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Tecoya Trend

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CMAI gears up to Host 3rd North India Garment Fair from 25- 27 November 2025 in New Delhi

By Our Staff Reporter

MUMBAI, NOV. 23—

The Clothing Manufacturers Association of India (CMAI) is all set to host the 3rd edition of the North India Garment Fair (NIGF 2025) from 25th–27th November, 2025, in New Delhi.

With participation from over 125 leading exhibitors and 5000+ trade visitors anticipated, the fair is poised to be a key driver of business growth and fashion trends.

Now in its third consecutive year, NIGF has become an important event for the garment industry in North India, providing insights into buyer preferences and demand outlook. The fair continues to play a vital role in enabling collaboration, expanding distribution, and elevating the profile of Indian apparel brands in one of the country's most dynamic retail regions. Following the success of its past editions,

The upcoming edition will be inaugurated by leading North Retailers, Ashutosh Gupta (Bindal Apparels, New Delhi); Naman Narang (Narang Garments, New Delhi); Ravindra Arora (Ravi Exclusif, Amritsar); Alok & Heramb Aggarwal (A to Z Kids House, Hisar); Laxmikant Biyani (Sagar, Sikar).

Speaking about the prospects, Santosh Katariya, President, CMAI, said, “The main aim of NIGF is to tap into the high-potential Northern market. It presents an unparallel opportunity for exhibitors to engage with buyers, discover brands, forge new partnerships and understand regional preferences. The introduction of a dedicated pavilion from Tirupur featuring more than 20 manufacturers will be a special attraction this year.”

Prominent brands showcasing their latest collection includes Watcher Shirts, Denis Parkar, Stil-O-Stitch, Scakhi, Juniper, Little Kangaroo, Kittens and many others from manufacturing hubs like Mumbai, Surat, Jaipur, Ahmedabad, Tirupur, Ludhiana, Kolkata including Delhi/NCR.

For the first time, a pavilion will feature leading manufacturers from Tirupur, the city known as the knitwear capital of India. Moreover, some of the key regional retailers who regularly visit the fair include Aristocrat Garments, Ludhiana; Suvidha Stores, Haryana; Stanmax, Delhi and Yougal Sons, Jammu & Punjab among many others.

The fair attracts North India’s retail network, including top agents, distributors, and large-format stores.

Italian textile machinery maker report order decline in Q3

By Our Staff Reprter

MUMBAI, NOV. 23–

In the third quarter of 2025, the orders index for textile machinery – compiled by ACIMIT’s Economics Department (the Association of Italian Textile Machinery Manufacturers) – recorded a 16% decrease compared to the same period in 2024. In absolute terms, the index stood at 41.8 points (base year 2021 = 100).

The decline reflects negative performances in both the domestic and foreign markets. Specifically, on the domestic market, orders fell by 17% compared to the same quarter of the previous year, with the absolute index value reaching 49.9 points.

Foreign orders also registered a 16% decrease compared to the third quarter of 2024, with an index value of 40.7 points. During the third quarter, the order backlog ensured four months of guaranteed production, slightly up from 3.9 months recorded in the second quarter.

Marco Salvadè, president of ACIMIT, commented: “The ACIMIT survey outlines a business climate where overall demand remains weak. In Italy the decline in order intake reflects the difficult period the textile supply chain is currently experiencing.” Mr. Salvadè added: “On foreign markets, however, we can see some signs of recovery. Although total order intake is still down compared to the first nine months of 2024, Italian textile machinery exports — based on official data for the first half of the year — show growth in some key markets such as India, Pakistan, and Egypt.” Finally, the main Asian trade show for textile machinery, ITMA ASIA + CITME 2025, has just concluded in Singapore, offering some reasons for optimism within the sector. Salvadè concluded: “I believe the 100 Italian exhibitors can be satisfied both with the number and quality of visitors and with the business prospects generated by the many contacts made during the exhibition. I hope that the work carried out at the trade fair will translate into a stronger order intake within a geopolitical context marked by reduced uncertainty.”

s.Oliver Advances End-to-End Digitalization with 3D and AI in Apparel Design

By Our Special Correspondent

MUMBAI, NOV. 23—

Digital sampling is increasingly redefining how apparel brands approach design and product development. The use of 3D and artificial intelligence tools is enabling faster decisions, leaner processes, and greater accuracy, while reducing the environmental impact of conventional sampling.

Speaking at the International Textile Manufacturers Federation (ITMF) Conference 2025 in Yogyakarta, Ms. Elizabeth Syiem, Manager R&D, s.Oliver Indonesia, said that the company’s adoption of digital technologies has moved from trial stage to full-scale implementation. She explained that s.Oliver, established in 1969 and now present in over 30 countries, began its digitalization journey in 2019 with 3D design and expanded it in 2023 by introducing AI capabilities.

She noted that s.Oliver operates an in-house 3D and AI team and additional vendor-based capacity across Indonesia and Vietnam. This structure, she said, has strengthened design collaboration, improved speed to market, and created greater operational alignment across sourcing bases.

According to her presentation, digital sampling supports virtual prototyping and realistic visualization, making collaboration more efficient across geographic boundaries. AI and 3D hybrid inputs allow style creation directly from mood boards, inspiration images, and best-selling products. This system also provides visualization for prints, embellishments, and graphics, helping designers and developers make quicker, more informed choices.

