

## ACTIVITIES OF THE ASSOCIATION FOR THE MONTH OF DECEMBER 2025

### MEMBERSHIP UPDATES

#### 1. MEMBERSHIP OF THE ASSOCIATION

Total Membership strength of CMAI as on 1<sup>st</sup> December 2025 stood at 7240 including 2135 affiliated Members from 5 Regional Associations.

CMAI on-boarded 47 New Companies as Members in the month of December 2025 which are as under

REGION	PRIMARY	ASSOCIATE	AGENT / DISTRIBUTOR	RETAILER	GRAND TOTAL
MUMBAI	12	5	-	-	17
WESTERN INDIA	-	-	-	-	-
SOUTHERN INDIA	-	1	-	-	1
NORTHERN INDIA	3	4	2	-	9
EASTERN INDIA	2	-	-	-	2
GUJARAT REGION	12	5	-	1	18
<b>GRAND TOTAL</b>	<b>29</b>	<b>11</b>	<b>2</b>	<b>1</b>	<b>47</b>

#### RENEWAL OF MEMBERSHIP WITH THE ASSOCIATION

The Association received Membership Renewals from 3 Members in Primary Member Category during the Month of December 2025 . They are as under :

REGION	PRIMARY	ASSOCIATE	AGENT / DISTRIBUTOR	RETAILER	GRAND TOTAL
MUMBAI	2	-	-	-	2
WESTERN INDIA	-	-	-	-	-
SOUTHERN INDIA	-	-	-	-	-
NORTHERN INDIA	-	-	-	-	-
EASTERN INDIA	-	-	-	-	-

#### THE CLOTHING MANUFACTURERS ASSOCIATION OF INDIA

901, Naman Midtown, A Wing, Behind Kamgar Kala Kendra, Senapati Bapat Marg, Prabhadevi West,  
Mumbai 400 013 • Tel : +22-44750909 • Email : [info@cmai.in](mailto:info@cmai.in) • Website : [www.cmai.in](http://www.cmai.in)  
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CENTRAL INDIA	-	-	-	-	-
GUJARAT REGION	1	-	-	-	1
<b>GRAND TOTAL</b>	<b>3</b>	-	-	-	<b>3</b>

There are 691 Members whose Subscription for the current Financial Year is still pending. We had requested thru an e-mail dated 18<sup>th</sup> October 2025 as well as through Personal calls ,to those Members to send their Renewals at the earliest to avoid uninterrupted Services and keeping them in the Inactive List. We have also informed them that Members can Pay their Renewals through the following Link or NEFT or by a Crossed Cheque.

[https://cmai.in/membership\\_form/public/members/login](https://cmai.in/membership_form/public/members/login)

The Bank Details of the Association for NEFT/RTGS are as under :-

Name of Beneficiary: **CMAI Membership A/c.**

Bank Name: **HDFC Bank** , IFSC CODE: **HDFC0000005**

Account Number: **00051450000092**

### ONE MEMBERSHIP – MANY SOLUTIONS

## TO ENTER THE LARGEST STAGE OF INDIAN MARKET

**BECOME A CMAI MEMBER @**



\*PER DAY (T&C APPLY)

**IF YOU DON'T BECOME A MEMBER...**  
**YOU CAN CONTINUE READING THIS MESSAGE**

**TO JOIN CMAI, CALL 9820492829**

Head office: 901, Naman Midtown, A-Wing, Behind Kamgar Kala Kendra, Senapati Bapat Marg, Prabhadevi (West), Mumbai 400 013.  
Branches : Pune | Surat | Bengaluru | New Delhi  
022-4475 0909 info@cmai.in www.cmai.in Follow us on:    

**BECOME A CMAI MEMBER TO AVAIL IN-HOUSE SERVICES FOR \*RECOVERY & DISPUTE SETTLEMENT WITH BUYERS**

**CMAI CONCILIATION & ARBITRATION**




**RECOVERY DONE FOR 150+ MEMBERS ACROSS 450+ CITIES IN INDIA IN FY 2024-25**

**TO LEARN MORE, CALL 9820492829**

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There are 12 Key Reasons to Join CMAI : Founded in 1963, CMAI is one of \*India's oldest and largest Association for the Textile & Apparel Industry\*, representing the interests of the Indian Brands and Manufacturers . To know more about Categories & fees : <https://bit.ly/4mSUgGI> Website : <https://cmai.in/membership/> To Call : 098204 92829

Our Patronage Members are requested to introduce more Manufacturer Members through their contact to CMAI and strengthen the Association for One Voice on any issues that will be connected with the Industry. For Extraordinary Growth Opportunities - **CMAI Membership is your Best Option.**

## CONCILIATION & ARBITRATION SUMMARY REPORT FOR THE MONTH OF NOVEMBER & DECEMBER 2025

MIS FOR THE PERIOD OF	NOV' 2025		DEC' 2025	
	No. of Files	Amount	No. of Files	Amount
Opening Total Cases pending resolution	472	₹ 15,12,25,466	464	₹ 14,39,50,280
New Complaints	19	₹ 19,25,311	34	₹ 36,07,611
Complaints resolved fully in the Month	11		17	
Cases Transferred to Caution List	16	₹ 44,72,637	19	₹ 46,45,104
Amount to be Reduced in the Month		₹ 47,27,860		₹ 53,35,800
Total Cases pending resolution as on month end	464	₹ 14,39,50,280	462	₹ 13,75,76,987
Current Payment	24	₹ 31,26,405	20	₹ 41,85,738
Post Dated Cheque Received	0	₹ 0	3	₹ 1,25,478
Amount Collected in the Month	24	₹ 31,26,405	23	₹ 43,11,216
Discount Amount Written-Off by Member in the month	9	₹ 16,01,455	14	₹ 10,24,584
Amount to be Reduced in the Month		₹ 47,27,860		₹ 53,35,800
Complaints in Caution List	1558	₹ 32,66,86,689	1577	₹ 33,13,31,793

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## MEETINGS

The Office Bearers of the Association met on several occasions and discussed and decided few key points in the organisational matters including Organising of 82<sup>nd</sup> National Garment Fair, CMAI's FAB Show ,CMAI's Corporate Fair, Releasing CMAI's Apparel Consumption Study Report 2025 on the Apparel Industry, Progress made on the Working of Apparel Training Institute at Asmeeta Texpa, Bhiwandi , New Office Premise at 803- A- Wing, Naman Midtown etc.

