



INDIA – COUNTRY STATUS PAPER

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Association Of Synthetic
Fibre Industry (ASFI)
www.asfiindia.com

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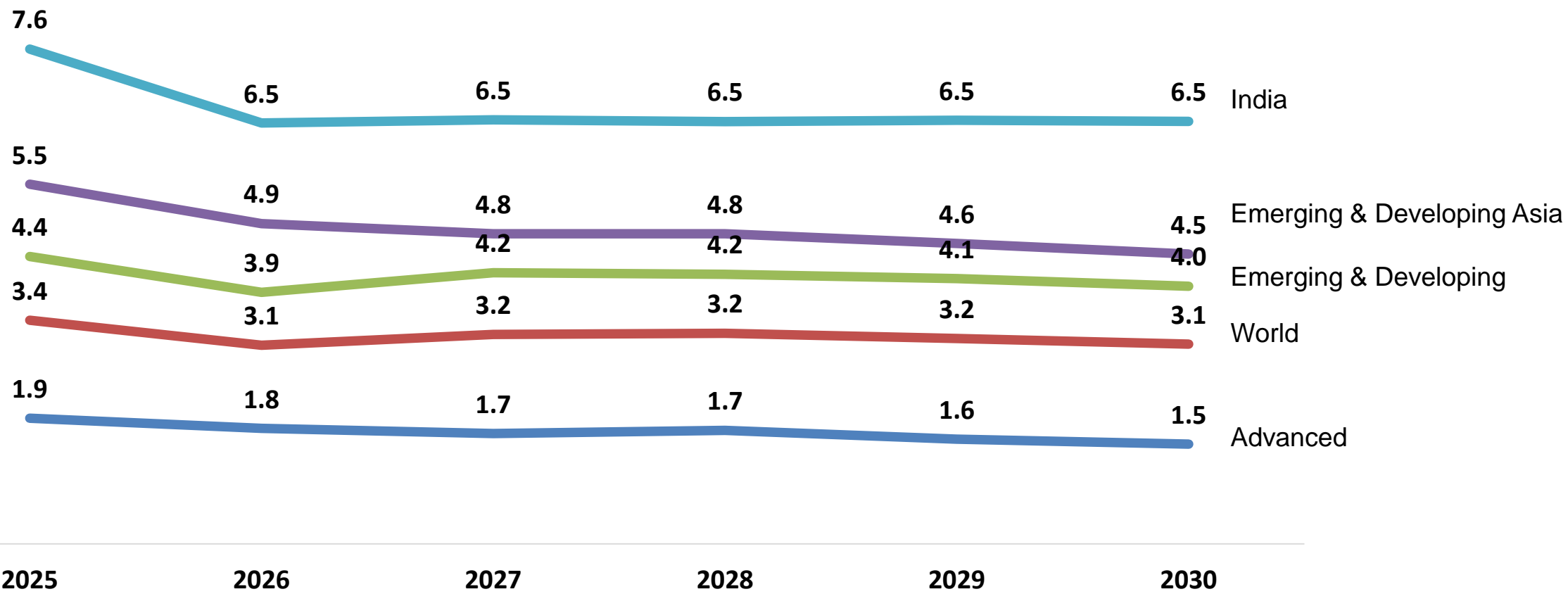


- 1. India: A Growth Story**
- 2. India : Advantage Textiles**
- 3. India : Textile Market Vision**
- 4. India : Man-Made Fibres (MMF), Yarns and Sustainability Drives**
- 5. India : Present Capacity and Production of Raw Materials, MMF / Yarns**
- 6. India : Import and Export of MMF/ Yarn, Technical Textiles**
- 7. India : Supportive Government**
- 8. India : Sustainability Alignment**
- 9. Summary**

India: Strong growth backed by resilient sentiments



GDP Growth (%)