Ms. Syiem pointed out that the process links all stages of product development from concept and design input to 3D rendering and production. With the use of digital models, teams can review garments for fit, drape, and movement before creating physical samples. The company also uses virtual showrooms and digital catwalks to showcase collections more interactively.

The presentation also detailed the company’s Global Order Spot (GOS) platform, a B2B interface used by the sales team

Continued on Page 3

RELIANCE

RIL - PSF

0.8 Semi Dull	96.75
1.0 Semi Dull	94.00
1.2 Semi Dull	93.25
1.4 Semi Dull	92.50
2.0 Semi Dull	92.50
1.2 Super HT Brt	98.75
1.2 S HT (OW)	102.50
1.2 Opt. White	98.25
1.2 Super Black	103.75
1.4 Super Black	102.75
2.0 Semi Dull Tow	132.00
2.0 TBL TOW	144.00
2.0 Super Blk Tow	149.00
2.0/2.5 TBL	95.75

RIL - POY
Basic Price per Kg. (Plus GST Extra)

126/34 SD	92-50
122/72 SD	93-50
250/48 SD	88-50
51/14 SD	108-00
160/72 Brt	93-25
235/72 Brt	92-45

RIL - PTY
Ex-Factory Basic Prices (Freight and GST Extra)

75/34 SD HIM	115-25
75/34 SD NIM	112-00
155/48 SD HIM	107-25
155/48 SD NIM	106-00
81/72 FD HIM	129-25
81/72 CD IM	148-00
75/108 SD IM	122-50

RIL - FDY
Carton Ex-Factory Basic Prices (Freight and GST Extra)

70/36 SD	108-00
50/24 SD	112-00
50/36 Brt	114-00
75/36 Brt	107-00
150/48 Brt	102-00

Polyester RM
as on 17-11-2025

Px	$ -----
PTA	$610
MEG	$478

WELLKNOWN POLYESTER

SEMI DULL PRODUCT

80/108/MICRO	120
80/72/ROTO	112
75/72/SD ROTO	112
75/36 HIM	111
75/36 NIM	108
150/108/SIM	102
150/48 NIM	99
150/48/2 ROTO	101
150/48/ROTO	103
320/72/LIM	99
320/72/ROTO	100

FULL DULL PRODUCT

80/72/FD ROTO	122
80/72/2 FD ROTO	122

CATONIC PRODUCT

80/72/CAT ROTO	----
80/72/2CAT RO	----
130/DEN HM/GK	----
160/DEN DISCAT	----

BLACK PRODUCT

80/34/BL ROTO	119
80/72/BL ROTO	120
75/36 DDB NIM	115
150/48/DDB HIM	107
150/48/DDB NIM	106
300/96/DDB HIM	105

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Domestic cotton yarn prices in Rs. per kg.

Ne 20/1 Carded Hosiery Yarn	211.00	Ne 30/2 Carded Hosiery Yarn	246.00
Ne 20/1 Combed Hosiery Yarn	220.00	Ne 32/2 Combed Knitting Yarn	269.00
Ne 21/1 Carded Weaving Yarn	211.00	Ne 32/2 Carded Hosiery Yarn	250.00
Ne 26/1 Combed Hosiery Yarn	229.00	Ne 40/2 Combed Hosiery Yarn	296.00
Ne 30/1 Carded Hosiery Yarn	223.00	Ne 30/1 Combed Compact Wvg Yarn	249.00
Ne 30/1 Combed Hosiery Yarn	234.00	Ne 40/1 Combed Compact Wvg Yarn	268.00
Ne 32/1 Carded Weaving Yarn	224.00	Ne 50/1 Combed Compact Wvg Yarn	314.00
Ne 34/1 Combed Hosiery Yarn	246.00	Ne 16/1 Open End Yarn	161.00
Ne 40/1 Combed Hosiery Yarn	259.00	Ne 21/1 Open End Yarn	171.00
Ne 40/1 Carded Weaving Yarn	238.00	Ne 24/1 Open End Yarn	198.00

KINGDOM | TEXVENTURES

100% LINEN Yarns (Rs. per Kg.)

24NM/40LEA SB LF	Rs. 1,500/kg
26NM/44LEA SB LF	Rs. 1,600/kg
36NM/60LEA SB LF	Rs. 2,050/kg
39NM/66LEA SB LF	Rs. 2,350/kg
43NM/73LEA SB LF	Rs. 2,800/kg
50NM/83LEA SB LF	Rs. 3,800/kg
60NM/100LEA SB LF	Rs. 5,500/kg
75NM/125LEA SB LF	Rs. 6,900/kg

100% HEMP YARNS

15NM / 25LEA SB	Rs. 1,650 + GST
26NM /44LEA SB	Rs. 1,990 + GST
36NM /60LEA SB	Rs. 2,500 + GST
39NM /66LEA SB	Rs. 2,750 + GST

SB - SEMI BLEACH
LF - LONG FIBER

LINCELL (Lyocell/Linen 60/40)