A Meeting of the Members of the Conciliation & Arbitration Sub-Committee was held on Wednesday 26th November~ 2025 at 4:00 PM in the Office of the Association to discuss current Status of various Complaints received from Members and the Brain storming Session by the Sub Committee Members on how to take this forward to make the Conciliation and Arbitration Department more Efficient in resolving the Complaints

## CMAI AT TEXCON



Confederation of Indian Industry (CII) organised the 17<sup>th</sup> edition of its Annual Textiles and Apparel Conference – **TEXCON'25 with the theme “Building a Future-Ready Textile Ecosystem: India’s Competitiveness Agenda”** on **02 December 2025** in New Delhi.

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Smt. Neelam Shami Rao, Secretary ( Textiles ) , Mr Rohit Kansal, Add Secretary Ministry of Textiles Mr. Kulin Lalbhai of Arvind Group, Mr. Rahul Jain of BCG, and Mr. Rahul Mehta, Chief Mentor were the Inaugural Speakers at the CII's TEXCON '25 held at Delhi on 3rd December 2025. The Conference saw outstanding speakers and leaders of the Textile Industry gather to discuss, debate, and deliberate over the future of India's Textile Industry and the way forward.

### CMAI ACHIEVES A MAJOR MILESTONE



On 17th December 2025, a CMAI delegation comprising Mr. Naveen Sainani - Hon. General Secretary; Mr. Anand Golecha - Chairman, Apparel Training Centre Sub Committee and Mr. Rahul Mehta - Chief Mentor, met Shri Sanjay Savkare, Hon'ble Minister of Textiles, Government of Maharashtra and invited him to be the Chief Guest for the inauguration of the Apparel Training Centre at Asmeeta Textile Park .

The Hon'ble Minister has graciously accepted the invitation and will Inaugurate the Apparel Training Centre on 19th January 2026 , marking a significant milestone in CMAI's commitment to Strengthening Skill Development in the Apparel Industry.

### EVENTS

#### 82ND NATIONAL GARMENT FAIR

The Association is gearing up for Organizing the 82nd National Garment Fair from 20th to 22nd January 2026 at Bombay Exhibition Centre, Nesco Complex, Goregaon East, Mumbai 400063. The draw of lots for Allotment of Stalls was held in December 2025 and the same was Uploaded in the Website of the Association to enable the Exhibitors to peruse the same.

In the Men's Wear, 240 Exhibitors ( 265 Stalls ) will be Presenting approx. 323 Brands , in the Women's Wear 321 Exhibitors ( 358 Stalls) will be Presenting approx. 359 Brands , in the Kids Wear 399 Exhibitors ( 409 Stalls) will be presenting approx. 515 Brands ( Total 986 Exhibitors showcasing 1225 Brands ) Covering a Gross Area of Approx. 7,00,000 Sq Ft Area to over 30,000 Retailers who are expected to Visit this 3 Day Fair.



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## 74th INDIA INTERNATIONAL GARMENT FAIR



The 74th India International Garment Fair (IIGF) Autumn / Winter 2026-27 will be held from 23rd – 25th January 2026 at Yashobhoomi, Dwarka, New Delhi. The IIGF is held under the aegis of International Garment Fair Association (IGFA), jointly organized by The Clothing Manufacturers Association of India (CMAI), Garment Exporters & Manufacturers Association (GEMA) & Garment Exporters Association of Rajasthan (GEAR) from 23rd to 25th January 2026 .

The Association has so far forwarded 33 Applications admeasuring a Gross Area of 666 SQM to IIGF.

## 6<sup>TH</sup> EDITION OF CMAI FAB SHOW



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The 6th Edition of CMAI FAB Show will be held from 02nd to 04th April 2026, at Bombay Exhibition Centre, Mumbai.

The FAB show will showcase India's comprehensive capabilities across the textile value chain. From cutting edge fabrics to sustainable solutions, the show reflects how our industry is gearing up to not just meet, but lead the next wave of global apparel sourcing.

The Association also Conducted Road Shows in various Cities viz; Surat, Tirupur and Ludhiana.

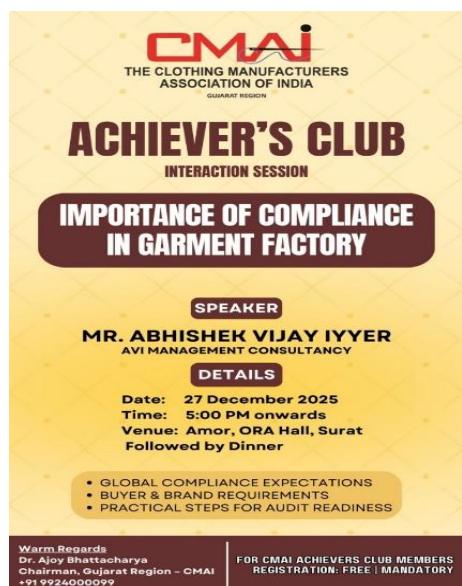
### INAUGURAL EDITION OF CMAI CORPORATE FAIR - TENDHAUS

**CMAI To Host Inaugural TRENDHAUS 2026 – Autumn Winter Collections from 26<sup>th</sup> to 30<sup>th</sup> January 2026 at Bombay Exhibition Centre, Goregaon ( East) Mumbai**

India Brands Collective, An Exclusive Show , Entry By-Invitation - Booking Fair Featuring India's 11 Leading Fashion Brands.



### ACHIEVERS CLUB – GUJARAT CHAPTER



The Association Organised its " Achievers Club " an Interactive Session in Surat on 27<sup>th</sup> December 2025. The Topic for the Session was : Importance of Compliance in Garment Factory : by an Eminent Speaker by Mr Abhishek Vijay Iyyer , AVI Management Consultant.

