महाराष्ट्र शासन

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%

Making India A Zero-Waste Fashion Country

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Shri. Devendra Fadnavis
Hon'ble Chief Minister
Maharashtra

Devendra Fadnavis
Chief Minister
Maharashtra

सत्यमेव जयते

Mantralaya
Mumbai-400 032

Date: 4th February, 2025

MESSAGE

Global investors are increasingly drawn to Maharashtra, captivated by its reputation as India's economic powerhouse, offering a robust foundation for growth and innovation. The State is supported by a well-diversified industrial base, strong agricultural output, and a vibrant services sector. Its world-class infrastructure, ensures seamless connectivity and logistics.

Maharashtra's dynamic and investor-friendly policies further enhance its appeal, with initiatives focused on case of doing business, sustainable development, and promoting innovation across sectors. Combined with a skilled workforce, abundant natural resources, and a commitment to green and inclusive growth, Maharashtra stands out as a premier destination for global investments and partnerships.

Maharashtra's rich history is deeply intertwined with the prominence of its textiles sector. The state is home to a diverse range of traditional textiles, including Paithani Saree, Himroo, Ghongadi, Karvat Kathi, and Khana fabric. The state has played a significant role in India's rise as a textile powerhouse, contributing 10.4% of the country's total textile and apparel production and 10.2% of total employment in this sector.

Our vision for Maharashtra is rooted in achieving holistic growth that uplifts our people while preserving our natural resources for future generations. The Government has adopted a forward-thinking approach to ingrain sustainability at the core of its textiles policy framework.

I congratulate the Department of Textiles, Government of Maharashtra for their commendable efforts in preparing this insightful report. This will play a pivotal role in shaping the sustainability landscape within the textile sector. The insights provided will be crucial in guiding research, innovation, and development towards a more sustainable future, benefiting both industry and academia.

(Devendra Fadnavis)

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Website : www.maharashtra.gov.in

Shri. Eknath Shinde
Hon'ble Deputy Chief Minister
Maharashtra

सत्यमेव जयते

DEPUTY CHIEF MINISTER
MAHARASHTRA STATE

10 FEB 2025

Message

At the outset I extend my best wishes to the ministry of textiles, Government of India and Maharashtra for organizing Bharat Tex 2025

Maharashtra holds a prominent position in India's textile sector contributing significantly to both national production and employment. As one of the leading textile hubs in the country, Maharashtra accounts for a substantial share of the country's total textile output and is home to a vast network of textile mills, powerlooms, and garment manufacturing units.

Sustainability in the textile industry is no longer a matter of choice but an imperative for a future that is responsible and environmentally conscious. The Government of Maharashtra is deeply committed to promoting sustainable practices within the textile sector, acknowledging the challenges posed by waste generation and resource depletion. Through policy interventions, investments in green technologies, and initiatives to enhance circularity, Maharashtra is striving to lead the way in integrating sustainability within the textile industry. The State's focus on cleaner production, waste management, and reducing the carbon footprint aligns with its broader goals of fostering a green economy, creating long-term value for both the environment and the economy.

This report published by the Department of Textiles, Government of Maharashtra and Primus Partners offers key insights into the steps we can take as a State and industry to enable a more sustainable and circular approach to textile production.

I again wish Bharat Tex 2025 a grand success.

(Eknath Sambhaji Shinde)

Shri. Ajit Pawar
Hon'ble Deputy Chief Minister
Maharashtra

DEPUTY CHIEF MINISTER
MAHARASHTRA STATE

Date: 04th February, 2025

MESSAGE

The textile industry in Maharashtra has a rich and illustrious legacy, deeply intertwined with the economic progress of our state. This sector has significantly contributed to shaping Maharashtra's industrial growth right from the traditional Art of handloom weaving to the establishment of large-scale mills. As we chart the future, it is imperative to ensure that the development of this sector aligns with modern environmental and economic priorities, guaranteeing its relevance and progress in the years to come.

Sustainability in the textile industry is essential not only to minimize environmental impact but also to secure the sector's long-term viability. In the face of challenges such as overconsumption of resources and growing textile waste, Maharashtra is committed to adopting the principles of a circular economy in this sector. Through targeted financial investments and comprehensive policy frameworks, the State Government aims to promote sustainable practices, encourage waste reduction, and foster innovation in textile recycling and reuse. Our efforts are focused on transforming Maharashtra's textile industry into a model of sustainability that balances economic growth with environmental stewardship.