9's/25LEA SB	Rs. 535/kg
14's/40LEA SB	Rs. 575/kg
21's/60LEA SB	Rs. 625/kg
24's/70LEA SB	Rs. 675/kg
28's/80LEA SB	Rs. 750/kg
36's/100LEA SB	Rs. 950/kg

EX-BHIWANDI

ARISUDANA INDUSTRIES

PRICES: LANDED SURAT / BHIWANDI - ADD RS. 3 FOR ICHALKARANAJI) GST EXTRA, LESS CASH DISCOUNT

VIRGIN VORTEX AIRJET SPUN YARN

SINGLE YARN	*RATE + GST*	*TFO YARN*	*RATE + GST*
15S - READY	163	2/15S - ON ORDER	-
20S - READY	138	2/20S - ON ORDER	-
24S - READY	143	2/24S - READY	158
30S - READY	148	2/30S - READY	166
40S - READY	168	2/40S - READY	193
60S - READY	190	2/60S - READY	230
76S - READY	230	2/76S - READY	283
100S - ON ORDER	-	2/100S - READY	428

RECYCLED GRS CERTIFIED VORTEX SPUN YARN

SINGLE YARN	*RATE + GST*	*TFO YARN*	*RATE + GST*
15S - READY	121	2/15S	130
20S - READY	125	2/20S	137
24S - READY	130	2/24S	145
30S - READY	135	2/30S	153
40S - ON ORDER	156	2/40S	180

RING SPUN VIRGIN YARN

SINGLE YARN	*RATE + GST*	*TFO YARN*	*RATE + GST*
10S	131	2/10S	138
15S	136	2/15S	146.5
20S	142	2/20S	156
24S	147	2/24S	163.8
30S	154	2/30S	175

Cotton Yarn Prices : Prices FOB Indian Port / LC at Sight per kg.

Ne 20/1 Carded Hosiery Yarn	USD 2.33	Ne 30/2 Carded Hosiery Yarn	USD 2.71
Ne 20/1 Combed Hosiery Yarn	USD 2.43	Ne 32/2 Combed Knitting Yarn	USD 2.97
Ne 21/1 Carded Weaving Yarn	USD 2.33	Ne 32/2 Carded Hosiery Yarn	USD 2.76
Ne 26/1 Combed Hosiery Yarn	USD 2.52	Ne 40/2 Combed Hosiery Yarn	USD 3.26
Ne 30/1 Carded Hosiery Yarn	USD 2.46	Ne 30/1 Combed Com Wvg Yarn	USD 2.74
Ne 30/1 Combed Hosiery Yarn	USD 2.58	Ne 40/1 Combed Comt Wvg Yarn	USD 2.95
Ne 32/1 Carded Weaving Yarn	USD 2.47	Ne 50/1 Combed Comp Wvg Yarn	USD 3.46
Ne 34/1 Combed Hosiery Yarn	USD 2.71	Ne 16/1 Open End Yarn	USD 1.77
Ne 40/1 Combed Hosiery Yarn	USD 2.85	Ne 21/1 Open End Yarn	USD 1.88
Ne 40/1 Carded Weaving Yarn	USD 2.62	Ne 24/1 Open End Yarn	USD 2.18

RSWM

1/30 PV 65/35	172-00
1/30 PC 48/52 (Combed/Hos)	202-00
1/30 POLY 100%	157-00
1/30 VSICOSE Kharach	210-00
1/30 Combed Cotton 100% (Hos)	257-00
2/30 PV 65/35	188-00
2/40 PV 65/35	211-00
2/30 PV 65/35 Dyed	225-00

Ex Mill Price in Rs./Kg., GST and Frieght is additional

COTTON CORPORATION OF INDIA

Branch	Variety	Parameters: Staple Length	Parameters: Micronairee	Price: Rs. per Candy
Akola	H4 MOD-Kasturi	28	3.7-4.7	52200
Akola	H4 MOD	28	3.7-4.7	51100
Aurangabad	BB MOD-Kasturi	29	3.7-4.5	52500
Aurangabad	BB SPL MOD -Kasturi	29	3.7-4.5	52500
Aurangabad	H-4 MOD -Kasturi	30	3.7-4.5	52800
Aurangabad	H-4 MOD -Kasturi	29	3.7-4.5	52500
Aurangabad	H-4 MOD -Kasturi	28	3.7-4.5	51100
Indore	H4 MOD	28	3.5-4.7	51100
Ahmedabad	S6 SUP	28	3.5-4.7	51400
Rajkot	S6 SUP-Kasturi	29	3.7-4.5	52800
Rajkot	S6 SUP	28	3.6-4.8	51400
Adilabad	BB MOD	30	3.5-4.7	51100
Warangal	BB MOD	30	3.5-4.7	51700
Warangal	BB MOD -Hihg Mic	30	4.9-5.5	51500
Warangal	BB SPL MOD	29	3.6-4.8	51400
Mahabubnagar	BB MOD-Kasturi	28	3.7-4.7	52200
Mahabubnagar	BB MOD	30	3.5-4.7	51700
Mahabubnagar	BB SPL MOD-Kasturi	29	3.7-4.5	52500
Mahabubnagar	BB SPL MOD-Kasturi	28	3.7-4.5	52200
Guntur	BB MOD	30	4.2-5.1	50700
Guntur	BB SPL MOD	29	4.2-5.1	50400
Guntur	MECH MOD	29	4.2-5.1	50100
Hubli	BB SPL MOD-Kasturi	30	3.7-4.5	52800
Hubli	BB SPL MOD-Kasturi	29	3.7-4.5	52500
Hubli	BB SPL MOD-Kasturi	28	3.7-4.7	52200
Rayagada	BB MOD-Kasturi	29	3.7-4.5	52500
Rayagada	BB MOD- Kasturi	28	3.7-4.7	52200
Rayagada	BB MOD- Platinum	30	3.5-4.3	52200
Rayagada	BB SPL MOD -Kasturi	31	3.7-4.5	53300
Rayagada	BB SPL MOD -Kasturi	29	3.7-4.5	52500
Rayagada	BB SPL MOD -Kasturi	28	3.7-4.7	52200