The Session was attended by Gujarat based Members and the Session was very informative.

Mr Naveen Sainani, Hon Gen Secretary and Mr Rahul Mehta, Chief Mentor attended the same on behalf of the Association,

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## CMAI IS IN THE MEDIA

### Press Release-1

#### CMAI's 6th Edition of FAB Show 2026 Generates Strong Interest Across the Textile Value Chain with 78% Exhibition Space Booked within 21 days of Launch; Underscores Strong Industry Confidence

- Show will be held in Mumbai from April 2–4, 2026
- Feature 300+ exhibitors spanning 2 lakh sq. ft. exhibition space
- 14,000+ Trade Buyers from across India expected to attend

**Mumbai, December XX, 2025:** The Clothing Manufacturers Association of India (CMAI) is gearing up to host the much-anticipated 6th edition of the Fabrics, Accessories & Beyond Show 2026 (FAB Show 2026)—India's largest Fabrics & Accessories Sourcing Show from **April 2 to 4, 2026**, at the Bombay Exhibition Centre, Mumbai. The annual B2B event has rapidly evolved into a leading platform showcasing the complete supply chain for India's growing garment industry.

FAB Show continues to serve as a key platform for the garment manufacturing ecosystem, bringing together stakeholders to connect, network, and explore innovations across the textile value chain. Attracting garment manufacturers, brands, exporters, private labels, retailers, distributors, corporates, and e-commerce players, the upcoming edition has already seen over **78% of exhibition space booked within three weeks of launch**.

The 2026 edition is expected to attract around **more than 14,000** trade buyers from over **320** cities across India, including **2,000** platinum dealers, along with overseas buyers from **27 countries**, like Bangladesh, US, Egypt, UAE, Kuwait, Bahrain, China, Russia, Turkey, Rwanda, Kenya, Sri Lanka, Nepal and others. Major attendees will be sourcing heads of leading exporters, brands, retail majors, decision-makers from key manufacturing and export hubs from **Surat, Ahmedabad, Noida, Jaipur, Tiruppur, Ludhiana, Kolkata and Bengaluru** underscoring the show's growing significance. The event will also feature curated **Business Networking Session** enabling focused one-on-one interactions.

Speaking about the upcoming edition, **Santosh Katariya, President, CMAI**, said, “*FAB Show has evolved into a high-impact sourcing and partnership platform for the garment industry at a time when supply chains are increasingly complex and cost-sensitive. For manufacturers, it is a powerful opportunity to showcase capabilities to serious trade buyers, open new accounts, and build long-term relationships for credible supplies aligned for the future. By enabling direct discovery, faster decision-making, and real business conversations on quality, compliance, pricing, and delivery, the show helps participants to strengthen their order pipeline and grow sustainably.*”

Sustainability and Artificial Intelligence (AI) will be a key focus at **FAB Show 2026**. A first-of-its kind day-long **SU.RE Sustainability Conclave** alongside the show is also being planned on **3rd April** covering panel discussions, brand presentations, industry solutions and fashion show in presence of expected **250 professionals** from prominent brands, manufacturers, and exporters. A **dedicated Sustainability & AI Pavilion** featuring 30-35 companies showcasing eco-conscious innovations and display of practical application of AI tools, sustainable textiles, accessories, certifications, and production processes will also be a special highlight offering the industry first-hand access to advanced, sustainable and technology-driven solutions.

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Commenting on the show, **Naveen Sainani, Chairman – FAB Show, CMAI**, said, “FAB Show 2026 has received an overwhelming response with 78% of exhibition space booked in the first three weeks from launch. This edition will also see higher global participation than previous editions, further strengthening the show’s international relevance. With Sustainability and Artificial Intelligence as the central themes, the show reflects the evolving priorities of the garment industry by bringing together AI-driven solutions, eco-conscious innovations, and key stakeholders to enable smarter and more responsible sourcing and manufacturing.”

Conceptualised and launched by The Clothing Manufacturers Association of India (CMAI), the FAB Show was created with a clear vision to support garment industry members by addressing their sourcing needs under one roof. Over the years, the show has grown into a premier sourcing destination, bringing together fabric manufacturers, accessory suppliers, and garment brands from across the country. Each edition has raised the bar in scale, innovation, and networking, with the 6th edition promising to be the most dynamic yet.

<https://www.textilepost.in/2025/12/CMAI-FAB-Show-2026-Ge.html>

<https://textilesouthasia.com/2025/12/23/cmais-fab-show-2026-draws-robust/>

<https://afternoonnews.in/article/cmai-expo-to-be-held-from-april-2-4-in-mumbai/>

<https://fashionvaluechain.com/cmai-fab-show-2026-6th-edition-sees-78-space-booked/>

<https://textilevaluechain.in/news-insights/textile-industry/cmais-fab-show-2026-sees-rapid-uptake-signalling-strong-industry-momentum>

<https://www.retail4growth.com/news/lite/cmais-fab-show-2026-to-feature-300-exhibitors-across-2-lakh-sq-ft-space-7653>

<https://fashionvaluechain.com/cmai-fab-show-2026-6th-edition-sees-78-space-booked/>

<https://textilevaluechain.in/news-insights/textile-industry/cmais-fab-show-2026-sees-rapid-uptake-signalling-strong-industry-momentum>

[https://infashionbusiness.com/home/news\\_details/700https://textilesouthasia.com/2025/12/23/cmais-fab-show-2026-draws-robust/8/](https://infashionbusiness.com/home/news_details/700https://textilesouthasia.com/2025/12/23/cmais-fab-show-2026-draws-robust/8/)

<https://textilesouthasia.com/2025/12/23/cmais-fab-show-2026-draws-robust/>

<https://youtu.be/Ntj9Y1YiokM>

<https://indiantextilejournal.com/cmai-fab-show-2026-sees-78-space-booked-focus-on-sustainability-and-ai/>

## Press Release 2

### CMAI unveils exclusive fashion booking fair TRENDHAUS 2026

The Clothing Manufacturers Association of India (CMAI) has announced the debut edition of CMAI TRENDHAUS 2026 – India Brands Collective, an exclusive corporate booking fair that will bring together 11 prominent Indian fashion brands in a single curated space. Scheduled from January 26 to 30, 2026, the by-invitation-only event will be held at the Bombay Exhibition Centre in Mumbai.