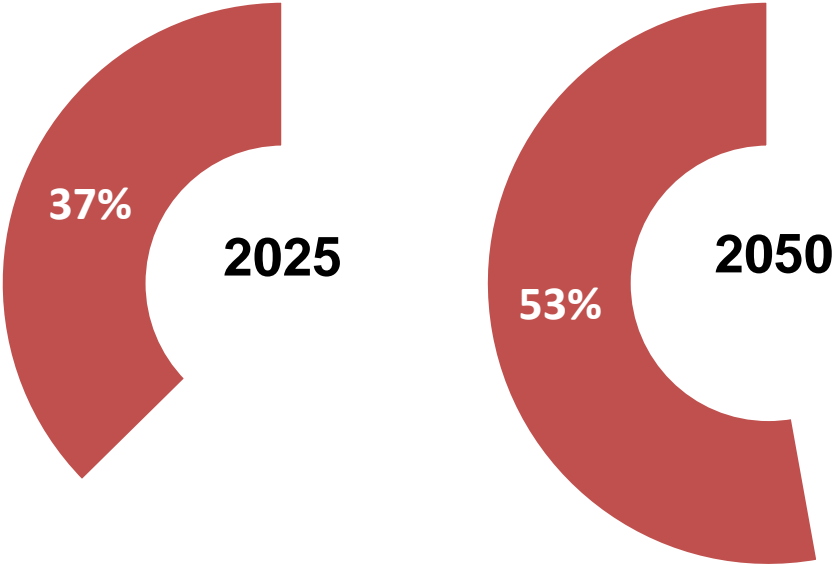


Source: IMF

India to be fastest growing major economy globally



India Urbanisation (% of Population)



Additional 340 million people will move to urban areas in next 25 years

Government Push to Urbanisation



\$1.5 Tr investment under National Infrastructure Pipeline

Smart City Mission

- AMRUT 2.0:** Atal Mission for Rejuvenation and Urban Transformation
- PMAY-U:** Pradhan Mantri Awas Yojana–Urban
- NUDM:** National Urban Digital Mission