VASANTHA INDUSTRIES

SINGLE YARN COUNTS

NE 13s	KCW	CARDED COMPACT WEAVING YARN	209
NE 30s	KCW	CARDED COMPACT WEAVING YARN	231
NE 32s	KCW	CARDED COMPACT WEAVING YARN	234
NE 41s	KCW	CARDED COMPACT WEAVING YARN	258
NE 42s	KCW	CARDED COMPACT WEAVING YARN	260
NE 24s	KCH	CARDED COMPACT HOSIERY YARN	216
NE 30s	KCH	CARDED COMPACT HOSIERY YARN	226
NE 32s	KCH	CARDED COMPACT HOSIERY YARN	231
NE 40s	KCH	CARDED COMPACT HOSIERY YARN	247
NE 16s	KC SLUB	CARDED COMPACT SLUB	229
NE 21s	KC SLUB	CARDED COMPACT SLUB	234
NE 30s	KC SLUB	CARDED COMPACT SLUB	251
NE 31s	KC SLUB	CARDED COMPACT SLUB	253
NE 40s	KC SLUB	CARDED COMPACT SLUB	277
NE 24s	CCW SLUB	COMBED COMPACT SLUB	264
NE 32s	CCW SLUB	COMBED COMPACT SLUB	277
NE 60s	CCW SLUB	COMBED COMPACT SLUB	372
NE 2/32s	SIRO YARN	CARDED COMPACT ELI TWIST	216
NE 2/42s	SIRO YARN	CARDED COMPACT ELI TWIST	228
NE 1/40s	PSF	100% POLYESTER MICRO DENIER	167
NE 1/50s	PSF	100% POLYESTER MICRO DENIER	187
NE 1/60s	PSF	100% POLYESTER MICRO DENIER	194

GASSED MERCERISED COUNTS

COUNT			HANK	CONE
NE 2/40s		COMBED GASSED MERCERISED	485	525
NE 2/40s	CCGM	COMBED COMPACT GASSED MERCERISED	485	555
NE 2/60s	CCGM	COMBED COMPACT GASSED MERCERISED	565	635
NE 2/66s		COMBED GASSED MERCERISED	575	645
NE 2/74s	CCGM	COMBED COMPACT GASSED MERCERISED	592	675
NE 2/80s	CCGM	COMBED COMPACT GASSED MERCERISED	615	727
NE 2/100s	CCGM	COMBED COMPACT GASSED MERCERISED	727	827

PALLAVAA GROUP

(Exmill Price/Kg)

Counts	100% Viscose 5%		100% Lenzing EcoVero 5%		100% Livaeco 5%	Cotton Viscose 52/48 (5%)	100% Lenzing MicroModal 5%		Cotton/Modal 5%		Supima/ MicroModal 5%	100% Bamboo 5%	Cot Poly LLT 5%	Poly/Cot LLT 5%	Tencel (12%)		Tencel LF/Cot 5%	100% Birla MM 5%	100% Poly 5%	PV 65/35 5%
	RING	*LLT*	*RING*	*LLT*	*LLT*	*RING*	*RING*	*LLT*	*52/48*	*60/40*	*52/48*	*RING*	*60/40*	*65/35*	*A100*	*LF*	*48/52*	*RING*	*LLT*	*LLT*
20/1-	215	197	240	240	230	248	375	370	320	315		235	228	203	475	350	335	355	160	177
24/1-	220	202	245	245	235	253	380	375	325	320		240	233	208	480	355	340	360	165	182
30/1-	225	207	250	250	240	258	385	380	330	325	570	245	238	213	485	360	350	365	170	187
34/1-	235	217	260	260	250	268	395	390	340	335	585	255	248	223	495	370	360	375	180	197
40/1-	255	237	280	280	270	288	415	410	360	355	610	275	268	243	515	390	380	395	200	217