Created as a focused platform for Autumn–Winter 2026 bookings, TRENDHAUS 2026 is designed to offer retailers a structured environment to preview collections, engage directly with brands and place advance orders. The closed-door format aims to provide brands and buyers the time and privacy needed for detailed discussions, product walkthroughs and strategic planning.

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Santosh Katariya, President, CMAI, said, "TRENDHAUS is conceptualized to facilitate the seasonal booking efficiency for retailers by presenting them a seamless, curated environment to preview the new collections from select brands under one roof. This first-of-its-kind initiative also helps to save time, strengthen brand relationships, brand visibility, and streamline pre-season planning for both brands and retailers. CMAI will ensure that attendees enjoy never-seen-before, customized and exclusive services, complemented by the finest hospitality for a unique, productive and enriching experience".

Across the five-day fair, participating brands will hold one-to-one meetings with retail decision-makers from across the country. CMAI expects around 2,000 pre-identified retailers to attend, including representatives from multi-brand outlets, exclusive brand outlets, large format stores, e-commerce platforms and franchisees. Networking dinners and curated interactions will further support business development and relationship building.

The exhibiting brands include Classic Polo, Easies, Gini & Jony, Indian Terrain, Integriti, Jr Killer, Killer, Nostrum, Spykar, Status Quo and Twills. Each label will showcase its range in tailored spaces spanning 4,000 sq. ft. to 30,000 sq. ft., offering buyers an immersive preview experience.

TRENDHAUS 2026 underscores CMAI's continued effort to Strengthen Collaboration, Professionalism and Growth within India's Apparel Sector.

<https://www.retail4growth.com/news/cmai-to-host-inaugural-trendhaus-2026-featuring-indias-leading-fashion-brands-7641>

<https://www.tripurastarnews.com/cmai-to-host-inaugural-trendhaus-2026-india-brands-collective-an-exclusive-by-invitation-booking-fair-featuring-indias-11-leading-fashion-brands/>

<https://indiantextilejournal.com/cmai-unveils-exclusive-fashion-booking-fair-trendhaus-2026/>

<http://www.textilepost.in/2025/12/CMAI-Host-Inaugural-TREND.html>

[https://infashionbusiness.com/home/news\\_details/6967](https://infashionbusiness.com/home/news_details/6967)

<https://textilesouthasia.com/2025/12/15/cmai-host-inaugural-trendhaus-2026/>

<https://fashionvaluechain.com/cmai-launches-trendhaus-2026-india-brands-collective/>

<https://www.moneycontrol.com/news/business/weaker-rupee-offers-some-respite-to-tariff-hit-textile-exporters-13708278.html/amp>

<https://www.tradingview.com/news/moneycontrol:3c452dbda094b:0-weaker-rupee-offers-some-respite-to-tariff-hit-textile-exporters/>

<https://www.apparelviews.com/weaker-rupee-offers-some-respite-to-textile-exporters>

<https://knittingviews.com/weaker-rupee-offers-some-respite-to-textile-exporters/>

[https://infashionbusiness.com/home/news\\_details/7008/8](https://infashionbusiness.com/home/news_details/7008/8)

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## CMAI to Host TRENDHAUS – India Brands Collective, a Booking Fair Featuring 11 Leading Fashion Brands

By Our Staff Reporter

MUMBAI, DEC. 16—

The Clothing Manufacturers Association of India (CMAI) proudly announces the launch of the first edition of CMAI TRENDHAUS 2026 – India Brands Collective, a dedicated booking fair that will bring together 11 of India's leading fashion brands under one roof. The exclusive, by-invitation-only fair will take place from 26th to 30th January 2026 at the Bombay Exhibition Centre, Mumbai. TRENDHAUS 2026 has been designed as a focused corporate booking fair where retailers can preview Autumn-Winter 2026 collections, interact directly with brands, and place advance orders in a structured and professional setting. By hosting the fair in a closed-door format, CMAI aims to ensure a productive atmosphere for both brands and buyers, with ample time for detailed preview and discussions.

Speaking on the launch, Santosh Kataria, President, CMAI, said, "TRENDHAUS is conceptualized to facilitate the seasonal booking efficiency for retailers by presenting them a seamless, curated environment to preview the new collections from select brands under one roof. This first-of-its-kind initiative also helps to save time, strengthen brand relationships, brand visibility, and streamline pre-season planning for both brands and retailers. CMAI will ensure that attendees enjoy never-seen-before, customized and exclusive services, complemented by the finest hospitality for a unique, productive and enriching experience".

Over five days, the fair will enable one-to-one business meetings between participating brands and retail decision-makers from across India. CMAI expects around 2000 pre-identified retailers to attend, including MBOs, EBOs, Large Format Stores, E-Commerce and Franchisees. In addition to the pre-scheduled meetings, the fair will feature networking dinners to forge meaningful engagements, business interaction and relationship-building among participants.

Brands exhibiting at the inaugural edition include Classic Polo, Eesies, Gini & Jony, Indian Terrain, Integriti, Jr Killer, Killer, Nostrum, Spykar, Status Quo and Twills.

With TRENDHAUS 2026, CMAI reinforces its commitment to creating meaningful platforms that advance the growth, collaboration, and professionalization of the Indian apparel industry.

### तीसरा उत्तर भारत परिधान मेला 2800 से अधिक खरीदारों के साथ सफलतापूर्वक सम्पन्न



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# Textiles to safety: Rejig in standards for export fillip

BIS released 30 new and revised quality norms, voluntary for compliance

Dhirendra Kumar

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**NEW DELHI:** India is stepping up efforts to align its products with global quality benchmarks, with the Bureau of Indian Standards (BIS) notifying a fresh set of new and revised norms for textiles, aerospace materials, smart mobility, mining safety and agro-textiles.