Growing migration fueling demand for housing, infrastructure, and consumer goods

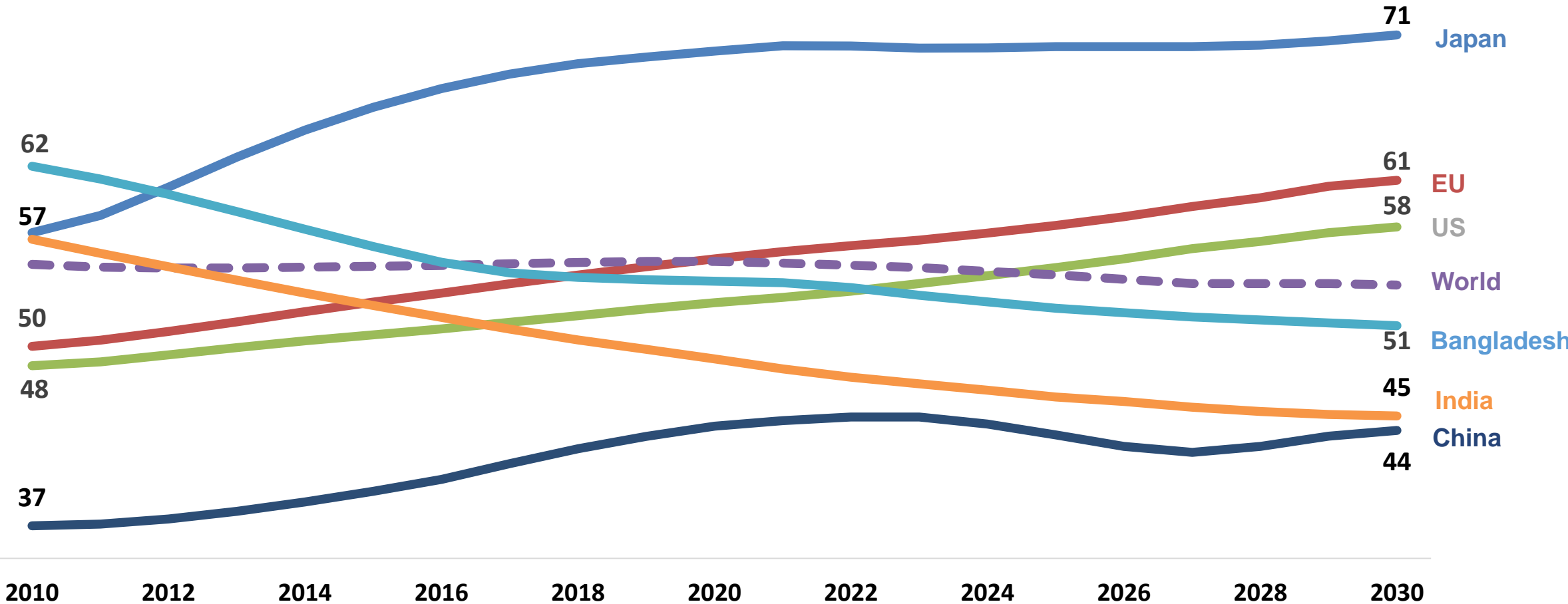
Source: World Bank

Urbanization key to India achieving its \$30 Tn economy by 2047

Demographic Dividend



Dependency Ratio



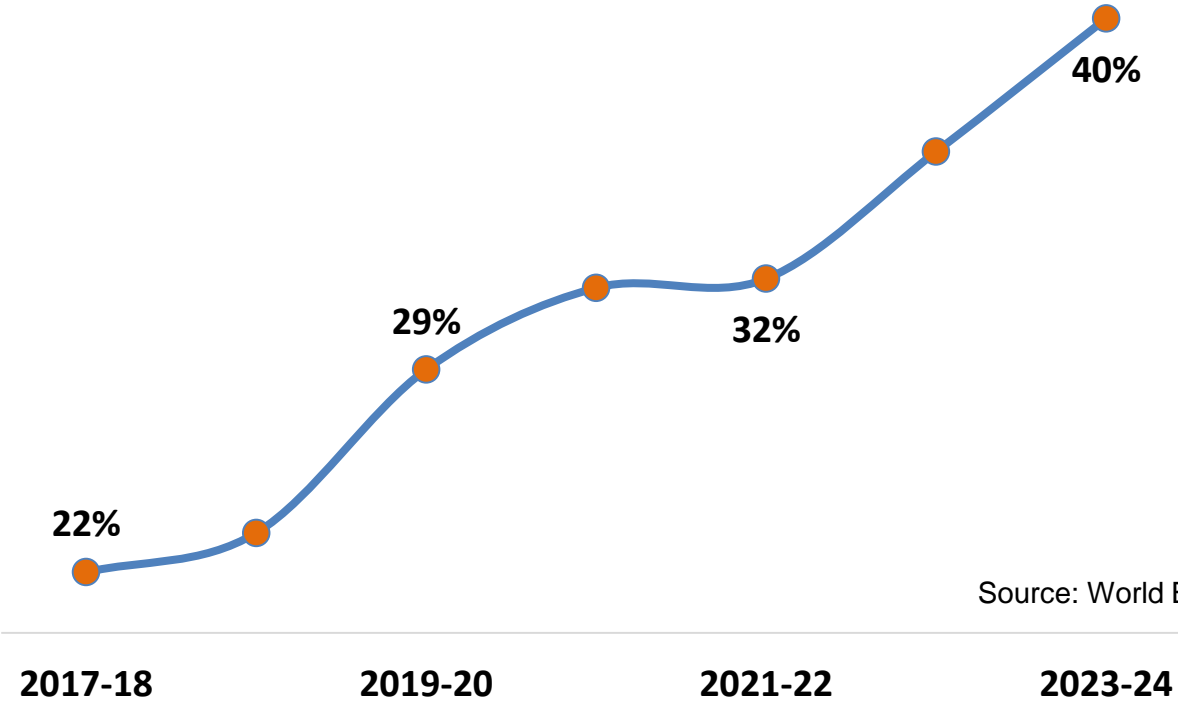
Source: World Bank

65% of India's population is < 35 years: Youngest workforce
(Median Age : 29.4 Years)

Growth in Working Population (Age 15-64)

In Million	2025	2030	Growth	Share
Bangladesh	115	123	8	3%
China	980	965	-15	-6%
India	1002	1053	51	22%
EU	284	276	-9	-4%
USA	221	221	1	0%
Japan	72	70	-3	-1%
Viet Nam	69	71	2	1%
World	5352	5590	237	100%

Worker Population Ratio (Female)