KENNIGTON INDUSTRIES

Price in Rs. per Kg. - Ex- Bhiwandi

20/1 Poly Ring Spun Virgin	137+GST
24/1 Poly Ring Spun Virgin	141+GST
30/1 Poly Ring Virgin Knitting/Waterjet	144+GST
30/1 Poly Ring Spun Virgin weaving	143+GST
40/1 Poly Ring Spun Virgin Weaving	158+GST
40/1 Poly Ring Waterjet/ Knitting	162+GST
30/1 Poly Siro Compact (Warp)	188+GST
40/1 Poly Siro Compact (Warp)	203+GST
50/1 Poly Siro Compact (Warp)	213+GST
27/1 Poly Tiger Slub	154+GST
27/1 Poly Lousiana 45 Kg.	156+GST
30/1 Poly Vortex	148+GST
40/1 Poly Magic Lot.8022	162+GST
40/1 Poly Micro Magic Lot-803	162+GST
12/1 CP 52/48 Arrow	170+GST
16/1 CP 52/48 Arrow	175+GST
27/1 CP 52/48 ARROW	185+GST
30/1 Viscose Silver	193+GST
30/1 Viscose Vortex	200+GST
30/1 Lyocell Vortex	210+GST
40/1 Lyocell Compact	262+GST
30/1 PV Warp	168+GST
42/1 PV Warp	188+GST
20/1 Lyocell Slub NASA	267+GST
20/1 Lyocell Cotton NIMBUDA	257+GST
31/1 Cotton Lyocell Plain	237+GST
34/1 Combed Cotton Lyocell	240+GST
41/1 Cotton Lyocell Plain	257+GST
20/1 Milk (Cotton Lyocell (52/48)	255+GST
20/1 Ice (Cotton Lyocell (52/48)	255+GST
20/1 Butter (Cotton Lyocell (52/48)	260+GST
30/1 Amul (Cotton Lyocell (52/48)	280+GST
20/1 OTP (Lyocell Linen 80/20)	375+GST
20/1 Chips Poly Cotton Linen	230+GST
20/1 Silvi Lyocell Cotton Linen	350+GST

GREY CLOTH

PEE VEE TEXTILES LTD.

100 % COTTON GREIGE FABRIC
(ALL COMBED COMPACT YARN)

Quality	Weave	Ex Rate +GST	BCI Rate
30 Compact x 30 Compact / 124 x 64 - 63"	2/1	86.00	89.00
40 Compact x 40 Compact / 120 x 96 - 63"	1/1	87.00	90.00
50 Compact x 50 Compact / 132 x 80 - 63"	1/1	78.00	81.00

STRETCH GREIGE FABRIC

30 Comp x 20 K Spandex (70d) / 160 x 90 GOL Dobby 73" 156.00

40 Comp x 30 Cw Spandex (40d) / 88 x 72 GOL 1/1 74" 89.00

CUT-CORDUROY GREIGE FABRIC

40 Comp x 30 Comp / 84 x 130 Corduroy 66" 120.00

JACQUARD DESIGN GREIGE FABRIC

50 Comp x 50 Comp / 144 x 94 (On Loom) Jacquard 65" 155.00
with Name Writing Jacquard Selvedge.

60 Comp x 60 Comp / 110 x 88 Jacquard 67" 130.00
with Name Writing Jacquard Selvedge.

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Cotton Market Fundamentals and Price Outlook

RECENT PRICE MOVEMENT

Most cotton benchmarks were flat or lower over the past month.

* After dropping through support around 66 cents/lb in late September, the December NY/ICE futures contract attempted a recovery. In late October, it rebounded back to 66 cents, but it was unable to break above the former support level. In the latest trading, values retested recent lows and slipped to 62 cents.

* The March NY/ICE futures contract has been trading at a premium to December, with the margin as wide as three cents/lb over the past month. More recently, the margin and price level for the March contract have decreased, with recent values near 64 cents/lb.

* The A Index traded between 74 to 78 cents/lb over the past month.

* The Chinese Cotton Index (CC Index 3128B) was steady, holding to near 94 cents/lb in international terms and near 14,750 RMB/ton in domestic terms. The RMB was consistently near 7.12 RMB/USD.

* Indian spot prices (Shankar-6 quality) decreased from 78 to 74 cents/lb or from 54,800 to 51,700 INR/candy. The INR traded around 88 INR/USD.

* Pakistani spot prices were steady near 68 cents/lb or 15,600 PKR/maund over the past month. The PKR held near 281 PKR/USD.

SUPPLY, DEMAND, & TRADE

Since the U.S. government entered a shutdown on October 1st, there was not an update to USDA supply, demand, and trade figures last month. However, even before negotiations began to make progress, the USDA had been planning to release a series of updated estimates in November.

In the numbers released in November, the largest change was the increase to global production (+2.4 million bales to 120.1 million). This was primarily due to upward revisions for China (+1.0 million bales to 33.5 million), the U.S. (+891,000 bales to 14.1 million), and Brazil (+500,000 bales to 18.8 million).

There was virtually no change to the global mill-use forecast (-50,000 bales to 118.9 million). And, there was no country-level change to mill-use over 100,000 bales.

Historical revisions lifted 2025/26 beginning stocks +426,000 bales (to 74.5 million).

The net effect of changes for global production, consumption, and stocks was a +2.8 million bale increase to the projection for 2025/26 ending stocks (to 75.9 million). This volume equals the level from 2022/23 and represents the highest level of stocks since COVID (83.7 million bales in 2019/20).

The global trade forecast increased +300,000 bales (to 44.0 million). In terms of imports, the only notable country-level change was for China (+200,000 bales to 5.4 million). For exports, notable country-level changes were for Brazil (+200,000 bales to 14.5 million), the U.S. (+200,000 bales to 12.2 million) and Tanzania (-100,000 bales to 200,000).