The move is aimed at modernising legacy norms, covering emerging technologies, and improving global competitiveness of Indian products, even while giving industry a transition window to adapt. In total, around 30 new standards, which are voluntary for compliance, were released by the government on December 27.

A major focus is on textiles, with the BIS revising standards for cotton fibres, handloom cotton shirting, drill fabric, and khadi products, replacing norms that in some cases dated back more than four decades. The latest specifications are expected to improve consistency in quality



The move aims to modernise norms, cover new tech and boost global competitiveness, while giving industry time to adapt. HT

assessment, support exporters facing tight overseas scrutiny and boost consumer confidence, besides removing ambiguity for manufacturers.

The latest update to standards assumes significance as the government has withdrawn 25 quality control orders (QCOs) between mid-November and early December, even as it launched over 15 new standards in the same period. The number of new standards notified is now close to 50.

The standards create a pipeline for future regulation as they

can be later converted into mandatory QCOs.

Experts say the latest standards are designed to be flexible. They prepare exporters to be competitive with quality matching global norms. "Global buyers increasingly expect uniform quality and safety benchmarks and countries that fail to meet them risk losing market access," said Rahul Mehta, chief mentor of the Clothing Manufacturers Association of India.

Yet, since these standards are voluntary, manufacturers are not compelled to comply imme-

dately. They can upgrade processes and improve quality over time. "The approach allows Indian manufacturers to prepare for global competition at their own pace, helping them align with international standards without immediate regulatory pressure," said Mehta.

There still are some concerns around how these standards will be implemented on the ground and how easy compliance will be for exporters.

"In my view, this move is meant for quality standardisation to safeguard and sustain the image of Indian products," said Raja M. Shanmugam, former president of the Tirupur Exporters' Association. "The only caution is that bureaucratic misuse during implementation must be closely monitored."

Safety-critical sectors have also seen tighter norms, with revised standards for fire-resistant conveyor belts used in underground mines and hazardous environments, reflecting global expectations on occupational safety.

In aerospace-linked applications, updated standards for woven glass fibre fabrics aim to strengthen capability in high-performance materials and improve integration with global supply chains.



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## Diversifying Exports

With nearly 40 per cent of India's textile exports headed to the US, market volatility there poses serious risks. Slowing demand and shifting trade dynamics make over-reliance unsustainable. It's time India broadens its export horizon—tapping emerging markets to build resilience and ensure long-term growth.

**T**he US decision to impose 50 per cent tariffs on Indian textile and apparel imports in August 2025 has become a watershed moment for the industry, exposing its long-standing dependence on a single dominant market. With nearly a third of India's textile exports tied to the US, the sudden escalation has triggered widespread disruption—order

cancellations, shrinking margins, and fears of losing buyers permanently. Yet, amid the turbulence, the crisis has also pushed the sector to confront a long-delayed priority: diversifying into new geographies. As industry leaders assess both risks and opportunities, a strategic shift toward alternative global markets has now become unavoidable.

### Emerging and alternative export markets

The 50 per cent tariffs imposed by the United States in August 2025 have sent shockwaves through India's textile and garment manufacturing sector. As the world's largest market for textiles and apparel, the US accounts for nearly 28 per cent of India's textile and apparel exports, making it by far the country's biggest export destination in this segment. The immediate impact has been devastating—order cancellations, margin pressures, price disadvantages, and the looming threat of permanently losing customers have forced the industry to confront an uncomfortable reality.

**Dr Gurudas Aran, Independent Director**, frames the magnitude of the crisis and the strategic pivot now underway. "The impact has been quite severe in terms of cancellations of orders, increased margin pressures, price disadvantages, and even the risk of permanently losing a

customer. Hence, there has been a need to look beyond the US market, and in response to these tariffs, India is now targeting about 40 new markets, including some EU countries, the UK, Japan, South Korea, and several others."

These 40 countries collectively represent a \$590 billion market opportunity, where India's current share stands at a mere 4-5 per cent. The potential is staggering, particularly in markets like Japan, where India holds just a 1 per cent share compared to China's commanding 54 per cent. This disparity underscores both the challenge and the opportunity that lie ahead for Indian exporters willing to invest in understanding new markets, developing quality products, and exercising patience.

**Rahul Mehta, Chief Mentor, Clothing Manufacturers Association of India (CMAI)**, offers a sobering assessment of the industry's reactive tendencies: "The fact that Indian exporters need to diversify their market basket is a no-brainer. They have to do that. Unfortunately, like many events in the past with Indian exporters, we are only reacting to a given impetus or a given situation. This strategy of diversification should have happened, and should have taken place, many years ago. But our tendency is to be satisfied and complacent with what we have on hand. And obviously, the American market was the most attractive option available."

Mehta raises a critical question that exporters now face: whether to diversify into other export markets or pivot toward tapping India's growing domestic market. This strategic choice will define the sector's trajectory in the years to come.

The tariff crisis, despite its severity, has catalysed some positive developments that had long been stuck in bureaucratic delays. **Prashant Agarwal, Joint Managing Director, Wasir Advisors**, highlights how external pressure has accelerated key trade negotiations: "Some of the positives of what the tariffs have done are that the UK FTA, which was taking so much time, got signed and now has to be ratified. The EU FTA, which we were thinking would take 2-3 years, will get signed by this year and then will get ratified fast."

Beyond these European markets, Agarwal points to some further substantial and largely untapped opportunities. Japan represents a \$25 billion textiles and apparel market, while Canada accounts for \$12 billion, Australia \$10 billion, and Russia \$8 billion. However, penetrating these markets requires more than simply entering them. Each has distinct cultural preferences and product requirements that Indian manufacturers must understand and adapt to. Russia, for instance, is open to Indian exporters but demands workwear and winter wear—products that India's current manufacturing base is not yet equipped to produce at scale.

The lesson is clear: diversification is not just about finding new buyers for existing products; it requires

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“There has been a need to look beyond the US market, and in response to these tariffs, India is now targeting about 40 new markets, including some EU countries, the UK, Japan, South Korea, and several others.”

Dr Gurudas Aras, Independent Director

genuine market research, product development, and long-term commitment.

