

**Primus Report**

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## **Primus Partners Unveils Roadmap To Propel India's Textile Exports To US\$ 100 Bn In Next Five Years**



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**Article Content:**

Primus Partners, a leading Indian management consulting firm, has unveiled a comprehensive roadmap to drive India's textile exports to US\$ 100 billion over the next five years. Anchored in a six-point strategy, the roadmap outlines key recommendations to diversify export offerings, integrate Industry 4.0, increase skilled manpower, enhance infrastructure and build industry capacity. Launched at a time of shifting global trade dynamics and new tariff alignments, the roadmap positions India to become a preferred sourcing destination and a global leader in textile manufacturing. Over the last few years, the India's textile and apparel exports have not shown the desired momentum, with exports touching US\$ 36.61 billion in FY2025.

"These six strategic recommendations serve not just as directional guidance but as a comprehensive blueprint to accelerate the growth of India's textile industry. By diversifying export products, expanding into new markets, attracting investments, strengthening logistics and infrastructure, and building long-term capacity, we believe India is well-positioned to significantly enhance its global standing in textiles," says Kanishk Maheshwari, co-founder and Managing Director, Primus Partners.

"On the policy front, the implementation of reciprocal tariffs represents more than just relief, it is a defining opportunity for India to emerge as a preferred sourcing hub for the US market. Furthermore, the recent Free Trade Agreement with the UK presents a pivotal moment to strengthen the industry's global competitiveness. With a focused approach and timely execution, these recommendations have the potential to propel India's textile exports to US\$ 100 billion over the next five years, firmly establishing the nation as a global leader in textile manufacturing," adds Maheshwari.

The document titled 'Roadmap for US\$ 100 billion Exports in 5 Years: Six Recommendations that will drive the Textile Industry' talks about integration of Industry 4.0 in the textile sector, which will lead to around a 15 per cent reduction in operational waste.

The report says that the implementation of Industry 4.0 technologies is significantly transforming the textile sector, enhancing operational intelligence, efficiency and responsiveness to global market demands. Textile manufacturing units are increasingly adopting advanced solutions such as IoT-enabled looms, AI-based quality inspection systems and automated dyeing technologies. According to

estimates, mills leveraging real-time data for monitoring energy usage and production processes reported a 15 per cent reduction in operational waste and a 20 per cent decrease in machine downtime.

For instance, in one spinning cluster, the implementation of predictive maintenance strategies holds a potential to prevent over 40 hours of equipment downtime annually, highlighting its effectiveness in enhancing operational efficiency. This digital transformation is also redefining workforce roles shifting from manual operations to data-driven monitoring, interpretation and decision-making via dashboards and predictive alerts. For example, textile units employing energy monitoring systems have achieved a 12–15 per cent reduction in electricity costs within the first year of implementation.

In its recommendations, the report says that encouraging Free Trade Agreements (FTAs) will boost India's textile competitiveness significantly. To compete effectively and expand market access, India must negotiate FTAs with key markets like the US and EU. Such agreements would reduce tariffs on Indian textile exports, making them more price-competitive globally.

The Primus Partners report has urged the policy makers to strengthen existing operational subsidies as this will enhance industry's advantage. Operational subsidies have the potential to significantly strengthen the global competitiveness of India's textile sector. By reducing key input costs such as energy, logistics and labour these subsidies enable manufacturers to produce more cost-effective goods, thereby improving their position in international markets. Fiscal incentives, particularly employment-linked subsidies, play a crucial role in this regard. For example, the state of Madhya Pradesh offers a reimbursement of employee contributions of up to Rs 6,000 per month for a period of five years, which substantially lowers operational expenditures for textile units. Such measures not only incentivize new investments in garment manufacturing but also help reduce labour costs and enhance overall profitability, positioning India as a more attractive hub for textile production globally.

To ensure long-term dominance in the global textile market, the report says that it is essential to nurture and handhold India's textile MSMEs, enabling their transition into large-scale, globally competitive enterprises. These MSMEs form the backbone of the industry, contributing significantly to employment, regional development and export value. However, they often face barriers related to limited access to finance, technology, skilled manpower and global market linkages.

Through targeted support such as access to credit, infrastructure, advanced machinery, skilling programmes and integration into global value chains these small units can scale operations, improve productivity and enhance product quality. Empowering MSMEs to evolve into large textile giants will not only increase India's export share but also solidify its position as a leading global textile manufacturing hub. Additionally, the government can play a pivotal role in aggregating MSMEs, similar to how Farmer Producer Organizations (FPOs) support small farmers in the agriculture sector. By facilitating the formation of MSME clusters and cooperatives, the government can help small businesses negotiate directly with buyers, ensuring better pricing, market access and supply chain efficiency.

The report has urged the policy makers to continue its focus on driving growth and exports through technical textiles. The global technical textile market is expected to grow from US\$ 212 billion in 2022 to US\$ 274 billion by 2027. India's market share is projected to reach around US\$ 39 billion by 2027, contributing significantly to the vision of achieving US\$ 100 billion in textile exports. The launch of the National Technical Textile Mission provides the necessary impetus to nurture this high-investment, high-output segment. The mission focuses on research and development, skill development, market promotion and export facilitation. To maximize the impact of this initiative, states should consider launching their own technical textile missions tailored to local strengths and needs. These state-level missions can promote targeted research, build region specific skills and support innovation ecosystems

Additionally, the report says that the government departments should earmark dedicated funds for the procurement and use of technical textile products, creating consistent market demand and encouraging private sector participation. The growth of technical textiles will not only boost exports but also drive advancements in technology and livelihood opportunities across related sectors.

The Primus Partners report has recommended establishing specialized training centres in key textile hubs, focusing on Tier 2 and Tier 3 cities and thus raising the share of skilled workforce to 50 per cent. The textile industry continues to rely heavily on informal, on-the-job learning, with only a small proportion

of the workforce formally trained, resulting in an estimated 20–30 per cent loss in productivity for employers.

Despite housing majority of textile manufacturing units, these cities face a pronounced shortage of formal training institutions. With PM MITRA Parks coming up in these cities, the focus on practical, industry-relevant training in areas such as garment stitching, quality assurance, pattern-making and the operation of modern textile machinery will increase. With foreign buyers increasingly prioritizing certified and skilled labour especially in the context of sustainability and compliance such initiatives are critical, says the report.