Source: World Bank

Strong demographics and growing women workforce make India a global growth story



Indian textiles has opportunities galore inhouse and beyond

India: Textile Market Vision



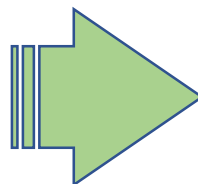
T&A Market Size

CAGR% (25-31)

Current: \$184 Bn

Domestic 147

Exports 37



Target \$350

250



100



11%

9%

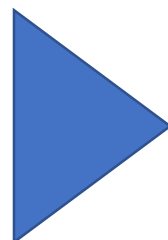
18%

Fiber Supply

Current: 13 MMT

Cotton 5

MMF 8



Required: 20 MMT

6



14

7.5%

3%

10%

India needs to establish a strong leadership position in MMF textiles

India: Man Made Fibre, Yarns & Sustainability Drives



MMF Product / Sector	Polyester (Fibre & Filament)	Viscose (Fibre & Filament)	Nylon (NFY), Acrylic, Spandex Yarn	Spun Yarns
Global Ranking	2 nd Largest	2 nd Largest	5 th , 2 nd , 3 rd	2 nd Largest
Key Players	28	3	16, 3, 2	65
Present Production (MMT)	6.9	1.0	0.2, 0.1, 0.07	3.7 (1.2 MMT Blended & 100% Non-Cotton), 48 Mn Spindles
Sustainability / Recycling	1 MMT recycled Brands : Recron Green, R/Elan–Fabric, Go Rewrite	New sustainable alternative, Growth potential >10%, Brands: Livaeco, Raysileco, Birla Cellulose	Initiated Recycling with Nylon/ Fish Net Yarns, Tyre Cord Fabrics. Brand: ‘neunyl’	Textile to textile recycling (also with blends) are focus areas in diff clusters, e.g., Panipat, Tirupur, Surat, Ludhiana

Global: 55-60% Textile trade is Apparel - Out of that 40% is MMF.
 India: MMF apparel export is 25% out of total textile exports pointing to significant growth potential.
 India’s export of MMF Made ups is 50% of its total textile exports.

Source: MoT / Wazir/ Internal Analysis

India: Man made Fibre (MMF) / Yarn Capacity

MMF	Capacity (KT) 2025
Polyester Filament Yarn (PFY)	6589
Polyester Staple Fibre (PSF)	2660
Viscose Staple Fibre (VSF)	876
Acrylic Staple Fibre (ASF)	106
Nylon Filament Yarn (NFY)	210
Nylon Industrial Yarn (NIY)	115
Viscose Filament Yarn (VFY)	81
Nylon Tyre Cord Fabric (NTCF)	144
Polyester Industrial Yarn (PIY)	85
Elastomeric / Spandex Yarn	65
Polypropylene Filament Yarn (PPFY)	19
Polypropylene Staple Fibre (PPSF)	12
Feedstock	Capacity (KT) 2025
Paraxylene (PX)	5670
Purified Terephthalic Acid (PTA)	6680
Mono Ethylene Glycol (MEG)	2800
Caprolactum	50

India: Man made Fibre (MMF) / Yarn Production



(Qty in '000 tonnes)

Product Name	2021-22	2022-23	2023-24	2024-25	2025-26	CAGR 2022-26
Acrylic Staple Fibre (ASF)	59	91	73	74	89	10.8%
Nylon Filament Yarn (NFY)	104	116	134	165	198	17.5%
Polyester Filament Yarn (PFY)	3767	4021	4237	4485	4860	6.6%
Polyester Staple Fibre (PSF)	1650	1760	1835	1940	2134	6.6%
Polypropylene Filament Yarn (PPFY)	13	14	15	15	16	5.3%
Polypropylene Staple Fibre (PPSF)	2	3	2	4	6	31.6%
Elastomeric / Spandex Yarn	55	57	65	65	65	4.3%
Viscose Filament Yarn (VFY)	59	58	60	60	60	0.4%
Viscose Staple Fibre (VSF)	639	721	812	844	913	9.3%