PRICE OUTLOOK

Even in the absence of USDA reporting during the government shutdown, there was no shortage of developments affecting cotton supply chains, with several significant policy announcements over the past month.

Chief among these were those associated with meeting between the leaders of the U.S. and China. Ahead of the meeting, both the U.S. and China announced updated trade deals with other partner countries in Asia. China refreshed a free trade agreement already established with ASEAN, while the U.S. announced agreements or frameworks with Cambodia, Malaysia, Thailand, and Vietnam. Each of the published results from the U.S. meetings included encouragement for increased U.S. agricultural exports, but there were no specific purchase agreements for cotton in any of the documents released.

The same was true for the Executive Order that was released after the meeting between the U.S. and China. That text indicated China agreed to purchases of U.S. soybeans, sorghum, and logs, but it did not mention cotton.

A key feature of the agreement announced by the U.S. and China was that it lowered tariffs on U.S. imports from China by 10 percentage points (ppt). Before the meeting, the U.S. was imposing a 30ppt increase on Chinese imports (20ppt of "fentanyl" tariffs and 10ppt of "reciprocal" tariffs). Following the recent reduction, the total addition for tariffs from China in 2025 is 20ppt.

This level is near the average increase that many other major apparel exporters are facing. Although Chinese shipments continue to be subjected to a 7.5ppt addition that has remained in effect since the first round of the trade dispute (7.5ppt since the Phase One Deal), the recent agreement reduced or eliminated the separation in rates China was facing through 2025 tariff increases. For comparison, the 2025 tariff increases faced by the other largest apparel exporters to the U.S. are also near 20ppt (Vietnam 20ppt, Bangladesh 20ppt, India 50ppt with 25ppt reciprocal tariff and another 25ppt for trade in Russian oil, and 19ppt for Cambodia).

Another feature of the Executive Order published after the meeting between the U.S. and China were comments suggesting general agreement from both sides to lower obstacles to trade and to then maintain those policies into the future. China committed to suspend or remove certain retaliatory actions, including suspending tariffs on a range of U.S. agricultural goods until the end of 2026. The U.S. agreed to maintain its suspension of heightened reciprocal tariffs on China until November 10, 2026. While anything is possible, these statements suggest further tariff adjustments could be limited over the next twelve months, and stability in tariff rates could support confidence around order placement.

Relatedly, questions remain about the outlook for the demand side of the market. U.S. end-use consumption (finished textiles and apparel bought by consumers) represents about 15% of global mill-use. Change in U.S. demand resulting from price effects around tariffs may have a direct effect on fiber use. But, larger impacts could be indirect, stemming from slower economic growth that could be more widespread.

The International Monetary Fund (IMF) released updated forecasts for world GDP in October. Their figures for world GDP were flat or higher relative to those published in July (+0.2ppt to 3.2.% for 2025 and unchanged for 2026 at 3.1%). The IMF highlighted downside risks, but the latest estimates suggest only slight decelerations in global growth compared to 2024 (3.3%).

New US sanctions threaten to disrupt India's Russian oil lifeline

NEW DELHI, NOV. 23-(PTI)

India's imports of Russian crude oil - the feedstock for fuels like petrol and diesel - are expected to drop sharply in the near term but not halt entirely as new US sanctions on Moscow's top oil exporters take full effect, analysts said.

US sanctions on Rosneft and Lukoil, and their majority-owned subsidiaries, took effect on November 21, effectively turning crude linked to these firms into a "sanctioned molecule".

India's crude oil imports from Russia, averaging 1.7 million barrels per day (bpd) this year, remained firm ahead of the cutoff, with November arrivals projected at 1.8-1.9 million bpd, as refiners maximise discounted purchases. But flows are expected to drop noticeably in December and January, with analysts estimating near-term declines to around 4,00,000 bpd.

Traditionally, reliant on Middle Eastern oil, India significantly increased its imports from Russia following the February 2022 Ukraine invasion.

Western sanctions and reduced European demand made Russian oil available at steep discounts. As a result, India's Russian crude imports surged from under 1 per cent to nearly 40 per cent of its total crude oil imports in a short span. In November, Russia continued to be India's top supplier, making up for about a third of all crude oil imported by the country.