Not all Indian exporters are equally vulnerable to the US tariff shock. **Birendra Nath Bandyopadhyay, Executive Director, Orbit Exports**, represents a segment of the industry that has already achieved both geographic and product diversification: “One thing about Orbit Exports is that we are a small company, but our product mix and market mix are quite well balanced, and we are not very US-dependent. Yes, in one product category there is some US dependence, but we have a presence in Europe and in the domestic market as well.”

Orbit Exports has carved out a niche in high-value, non-commodity textiles—jacquards, high-end ladies’ bottoms, and synthetic-based specialty products. By focusing on value rather than volume, and by serving markets in Europe, the Middle East, and domestically, the company has embedded resilience into its business model. Bandyopadhyay’s company is doubling its capacity this year, confident that the US tariff impact “cannot extend more than six months, because of the US’s own benefit already.” This optimism—rooted in product differentiation and market diversification—offers a meaningful template for other exporters navigating the current disruption.

**Sanjay K. Jain, Managing Director, TT Limited**, brings a frontline exporter’s perspective to the discussion, and his assessment is considerably more sobering: “This temporary closure of the USA—hopefully temporary—has rung a strong bell across the industry. Many people feel that only those exporting to the US are going to be impacted, but it doesn’t really happen that way. A US buyer who was sourcing from one exporter will probably shift to someone like Arvind. So Arvind will cut down another vendor who is slightly lower in the chain, and eventually the whole industry gets impacted—especially when \$10 billion moves out of the system.”

Jain emphasises that the ripple effects touch everyone in the ecosystem. Even if tariffs are eventually reduced, rebuilding momentum will take time. Around 50 per cent of exporters have maintained dialogue with US buyers in the hope of resuming shipments once tariffs ease.

However, Jain challenges the narrative that US tariffs alone created this crisis, pointing instead to a long-term decline the industry has failed to confront. Post-COVID, India achieved \$20 billion in apparel exports, but that figure dropped to \$15–15.5 billion and has stagnated. Over the past decade, India’s garment exports in dollar terms have actually fallen, while China—despite losing market share—has increased its absolute export value, and countries like Vietnam and Bangladesh have surged ahead.

India already has free trade agreements with Japan, Korea, and Australia (the latter more than two years old), yet has failed to make meaningful inroads. Jain’s diagnosis is blunt: “We should be going to new markets. I think so. Everyone knows the billion dollars of each market. China is practically there across the world. Any market we talk of, whether it’s Latin America, Africa, Australia, China is everywhere. India should be doing it, but while it is not... Friends, it’s not just US, which is going to force us.”



“This strategy of diversification should have happened, and should have taken place, many years ago. But our tendency is to be satisfied and complacent with what we have on hand.”

Rahul Mehta, Chief Mentor, CMAI

The fundamental challenge, Jain argues, is that there is no global shortage of garment manufacturing capacity. In a well-supplied market, buyers need compelling reasons to switch suppliers—better prices, superior quality or strong references. He advocates government intervention through focused incentives for priority markets, noting that exporters cannot absorb cost disadvantages on their own: “Price with the same quality is something that will attract people. I don’t think we can offer better quality than what they are already buying, more or less, and giving better prices on our own is also not easy. So that’s something the government should think about. There needs to be something more than just talk.”

At the heart of India’s competitiveness problem lies a raw material disadvantage, particularly in man-made fibres (MMF). Global demand has shifted dramatically—30 per cent cotton and 70 per cent MMF—driven by the reality that cotton production will not grow significantly. While India’s domestic market has embraced MMF textiles, with manufacturers in Surat supplying rapidly, Indian exporters remain hamstrung by

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India's T&A Exports (in \$ million) in FY26

Items	Oct-24	Oct-25	Growth (%)	Apr-Oct 2024	Apr-Oct 2025	Growth (%)
Textiles (T)	1833.96	1596.99	-12.92%	11994.33	11569.39	-3.54%
Apparel (A)	1227.58	1069.42	-12.88%	8733.72	8832.56	1.13%
T&A	3061.54	2666.41	-11.82%	20728.05	20401.95	-1.57%

Source: PIB

quality control orders (QCOs), inadequate domestic manufacturing quality, and raw material costs that undermine export viability. "Some of us have the capacities to meet the quality, but without good raw material, we can't. Textile margins are all single digit, so don't expect anything from it," Jain concludes.

The path forward requires more than aspirational targets and trade missions. It demands fundamental reforms in raw material competitiveness, sustained engagement with new markets to understand their specific requirements, product innovation aligned with global demand shifts toward synthetic textiles, and potentially government incentives to offset initial cost disadvantages in priority markets. The US tariff shock has created urgency, but whether it catalyses genuine transformation or merely temporary adjustment remains the defining question for India's textile sector.

### Value addition and product diversification

India's textile and apparel export sector stands at a critical juncture, where traditional approaches to manufacturing and market positioning are proving insufficient. The path forward, according to industry leaders, demands a fundamental shift in mindset—from producing what is convenient to manufacturing what global markets actually need.

Prashant Agarwal, addressing the core challenge of product diversification, argues that India's perceived limitations are more mental than material. "Product diversification is difficult. Somehow, I don't agree with that," he asserts, challenging the industry's conventional wisdom. While acknowledging India's competitive disadvantage in polyester compared to China—which dominates with 70 per cent of its exports in synthetic segments—Agarwal points to successful models in Vietnam and Bangladesh that began with garment manufacturing and gradually achieved backward integration. Vietnam, for instance, evolved from a 5 per cent textiles and 95 per cent garments mix to 30 per cent textiles and 70 per cent garments, demonstrating that strategic focus can reshape industrial capabilities.

The transformation Agarwal advocates requires abandoning what he calls the "contractor mentality" in favour of an "industrialist mentality." "We need to look at things slightly differently. We have to move from a contractor mentality to an industrialist mentality, where we say, okay, I have to make this product, I have to target

this market, and for this product, these are my inputs, this is the capability level, this is the training level, this is the type of technology we need to produce," he explains. This approach has already yielded results in Tiruppur, where four to five major factories are establishing world-class synthetic knit facilities with capacities of 20–25 tonnes, working with major players like Reliance and Sanathan.