Indian MMF production growth at par with global growth → with feedstock support

Source: Internal Analysis

Supportive Government - 1



Initiative	Focus Area	Impact
FDI (100% automatic)	Global capital inflow	Boosts scale & technology transfer
PLI Scheme	MMF & technical textiles	Incentivises innovation & exports
GST Rationalisation	Tax simplification	Reduces cost, eases MSME compliance
FTAs (EU, UK, Aus)	Market access	Tariff-free entry, ESG alignment
Mega Textile Parks	Infrastructure	Integrated hubs for competitiveness



Source: MoT / Internal Analysis

1. FDI & Investment

- **100% FDI under automatic route** continues for textiles and apparel.
- **PM MITRA Mega Textile Parks:** Large integrated hubs with world-class infrastructure to attract global investors.
- **PLI Scheme (Production Linked Incentive):** Focused on MMF (man-made fibre) and technical textiles, incentivising scale, innovation, and exports

2. GST Rationalisation

- Ongoing efforts to **simplify GST slabs** and address inverted duty structures.
- Aim: **reduce compliance burden for MSMEs**, improve liquidity, and ensure uniformity across fibre, yarn, and fabric categories.
- Expected impact: **lower working capital blockage** and enhanced competitiveness in exports.

3. Free Trade Agreements (FTAs)

- Active negotiations with **EU, UK, and Australia**, prioritising textiles.
- FTAs include **rules of origin and sustainability clauses**, aligning with ESG commitments.

4. Union Budget 2026–27 Highlights

- **Textile Sector :** Integrated Programme for Textile Sector, **Textile Expansion & Employment (TEEM) Scheme, National Fibre Scheme (NFS)**, Mega Textile Parks.
- **Cluster Modernisation & Skilling:** Support for MSMEs, artisans, and rural livelihoods, MOT's SAMARTH 2.0 for Skill upgradation
- **Sustainability Incentives:** Recycling, circular economy, and low-carbon manufacturing – **Tex-Eco Initiatives..**
- **Employment Generation:** Labour-intensive textiles positioned as a key pillar in India's manufacturing expansion strategy.

India: Import of Man Made Fibre (MMF) / Yarn



(Qty in '000 tonnes)

Product Name	2021-22	2022-23	2023-24	2024-25	2025-26	CAGR (2022-26)
ACRYLIC STAPLE FIBRE (ASF)	31	22	13	12	13	-19.5%
NYLON FILAMENT YARN (NFY)	51	64	57	78	121	24.1%
POLYESTER FILAMENT YARN (PFY)	291	483	489	238	439	10.8%
POLYESTER STAPLE FIBRE (PSF)	78	95	53	68	87	2.8%
POLYPROPYLENE STAPLE FIBRE (PPSF)	3	5	7	6	9	31.6%
POLYPROPYLENE FILAMENT YARN (PPFY)	0.3	0.2	0.3	0.3	0.7	22.1%
ELASTOMERIC / SPANDEX YARN	11	9	7	9	7	-10.7%
VISCOSE FILAMENT YARN (VFY)	40	52	53	59	73	16.2%
VISCOSE STAPLE FIBRE (VSF)	76	141	54	64	114	10.7%

Source: MOC, DGCIS

India: Export of Man Made Fibre (MMF) / Yarn



(Qty in '000 tonnes)