KEN ENTERPRISES

Quality	Weave	Composition	Ex-Mill Rate/Meter (Excluding GST)
16*12 / 96*57 63"	3/1 TWILL	100% COTTON	102.75
6*12 / 96*57 63"	3/1 TWILL	100% COTTON	100.00
20*20 / 60*60 50" (CD*CD)	1/1 PLAIN	100% COTTON	56.75
20 SLUB*20 SLUB / 56*48 63"	1/1 PLAIN	100% COTTON	65.75
30 VISCOSE*30 VISCOSE / 52*58 63"	DOBBY	100% VISCOSE	48.75
40 VISCOSE*40 VISCOSE / 90*82 63"	DOBBY	100% VISCOSE	68.50
40*40 / 100*80 63"	DOUBLE CLOTH	100% BCI COTTON	68.25
40*40 / 100*80 63"	DOUBLE CLOTH	100% ORGANIC COTTON	76.50
40 SLUB*40 SLUB / 108*106 63"	DOUBLE CLOTH	100% COTTON	92.75
40*40 / 56*44 63"	1/1 PLAIN	100% ORGANIC COTTON	42.75
40*40 SPDX / 96*72 74" RS	1/1 PLAIN	97% COTTON : 3% SPANDEX	86.00
40*40 VISCOSE / 84*64 63"	1/1 PLAIN	58% COTTON : 42% VISCOSE	54.25
50*50 / 88*84 63"	DOUBLE CLOTH	100% ORGANIC COTTON	67.50
60*60 / 160*120 63"	TRIPLE CLOTH	100% COTTON	97.75
60*60 / 92*86 63"	1/1 PLAIN	100% BCI COTTON	56.00
60*60 VISCOSE / 90*80 63"	1/1 PLAIN	53% COTTON : 47% VISCOSE	58.75
80*60 / 84*64 63"	1/1 PLAIN	100% COTTON	47.00
80*80 / 92*86 63"	1/1 PLAIN	100% COTTON	56.50
100*100 / 227*150 63"	4/1 SATIN	100% COTTON	146.50
100*100 / 92*88 63"	1/1 PLAIN	100% COTTON	69.50

s.Oliver Advances End-to-End Digitalization with 3D & AI

Continued from Page 1 Col 6

to display and book orders for digital styles. The final 3D rendered SMS images are uploaded to this platform, providing a direct bridge between design creation and commercial execution.

She said that these systems have delivered measurable advantages, including reduced sample waste, lower carbon footprint, faster response times, and improved product personalization. Digital workflows also make it possible to carry out more iterations within shorter timelines, supporting flexibility and innovation.

To enable this transition, Ms. Syiem explained that s.Oliver has invested in hardware, software, and training. The company has built a creative and technical team, initiated vendor training programs, and established proof of concept models to ensure consistent quality. She emphasized that mindset remains key, as digital adoption must be viewed as an end-to-end evolution and not a temporary trend.

In closing, she pointed out that realism and accuracy in digital visualization are essential for broader acceptance. Achieving life-like digital renderings, she said, enhances credibility and strengthens confidence across design, sourcing, and marketing teams.

Prices steady

By Cotton Man

MUMBAI, NOV. 22—

The cotton prices maintained a steady trend across all the markets today.

	Quality	Rate	Arrival in Bales State Wise
NORTH ZONE (RATES IN MAUND) (* 1 Maund = 37.324 KG.)			
Punjab	J-34 RG	5160-5200	600
Haryana	J-34 RG	4940-5000	5000
Rajasthan	J-34 28.5 mm	4950-5220	9000
Lower Rajasthan in Candy	J-34 28.5 mm	50500-51500	7000
CENTRAL ZONE (RATES IN CANDY) (1 Candy = 355.6188 KG.)			
Gujarat			
	V-797 (Kalayan) 22 mm	38700-39200	
	S6 28.5 mm	51500-51700	
	S-6 29.0 mm	51700-52200	20000
Maharashtra			
	MECH 1 - 29-30 mm	50500-51000	
	MECH 1-30 mm (RD 75)	51000-51500	
	MECH 1-30 mm (RD 75)	51500-52000	
	MCU-5 (Sillod) 31 mm	52500-53000	20000
Madhya Pradesh			
	MECH-1 29 mm RD 72	48800-49300	
	MECH -1 29 mm RD 74-75	50500-51500	
	MECH -1 30 mm RD 74-75	52000-52500	
	DCH-32 33-35 mm	72000-75000	15000
SOUTH ZONE (RATES IN CANDY)			
Andhra Pradesh			
	Bunny/Brahma (Telangan) 29-30 mm	51000-52000	
	MECH - 1 (Telangan) 29-30 mm	51000-52500	
	MCU-5 (AP) 30 mm	50000-51500	35000
Karnataka			
	Bunny / BT 29 mm	50500-51000	
	MCU-5 30 mm	51000-51500	
	DCH-32 33-35 mm	---------------	15000
TAMIL NADU			
	MCU-5 30 mm	51500-52000	
	Suvin 33-38 mm	---------------	1300
ORISSA			
	MCU-5 30 mm	53000-53500	200
	Total Arrivals		**1,29,900**

Indian Cotton Federation

(Per Candy 2025-26 Crop)

V-797 (Guj)	39000	MCU-5 (AP)	51800
J-34 (RG) (Punj)	49365	DCH-32 (Karna)	--------
MECH-1/H-4 (MP)	50000	MECH -1 (Maha)	51200
Sankar-6 (Guj)	51500		#