This report offers invaluable insights into integrating sustainability and circularity into the textile industry. It provides practical recommendations for stakeholders to adopt greener technologies, enhance waste management practices, and optimize resource utilization. These findings will guide future investments in sustainable textile practices, creating a circular economy that fosters growth while protecting the environment.

As Maharashtra's Textile Department represents the State at the prestigious Expo organized by the Textile Department in New Delhi, I extend my heartfelt congratulations and best wishes. Let us work together to position Maharashtra as a leader in sustainable and innovative textile practices on the global stage.

(Ajit Pawar)

Shri. Uday Samant
Hon'ble Minister Industries
Maharashtra

MINISTER
INDUSTRIES,
MARATHI LANGUAGE
MAHARASHTRA STATE
Mantralaya, Mumbai 400 032
www.maharashtra.gov.in

Date : 06 FEB 2025

MESSAGE

Maharashtra has long been recognized as a hub of industrial growth and innovation, and its textile sector stands as a testament to the State's leadership in this domain. The State accounts for 10.4% of India's total textile and apparel production, making it one of the leading textiles producing states in the country. Maharashtra's textile industry not only supports thousands of jobs across the value chain but also plays a vital role in driving the State's GSDP. With its well-developed infrastructure, skilled workforce, and robust manufacturing capabilities, Maharashtra is undoubtedly one of the most progressive and industrialized states in India, with textiles being a key pillar of its economic growth.

As part of our continued commitment to advancing the textile sector, Maharashtra is proud to host the PM MITRA parks which are set to revolutionize the industry by attracting investments exceeding INR 10,000 crores. This initiative is set to create immense growth opportunities and strengthen Maharashtra's position as a leader in the textile landscape.

At the same time, we recognize the importance of sustainable growth and are actively implementing policies and incentives to ensure that Maharashtra's textile industry thrives responsibly. The State is committed to ensuring that all industrial progress aligns with environmental sustainability and social inclusivity. In this context, I encourage industrialists and entrepreneurs to take insights from this report, embrace ustainable practices, and position Maharashtra at the forefront of a green, future-ready textile industry.

(Uday Samant)

Shri. Sanjay Savkare
Hon'ble Minister Textile
Maharashtra

MINISTER
TEXTILES
MAHARASHTRA STATE
Mantralaya, Mumbai 400 032
www.maharashtra.gov.in

Date : 5 FEB 2025

Message

The textile sector is a cornerstone of India's economy, contributing significantly to employment, exports, and GDP. Maharashtra has always been a leader in this industry, known for its vibrant handloom traditions, advanced textile manufacturing hubs, and iconic products like Paithani sarees, placing the State at the forefront of India's textile heritage and innovation.

The State launched the Integrated and Sustainable Textile Policy 2023-2028, which aligns with the Government of India's visionary 5F approach: Farm to Fiber to Factory to Fashion to Foreign. Since the release of the policy, the State has taken various initiatives to encourage sector-wide collaborations to accelerate a just transition towards a sustainable textile value chain through the 3-R model, namely Reduce, Reuse, and Recycle. We aim to integrate the entire textile value chain and create an enabling environment for the sustained growth of all sub-sectors in the industry.

To promote green and sustainable production, the policy includes several initiatives such as setting up 12 recycling plants with a subsidy @50% or INR 2 crore whichever is less for new projects set up exclusively for recycling of old textile products. The Government is driving transformative change by promoting renewable energy, sustainable manufacturing, and circular economy principles within the sector. Initiatives like supporting technical textile parks, empowering handloom artisans, and encouraging sector-wide collaborations reflect our vision for an inclusive and green textile industry.

While the State is introducing progressive initiatives to transform the textiles sector, it remains equally committed to adopting environment friendly practices and green technologies for sustainable production. This report delves into the environmental impacts of textiles and offers actionable strategies to mitigate them through collaborative and sustainable approaches. I encourage all investors, educators, industry leaders, and stakeholders to utilize the insights presented here as a foundation for driving innovation and practicing sustainable development in Maharashtra's textile industry. Together, we can create a future that harmonizes economic growth with environmental stewardship.