The home textile sector provides compelling evidence of what targeted excellence can achieve. Indian manufacturers such as Trident, Welspun, Himatsingka, and IndoCotton have captured 55–60 per cent of the US market in towels and bedsheets, 20 per cent in Europe, and 19 per cent in Australia. This dominance stems from focused expertise in specific product categories. "Because we are capable in a certain product line," Agarwal notes, markets naturally expand. The lesson is clear: depth of capability in chosen segments matters more than the breadth of offerings.



**“This temporary closure of USA, hopefully temporary, has rung a strong bell across the industry. Many people feel those only exporting to US are going to be impacted, but it doesn't really happen that way.”**

Sanjay K. Jain, Managing Director, TT Limited

However, a critical chicken-and-egg problem hampers progress. Raw material suppliers hesitate to invest in export-quality inputs when the market appears too small, while manufacturers struggle to scale without reliable domestic supply chains. Agarwal's solution is straightforward: "You start importing those materials, you have enough market, people will start. There are many players who are capable." The key is creating initial demand through imports, which will eventually compel domestic suppliers to match quality and price.

Mehta brings the sustainability and compliance dimension into sharp focus, particularly for the MSME sector that comprises 80–85 per cent of India's textile industry. Leading the Clothing Manufacturers Association

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**“**Some of the positives of what the tariffs have done are that the UK FTA, which was taking so much time, got signed and now has to be ratified.”

**Prashant Agarwal, Joint Managing Director, Wazir Advisors**

of India (CMAI), Mehta confronts a unique challenge: most domestic manufacturers face minimal buyer pressure for sustainability, making it difficult to justify investments that will only become mandatory later.

Jain provides ground-level insights into the fabric quality challenge that undermines India's competitiveness. While Surat can produce filament fabric at prices competitive with China, the quality gap remains substantial. Normal-grade fabric requires intensive inspection to eliminate shade variations and knitting defects, and truly flawless fabric costs twice the domestic price—immediately eroding competitiveness. “That quality of fabric is very difficult to pass. I need to really inspect every inch of the roll and take out material where you have shade variations, knitting lines, etc.,” Jain notes. Export-grade fabric ultimately costs double what domestic buyers pay, making price competition impossible.

Jain identifies innerwear manufacturing as a promising category where India has domestic expertise but lacks export-grade machinery. The product does not require man-made fibre, relying instead on cotton and modal—areas where India is strong. However, the broader challenge remains: Vietnam and Bangladesh strategically opened duty-free input channels, mastered garment manufacturing, and then achieved backward integration with government support—a playbook India has yet to fully adopt.

The premium pricing trap that undermines many value-addition initiatives draws particular attention. “Value addition means, if you look at premium, again, we'll be uncompetitive. We should just keep our normal margins, do value addition, establish ourselves, and then start asking for maybe 2 per cent, 3 per cent higher,” Jain cautions. The assumption that value-added products will automatically command premium prices has derailed numerous export efforts. The strategy must focus on establishing market presence at competitive rates before gradually improving margins.

Bandyopadhyay, with two decades of experience in technical textiles, highlights the innovation deficit constraining India's higher-value segments. Technical textile demand in India vastly exceeds domestic production—perhaps by factors of 20 to 50—leaving the

market flooded with Chinese imports. “There's huge demand in India, huge, and actually the production is not even 1/20th or 1/50th of that requirement,” he observes. The root cause, he argues, is India's lack of true innovation culture and polymer development capabilities.

The technical textile opportunity remains largely untapped because India focuses on volume-based products like home textiles rather than value-based specialties. “To reduce our carbon footprint, we have to do certain products which will be higher value, low environmental impact, and you'll give a lot of foreign currency you can earn,” Bandyopadhyay argues. Yet essential components—quality jet dyeing machines, polyurethane, membranes, and proper microdenier yarns needed for high-end windcheaters—must all be imported from China or Korea, making competition with those countries nearly impossible.



**“**One thing that Orbit exports. We are a small company, but our product mix and market mix, we have a quite a good balance, and we are not very much US-dependent.”

**Birendra Nath Bandyopadhyay, Executive Director, Orbit Exports**

The machinery gap compounds the challenge. Even basic equipment like quality jet dyeing machines is not available domestically, forcing manufacturers to import from the very countries they aim to compete against. This dependency extends to specialised yarns and technical components, creating a structural disadvantage that innovation alone cannot overcome without substantial investment in infrastructure.

### Building stronger foundations for export growth

As Indian textile manufacturers chart their course toward emerging markets, the conversation inevitably turns to the infrastructure that will support this expansion—supply chain resilience, technological adoption, and the delicate balance between scale and flexibility. Industry leaders agree that while India has historically dominated cotton-based manufacturing, the landscape is evolving rapidly, particularly in man-made fibre production.

Dr. Gurudas Aras opened the discussion with measured optimism about India's MMF trajectory, acknowledging that while certain machines and fibres remain unavailable domestically, the sector is taking deliberate steps forward. He expressed confidence that within three to five years, India will significantly increase

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its share in MMF exports, signalling diversification beyond the country's traditional cotton stronghold.

**Technology as a service differentiator:** Agarwal, bringing his operational expertise to the fore, reframed the technology conversation in compelling terms. The real competitive advantage, he argued, lies not in machinery acquisition but in service delivery. His observations from recent factory visits, including interactions with major players like Trident, revealed a fundamental truth about modern manufacturing competitiveness.

"It's not the difference in terms of machines that matters. Everybody can buy machines, but how you provide the service becomes more important," Agarwal emphasized. "Service comes through, whether it is AI or distillation—that makes the whole difference between one company and another."

He illustrated this with concrete examples from the production floor. Digital printing technology has revolutionized product development cycles, replacing the limitations of rotary printing with unprecedented design finesse. Tools enabling AI-driven design, rapid sampling, and customized product development now allow manufacturers to meet fast fashion demands with agility. But the critical gap, Agarwal noted, remains in organizational adoption and workforce training. Owners may decide on rapid technology adoption, but implementation falters when employees lack proper training.