COTTON ASSOCIATION OF INDIA

2025-26 COTTON SEASON

State	Staple	Mic	Per Candy
P/H/R	Below 22 m	5.0-7.0	43800
GUJ	22mm	4.0-6.0	--------
M/M(P)	23mm	4.5-7.0	--------
P/H/R(U)	27mm	3.5-4.9	46900
P/H/R(U)	27mm	3.5-4.9	47500
M/M(P)/SA/TL/	G27mm	3.0-3.4	--------
M/M(P)/SA/TL	27mm	3.5-4.9	--------
P/H/R(U)	28mm	3.5-4.9	49000
M/M(P)ICS-105	28mm	3.7-4.9	50200
SA/TL/K	28mm	3.7-4.9	--------
GUJICS-105	28mm	3.7-4.9	-------
R(L)ICS-105	28mm	3.7-4.9	50300
R(L)ICS-105	29mm	3.7-4.9	51300
M/M(P)ICS-105	29mm	3.7-4.9	51100
SA/TL/K	29mm	3.7-4.9	50200
GUJ ICS-105	29mm	3.7-4.9	51900
M/M(P ICS-105	30mm	3.7-4.9	52100
SA/TL/K/O	30mm	3.7-4.9	51300
M/M(P)ICS-105	31mm	3.7-4.9	52700
SA/TL/K/TN/O	31mm	3.7-4.9	--------
SA/TL/K/TN/O	32mm	3.5-4.9	--------
M/M(P)ICS-107	34mm	2.8-3.7	--------
K/TNICS-107	34mm	2.8-3.7	--------
M/M(P)ICS-107	35mm	2.8-3.7	72000
K/TNICS-107	35mm	2.8-3.7	75000

U.S. Futures Daily Cotton Market

19 November 2025

Contract	Open*	High	Low	Close *	Settle	Change
Dec '25	62.50	63.12	62.27	62.43	62.30	-0.27
Mar '26	64.39	64.69	63.75	63.94	63.78	-0.61
May '26	65.58	65.84	65.00	65.19	65.03	-0.54
Jul '26	66.65	66.88	66.09	66.62	66.12	-0.50
Oct '26					67.11	-0.37

** Open and Close prices reflect the first and last trade in the market and do not correlate to any opening or closing period*

Cotlook 'A' Index : 74.30

RISE 2025 Showcases Breakthrough Technologies and Sustainability Insights Driving Future of Nonwovens

MUMBAI, NOV. 23—

Industry innovators, technology scouts, and business leaders gathered in Raleigh, North Carolina, for the RISE (Research, Innovation & Science for Engineered Fabrics) Conference, co-hosted by INDA and The Nonwovens Institute (NWI) at North Carolina State University. The event, held October 14–15 at the McKimmon Center, featured cutting-edge advancements, graduate research, and forward-looking discussions shaping the sustainable future of nonwoven materials.

2025 RISE INNOVATION AWARD

The RISE Innovation Award honors technical breakthroughs that advance nonwoven science and engineering toward commercialization. The 2025 RISE Innovation Award winner is Keel Labs for their Kelsun fiber.

KELSUN FIBER BY KEEL LABS

Kelsun fiber, developed by Keel Labs, is the world's first high-performance seaweed-based fiber. Plastic-free and tree-free; the combined properties of Kelsun allow it to outperform all other fibers without shedding harmful microplastics. This breakthrough material brings extreme softness, high absorptivity, inherent flame resistant and antimicrobial properties, in addition to unmatched biodegradability. Engineered to integrate into existing nonwoven manufacturing, Kelsun fiber delivers a revolutionary material that combines performance with sustainability for next-generation consumer and industrial products.

The RISE Innovation Award finalists exemplified innovation, sustainability, and impact and included:

* EsterCycle by EsterCycle, LLC

A low-cost, low-emissions chemical recycling technology capable of safely processing biohazard-contaminated PPE and mixed polyester nonwovens, returning valuable material back into the supply chain.

* Fentanyl Detection Wipe by Rockline Industries

A groundbreaking wipe that rapidly changes color upon contact with trace amounts of fentanyl, giving first responders and law enforcement a safe, fast, and reliable tool to identify dangerous opioids in the field.

Hempitecture, Inc. earned the 2024 RISE Innovation Award for its PlantPanel, a 100% biobased rigid insulation material combining thermal efficiency, acoustic performance, and sustainability in a single, easy-to-install product.

RISE 2025 EVENT HIGHLIGHTS

RISE delivered a forward-looking program centered on sustainability and innovation, featuring sessions on bio-based materials, circular economy strategies, renewable carbon, green chemistry, advanced recycling, and microplastics mitigation—along with trade, tariff, and policy updates shaping the industry's future.

KEYNOTE PRESENTATIONS

Renewable carbon and green chemistry were featured in two keynote presentations from Lars Börger, PhD, CEO, nova-Institute GmbH and John Warner, PhD, CEO & CTO, The Technology Greenhouse. Dr. Börger demonstrated how molecular-level design decisions can accelerate circularity and renewable innovation in materials manufacturing. Dr. Warner highlighted how a renewable carbon economy can drive innovation, efficiency, and climate goals across the nonwovens and textiles industries.

"RISE continues to spotlight the technologies that are redefining what's possible in nonwovens," said Matt O'Sickey, PhD, INDA's Director of Education & Technical Affairs. "From renewable carbon and green chemistry to next-generation fibers and recycling innovations, this year's conference showcased the kind of collaboration and creativity that will shape a more sustainable future for our industry."

NETWORKING & ENGAGEMENT

RISE 2025 fostered exceptional networking and collaboration through:

* A charity golf tournament supporting graduate student travel to INDA events

* Tabletop exhibits highlighting cutting-edge materials and technologies

* A tour of The Nonwovens Institute's $65+ million pilot lines and analytical labs