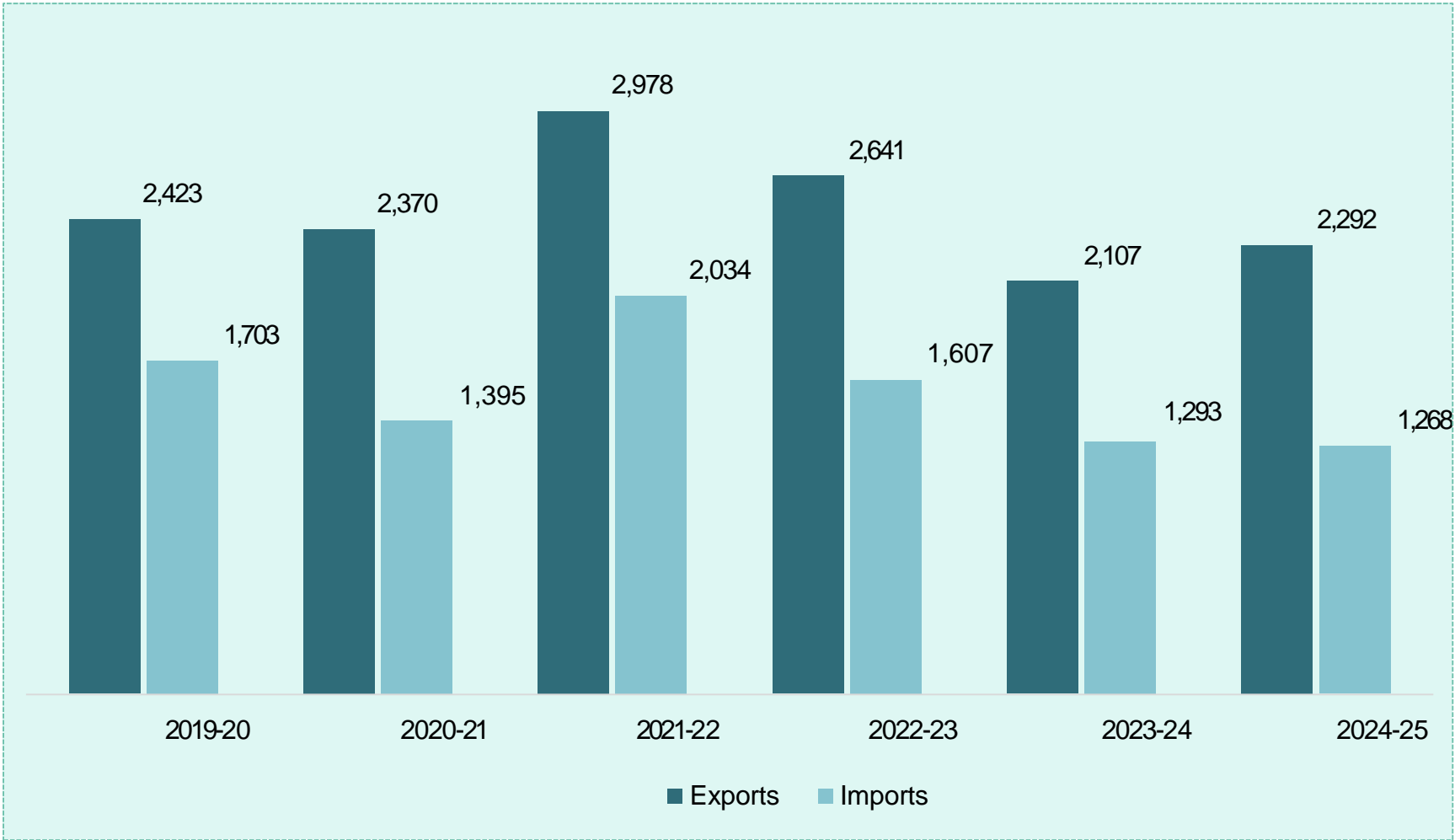
Product Name	2021-22	2022-23	2023-24	2024-25	2025-26	CAGR (2022-26)
ACRYLIC STAPLE FIBRE (ASF)	3	10	3	3	5	13.7%
NYLON FILAMENT YARN (NFY)	11	13	15	17	17	12.7%
POLYESTER FILAMENT YARN (PFY)	700	428	372	428	391	-13.5%
POLYESTER STAPLE FIBRE (PSF)	384	227	207	274	251	-10.1%
POLYPROPYLENE STAPLE FIBRE (PPSF)	11	12	10	11	10	-1.1%
POLYPROPYLENE FILAMENT YARN (PPFY)	0.8	1.0	1.2	1.2	1.8	23.4%
ELASTOMERIC / SPANDEX YARN	6	3	8	9	5	-2.3%
VISCOSE FILAMENT YARN (VFY)	5	4	5	5	7	9.7%
VISCOSE STAPLE FIBRE (VSF)	96	62	77	48	71	-7.3%

