creating high-fashion athleisure lines that attract a wider audience. As this trend continues to develop, brands will need to innovate and adapt their offerings to meet the changing demands of the market.

Segmental Insights

Application Insights

Based on Application, the Technical emerged as the fastest growing segment in the Indian market for Textile during the forecast period. Technical textiles are employed across a range of industries, including automotive, healthcare, construction, agriculture, and packaging. This diversity creates a broad market base and numerous growth opportunities. The segment is distinguished using innovative materials and technologies, such as composites, non-wovens, and smart textiles, which enhance both functionality and performance. In sectors like healthcare and construction, there is an increasing demand for textiles that offer safety and protection, such as flame-resistant and antibacterial fabrics. The Indian government actively supports the technical textiles industry through various initiatives, including the Production Linked Incentive (PLI) scheme, which promotes investment and innovation. For example, the Ministry of Textiles has approved 19 research projects totaling approximately USD 2.52 million under the National Technical Textiles Mission.

The government aims to establish India as a global hub for technical textiles, further driving growth through infrastructure development and investment incentives. In August 2023, the government introduced the Startup Guidelines for Technical Textiles, providing grants of up to USD 5.95 Million for research and entrepreneurship initiatives over an 18-month period to support the infrastructure development.

Continuous research and development in technical textiles lead to the creation of new products tailored to specific needs,

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facilitating further market expansion. For instance, in October 2024, IIT Delhi signed a memorandum of understanding with the Indian Air Force (IAF) to advance innovative technologies for aviation textiles, focusing on AI-powered research related to parachutes and other safety equipment.

As sustainability becomes increasingly important, technical textiles that use recycled or biodegradable materials are gaining popularity, aligning with global environmental objectives. Industries are adapting to incorporate these textiles into their offerings, further driving growth. India holds significant potential for exporting technical textiles, accessing global markets that require specialized products. As industries evolve and demand for tailored solutions grows, this segment is expected to experience sustained growth in the coming years.

Product Insights

Based on Product, Polyesters emerged as the dominating segment in the Indian market for Textile in 2024. Polyester is recognized for its strength and durability, making it less susceptible to tearing and fraying compared to other fabrics. This resilience extends the lifespan of polyester products. Additionally, polyester is typically more affordable to produce than natural fibers, enabling manufacturers to offer competitive prices that appeal to a broad range of consumers.

Polyester fabrics resist wrinkles, shrinking, and stretching, and they dry quickly, which reduces the time and effort needed for washing and maintenance, making them highly convenient for users. This material is versatile, suitable for various applications, including apparel, home textiles, and industrial uses, effectively meeting diverse consumer demands. Polyester retains dye exceptionally well, resulting in vibrant and long-lasting colors, making it particularly popular in the fashion and design sectors, where color richness is essential. Polyester can also be easily blended with natural fibers like cotton and wool, enhancing the overall properties of the final fabric. These blends provide the comfort of natural fibers alongside the durability of polyester.

Recent innovations in polyester production, such as the creation of recycled polyester from PET bottles, are attracting environmentally conscious consumers. The fast fashion industry frequently relies on polyester due to its cost-effectiveness and ease of production, emphasizing quick turnaround times and regular new collections. This ability to meet the evolving needs of modern consumers ensures polyester's continued dominance in the textile industry.

Regional Insights

Based on Region, South India emerged as the dominant region in the Indian market for Textile in 2024. South India, especially Tamil Nadu and Karnataka, is among the country's leading cotton producers, providing a significant supply of raw materials for extensive textile manufacturing. The region boasts a well-established textile infrastructure, including spinning mills, weaving units, and garment factories, which facilitate efficient production and effective supply chain management. South India manufactures a diverse array of textiles, including cotton, silk, and technical fabrics, serving both domestic and international markets. Tamil Nadu is renowned for its handloom products, such as Kanchipuram silk sarees, which enhance the region's textile prestige through traditional craftsmanship.

The area benefits from a substantial pool of skilled labor adept in various textile processes, including weaving, dyeing, and finishing, which contributes to higher quality and efficiency in production. The local government actively supports the textile sector through initiatives like subsidies, infrastructure development, and assistance for small and medium enterprises (SMEs). South Indian textile manufacturers are increasingly adopting advanced technologies, such as automation and eco-friendly practices, to enhance productivity and sustainability. For example, in January 2024, GHCL Textiles Ltd announced an investment of USD 63.64 Million for capacity expansion in Tamil Nadu.

The region's strategic location near major ports facilitates the easy export of textiles to global markets, boosting its competitiveness. With a rising focus on sustainable and organic textiles, South India is aligning with global trends and responding to increasing consumer awareness, further driving innovation within the sector. This adaptability and diverse production capabilities help reinforce its dominant position in the textile market.

Key Market Players

- ☐ Reliance Industries Ltd.
- ☐ Vardhman Textiles Ltd.
- ☐ Arvind Limited
- ☐ Welspun India Ltd.
- ☐ Grasim Industries Limited

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- ☐☐Siyaram Silk Mills Ltd.
- ☐☐Sutlej Textiles and Industries Ltd.
- ☐☐Morarjee Textiles Limited
- ☐☐Trident Limited
- ☐☐Century Textiles & Industries Ltd.

Report Scope:

In this report, the India Textile Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

☐☐India Textile Market, By Type:

- o Yarn & Fiber
- o Processed Fabrics & Apparel

☐☐India Textile Market, By Raw Material:

- o Cotton
- o PSF
- o PFY
- o NFY
- o VSF
- o VFY
- o PPMFY
- o Others

☐ India Textile Market, By Product:

- o Natural Fibers
- o Polyesters
- o Nylon
- o Rayon
- o Others

☐ India Textile Market, By Process:

- o Woven
- o Non-woven

☐ India Textile Market, By Application:

- o Household
- o Technical
- o Fashion & Clothing
- o Others

☐☐India Textile Market, By Region:

- o West India
- o North India
- o South India
- o East India

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the India Textile Market.

Available Customizations:

India Textile Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

☐☐Detailed analysis and profiling of additional market players (up to five).

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