(Sanjay Sushila Vaman Savkare)

Smt. Anshu Sinha, I.A.S
Principal Secretary, Textiles
Co-operation, Marketing and Textiles Department
Government of Maharashtra

GOVERNMENT OF MAHARASHTRA

Anshu Sinha, I.A.S.
Principal Secretary (Textiles)

Co-operation, Marketing and Textiles Department
GOVERNMENT OF MAHARASHTRA,
Mantralaya, Mumbai-400 032.

Date : -

MESSAGE

The textile sector plays a vital role in the economic growth of Maharashtra, contributing significantly to employment generation, industrial development, and exports. As one of the key drivers of the State's industrial landscape, textiles encompass a wide range of activities, from fiber production to garment manufacturing, and represent a sector with immense potential for growth. With technical textiles emerging as the next important segment, the industry is poised to expand into innovative applications such as healthcare, agriculture, infrastructure, and defense, unlocking new opportunities for investment, employment, and sustainable development.

Looking forward to the transformation of the textiles sector, sustainability is an essential component. By ensuring waste reduction, water & energy conservation with the help of sustainable manufacturing, textile industries can minimize its environmental impact. Moreover, ensuring fair labour practices and community development will also strengthen the sector's social responsibility and enhance global competitiveness.

The Integrated and Sustainable Textile Policy 2023-2028 is a key step in this direction. The policy is designed & implemented to be inclusive, addressing the needs and challenges of all segments within the textiles value chain. From farmers engaged in raw material production to small-scale manufacturers and large industrial players, the policy encompasses a holistic approach. In the context of the policy, sustainability extends beyond traditional environmental aspects, such as eco-friendly and resource-efficient manufacturing processes, waste reduction, and pollution control. It also encompasses social and economic sustainability, focusing on ensuring safe and fair working conditions, promoting the welfare of workers, and advancing women's empowerment within the textile sector.

This thought leadership on sustainability and circularity in the textiles sector offers valuable insights for industry stakeholders. It emphasizes the importance of adopting these principles as integral parts of business strategies, investment decisions, and operational practices. As the world moves towards more responsible production and consumption, industry must embrace these changes to remain competitive and meet growing global expectations.

(*Anshu Sinha*)

Mr. Devroop Dhar
Co-Founder & Managing Director
Primus Partners

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Maharashtra's textile industry plays a key role in India's overall textile output with a well-established presence in manufacturing and a strong infrastructure. The state is home to a diverse range of textile businesses, from traditional mills to modern garment production, contributing significantly to employment and economic growth. Maharashtra's industrial framework and skilled workforce make it a crucial player in the national textile landscape.

As the global market increasingly shifts towards sustainability, Maharashtra has a unique opportunity to lead the way in adopting environmentally responsible practices in the textile sector. Sustainable production methods not only help reduce the industry's environmental impact but also create new growth opportunities. By focusing on eco-friendly technologies, waste reduction, and resource efficiency, the state can attract both domestic and international investments that prioritize sustainability. I encourage industry leaders to take insights from this report and embrace sustainable solutions that will shape the future of Maharashtra's textile industry for years to come.

Devroop Dhar
Co-Founder & Managing Director
Primus Partners Pvt. Ltd.

Executive Summary

The textile industry is a key pillar of India's economy, contributing significantly to employment generation, industrial production, and global trade. Accounting for 3.9% of global textile and apparel trade, it contributes 13% to industrial production and 12% to national exports, making India the world's second-largest textile producer

Though the textile industry is a vibrant and employment-generating sector, it also has a darker side, contributing significantly to pollution and environmental degradation. It is one of the largest contributors to environmental pollution and waste. India generates approximately 9.5 million tons of textile waste annually, with 43% of domestic post-consumer waste ending up in landfills. Addressing this challenge requires a comprehensive strategic framework that integrates sustainability, circularity, and resource efficiency across the textile value chain. This document outlines a vision for making India a zero-fashion waste country by 2047, with a focus on policy interventions, industry collaboration, and consumer engagement.

Adoption of circular economy presents a $3.5 billion economic opportunity creating 1 lakh jobs

To ensure that the recommendations in this report reflect the real challenges and needs of the textile industry, a survey was conducted among various textile enterprises and citizens. The findings from these surveys, along with discussions with key industry stakeholders, have been incorporated into the framework. The results highlight the barriers to sustainability, the need for government support, and the role of consumer behaviour in shaping a circular textile economy.