Source: MOC, DGCIS

India: Technical Textiles Exports and Imports



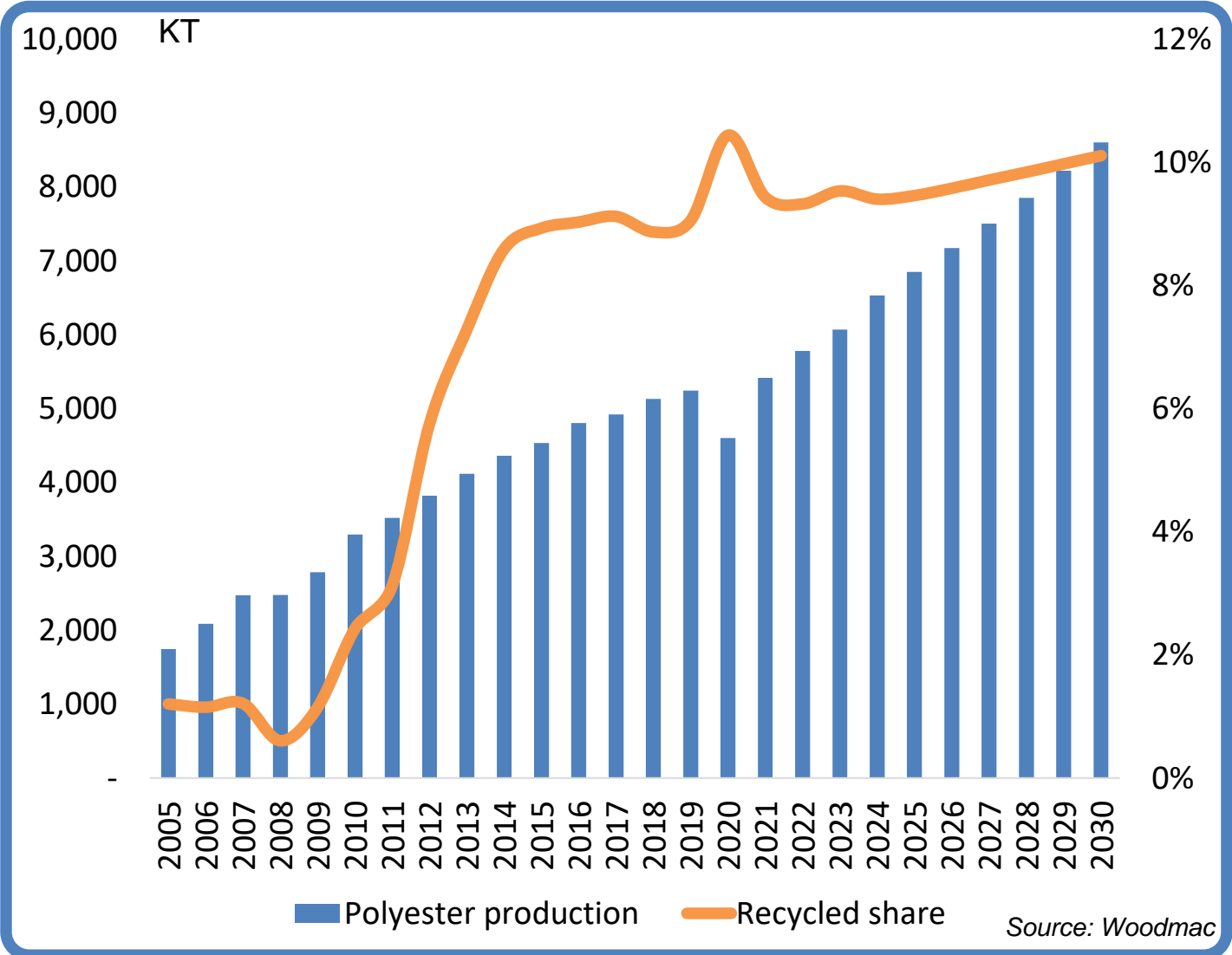
Values in US\$ Mn.



- India's exports of technical textiles in 2024-25 was approx. US\$ 2.2 billion, decline at a CAGR of -1% since 2019-20.
- The imports of technical textiles in 2024-25 was approx. US\$ 1.2 billion, which has declined at a CAGR of -6% since 2019-20.

Data Source – DGCI&S and Wazir Analysis

India : Being environmentally responsible



- Around 40 (Forty) billion bottles recycled annually
- Encouraging post consumer PET collection and recycling
- Promoting use of recycled products
- Support of Govt.