"Adoption, training, and then using everything to service the buyer is the key to supply chain resilience," he stated. "I think it's more of a service industry we are talking about. So this is what we have to keep as the

mantra, and I can assure you that will be the differentiation for the future in the next decade."

Aras reinforced this perspective, noting that AI and machine learning tools entering the business will ultimately drive improvements in productivity, efficiency, and quality—the true differentiators of profitability in competitive markets.

**The MSME challenge:** Mehta, representing the Clothing Manufacturers Association of India, brought a contrarian yet pragmatic voice to the scale debate. He challenged the prevailing industry and government assumption that export success requires large-scale operations, pointing to a fundamental mismatch in policy design.

"MSMEs have limited resources; that's why they are MSMEs," Mehta observed. "Exports today require fairly large inputs in terms of investments, plant and machinery, adopting the latest technology, and so on."

He proposed several collaboration models to bridge this gap: the Japanese aggregator system where one large exporter coordinates production across smaller MSMEs; cluster systems that leverage geographic proximity for integrated supply chains; and India's homegrown cooperative society model. Not all experiments will succeed in garments, he acknowledged, but experimentation remains essential.

Aras interjected with a defence of the revised PLI scheme, noting that investment thresholds have been reduced from 1-3 billion to 500-250 million, with productivity thresholds similarly lowered to accommodate middle-scale industries. However, Mehta pressed the point by asking Agarwal directly about practical implications.

Agarwal's response grounded the debate in concrete



The technical textile opportunity remains largely untapped because India focuses on volume-based products (like home textiles) rather than value-based specialties.

Date	Subject	Particulars
<b>Circulars (Email, Website &amp; WhatsApp to All Members)</b>		
4th December 2025	<b>Cir No. 33 / 82nd NGF / 25</b>	Cir No. 33 / 82nd NGF / 25 – 82ND NATIONAL GARMENT FAIR SHOW DIRECTORY CIRCULAR
8th December 2025	<b>Cir No. 34 / B-15 / 2025</b>	Cir No. 34 / B-15 / 25 – Participate under CMAI in Bharat Tex 2026, 14-17 July 2026 at Bharat Mandapam (Pragati Maidan), New Delhi

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10th December 2025	<b>Cir No. 35 / M-3 / 2025</b>	Cir No. 35 / M-3 / 25 – ACTIVITIES OF THE ASSOCIATION FOR THE MONTH OF NOVEMBER 2025
		<b>Social Media Posts (Facebook, Instagram, LinkedIn, Twitter, WhatsApp &amp; YouTube)</b>
3rd December 2025	<b>FAB SHOW</b>	Stall Booking Post
3rd December 2025	<b>NATIONAL GARMENT FAIR</b>	Save the Date Post
3rd December 2025	<b>NATIONAL GARMENT FAIR</b>	Event Creation on Facebook
5th December 2025	<b>CMAI News</b>	*Secretary Smt. Neelam Shami Rao, Kulin Lalbhai of Arvind Group, Rahul Jain of BCG, and CMAI's Chief Mentor Rahul Mehta,* were the Inaugural Speakers at the *CII's TEXCON '25* held at *Delhi on 3rd December*
8th December 2025	<b>FAB SHOW</b>	Stall Booking Post
9th December 2025	<b>NATIONAL GARMENT FAIR</b>	Visitor Registration Now open
11th December 2025	<b>C&amp;A</b>	Addition to Caution List - WhatsApp groups
12th December 2025	<b>CMAI News</b>	Retail Employee Day Post
12th December 2025	<b>NATIONAL GARMENT FAIR</b>	Visitor Registration Now open
15th December 2025	<b>FAB SHOW</b>	Stall Booking Post
16th December 2025	<b>CMAI News</b>	Impact of GST 2.0 Survey
16th December 2025	<b>NATIONAL GARMENT FAIR</b>	Visitor Registration Now open
17th December 2025	<b>C&amp;A</b>	SRI MANJUNATHA GARMENTS - KANAKPURA, KARNATAKA - CAUTION POST IN WHATSAPP GROUPS
17th December 2025	<b>CMAI News</b>	A CMAI delegation comprising Mr. Naveen Sainani, Hon. General Secretary; Mr. Anand Golecha, Chairman – Apparel Training Centre; and Mr. Rahul Mehta, Chief Mentor, met Shri Sanjay Savkare, Hon'ble Minister of Textiles, Government of Maharashtra, and invited him to be the Chief Guest for the inauguration of the Apparel Training Centre at Asmeeta Textile Park .

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24th December 2025	<b>FAB SHOW</b>	FAB Show - AI Video release
25th December 2025	<b>NATIONAL GARMENT FAIR</b>	Exhibitor Promotion Post - 3
26th December 2025	<b>NATIONAL GARMENT FAIR</b>	Exhibitor Promotion Post - 3
29th December 2025	<b>NATIONAL GARMENT FAIR</b>	Exhibitor Promotion Post - 3
30th December 2025	<b>NATIONAL GARMENT FAIR</b>	AI Video Release - Visitor Registration
31st December 2025	<b>NATIONAL GARMENT FAIR</b>	Exhibitor Promotion Post - 3
31st December 2025	<b>CMAI News</b>	New Year Video post

**Weekly Newsletter (Email, WhatsApp & Website)**

1st December 2025	<b>Vol. 14 No. 48</b>	Business News related to Domestic and International Garment Industry for the period prior to 1st December 2025
8th December 2025	<b>Vol. 14 No. 49</b>	Business News related to Domestic and International Garment Industry for the period prior to 8th December 2025
15th December 2025	<b>Vol. 14 No. 50</b>	Business News related to Domestic and International Garment Industry for the period prior to 15th December 2025
22nd December 2025	<b>Vol. 14 No. 51</b>	Business News related to Domestic and International Garment Industry for the period prior to 22nd December 2025
29th December 2025	<b>Vol. 14 No. 52</b>	Business News related to Domestic and International Garment Industry for the period prior to 29th December 2025

**THE CLOTHING MANUFACTURERS ASSOCIATION OF INDIA**

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