Industry engaged at various levels to raise awareness & adoption

India: Environmental Sustainability



Initiative	Focus Area	Impact
ESG Task Force	Certification & compliance	Aligns exports with EU/UK standards
Tex-Eco Initiative	Green tech adoption	Cuts emissions, improves water efficiency
Waste Value Chain Mapping	Recycling & circularity	Promotes fiber-to-fiber reuse
National Fibre Scheme	Sustainable raw materials	Encourages eco-friendly fibre production
Samarth 2.0 (Skilling)	Workforce sustainability	Builds green skills among artisans & SMEs

Source: MoT / Internal Analysis

Government-Led Sustainability Push

1. ESG Task Force

- The Government of India has set up an **Environment, Social, and Governance (ESG) Task Force** to guide sustainable production, certification frameworks, and export readiness.
- Objective:** Align India's textile industry with **global compliance standards** and strengthen competitiveness in EU/UK markets.

2. Green Technology & Circularity

- Tex-Eco Initiative (2026):** Incentives for wastewater treatment, renewable energy adoption, and energy-efficient machinery.
- Circular Value Chains:** Promotion of fiber-to-fiber recycling, industrial symbiosis, and extended producer responsibility (EPR).

3. Mapping Textile Waste Value Chain

- The Ministry of Textiles released a **comprehensive mapping of India's textile waste ecosystem (Feb 2026)**.
- Identifies opportunities for **closed-loop recycling** and highlights gaps in waste segregation and reuse.

4. National Fibre Scheme

- Encourages **eco-friendly fibre production** (organic cotton, recycled polyester, biodegradable fibres).
- Supports raw material diversification to reduce dependence on virgin synthetic fibres.

India : Policy Snapshot

Target / Initiative	Focus Area	Impact
90% PET recycling	Circular economy, MMF yarn	Reduces plastic waste, boosts polyester recycling
Carbon emission targets	Climate alignment	Net-zero pathway for textiles
Air & water pollution norms	ZLD, wastewater treatment	Cleaner production, compliance with ESG
Renewable energy adoption	Solar, wind, biomass	Cuts fossil fuel use, lowers carbon footprint
Tex-Eco incentives	Green machinery & processes	Energy efficiency, sustainability compliance

Policy & Industry Alignment

Focus Area	Tools/Initiatives	Impact
Traceability	Barcode, QR, blockchain	Transparent supply chains, ESG compliance
Digitalisation	AI, IoT in clusters	Predictive analytics, reduced waste
Circularity	PET recycling, fibre reuse	Lower carbon footprint, resource efficiency
3R Principles	Reduce, Reuse, Recycle	Sustainable production, global competitiveness

India's textile and MMF sector is moving toward **traceability, digitalisation, and circularity**, with strong emphasis on **3R principles (Reduce, Reuse, Recycle)**. The government and industry are deploying **barcodes, blockchain, and AI** to ensure transparent supply chains and compliance with sustainability standards.

- ✓ India is the fastest growing major economy globally
- ✓ India is placed at an advantageous demographic position which opens up a huge inhouse opportunity in the long term
- ✓ India eyeing an ambitious target both in domestic and export textile markets
- ✓ India is targeting a strong textile growth backed by investments in MMF
- ✓ The industry along with the Govt is working hand in hand towards this holistic goal
- ✓ To take International participation, to harmonise standards with acceptability of specifications – (amendment of existing standards or new standards) with International bodies like ISO as per ACFIF Working Committee Standards (ACFIF member countries possess more than 90% of global production base).
- ✓ To get Inputs/drafts for development of sustainability standard based on best practices
- ✓ Indian Govt is initiating all Sustainability goals in terms of using sustainable fibres/yarn through NFS, Tex-Eco scheme, waste value chain mapping through recycling, circularity to promote fibre to fibre reuse, targeting carbon emission, air & water pollution, renewable energy adoption and skilling (women in particular focusing Garment/Apparel sector) through SAMARTH 2.0
- ✓ Indian Govt is encouraging recycling (Polyester, Viscose, Nylon..) and industry is engaging at all levels to strengthen this objective

Thank You