The primary objective of this thought leadership report is to provide actionable recommendations for transforming India's textile industry into a sustainable and circular economy. This includes:

- Reducing textile waste through efficient collection, recycling, and upcycling mechanisms.
- Promoting sustainable raw materials and eco-friendly production practices.
- Encouraging innovation in green technologies and textile waste management.
- Implementing regulatory frameworks that incentivize sustainability.
- Increasing consumer awareness and responsible consumption practices.

The adoption of sustainable and green technologies in the textile sector faces significant challenges across industry, government, and consumers. Financial constraints, such as high initial investment costs for waste management solutions, hinder industry-wide implementation, particularly for MSMEs. Limited adoption of sustainable materials, skill gaps, and resistance to change further slow progress. Additionally, a lack of transparency in waste tracking and fabric composition issues make recycling efforts difficult. On the policy front, inconsistent regulations and a fragmented industry structure create roadblocks, while inadequate consumer awareness and price sensitivity limit demand for sustainable products. The rise of ultra-fast fashion, driven by social media, exacerbates textile waste, making the transition to sustainability even more complex. Addressing these challenges requires a coordinated approach involving financial incentives, policy interventions, industry reforms, and consumer awareness initiatives.

A **Five-Pillar approach** (using the 5F Model) is proposed to **address sustainability across the entire textile value chain** -

FARM - Promote sustainable agricultural practices, organic cotton cultivation, and the use of alternative fibers such as bamboo, hemp, and banana.

FIBER - Encourage recycling and upcycling of textile fibers, ensuring higher adoption of bio-based and non-conventional fibers.

FACTORY - Optimize manufacturing processes to reduce waste, implement circular production systems, and mandate water audits and ZLD systems.

FASHION - Encourage sustainable design principles, circular fashion models, and consumer awareness campaigns to drive behavioural change.

FOREIGN - Align India's textile industry with global sustainability standards, create bilateral trade agreements for sustainable textile exports, and promote India as a global hub for zero-waste fashion.

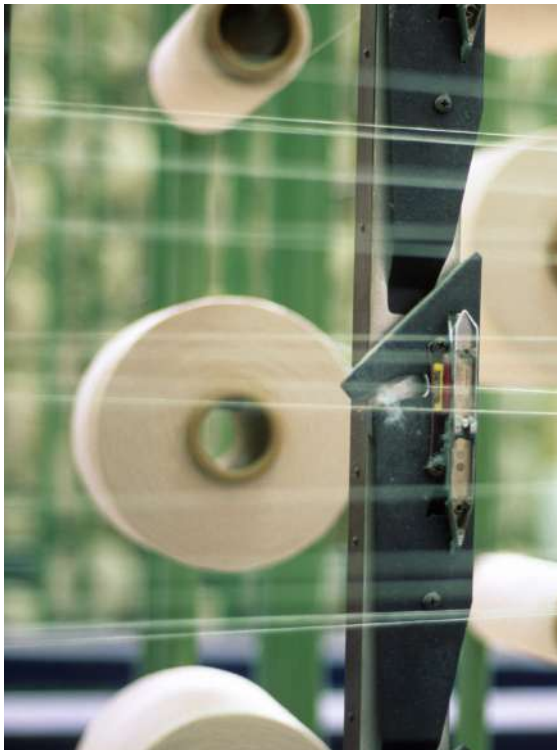
A sustainable future for India's textile industry requires a coordinated approach involving the government, industry stakeholders, consumers, and international partners. The findings from the survey and stakeholder discussions reinforce the urgency for policy interventions, investment in sustainable technologies, and industry-wide collaboration.

With strong policy frameworks, technological advancements, and increased consumer awareness, India can emerge as a global leader in zero-waste fashion. This report provides a comprehensive roadmap to achieve this transformation, ensuring that the textile industry thrives economically while safeguarding environmental resources for future generations.

Ms. Roop Rashi (IA & AS)

Textile Commissioner
Government of India, Ministry of Textiles

"The textile industry is one of the leading sectors driving India's economic growth. Being the second largest employer across the Textile value chain , the sector sustains livelihoods while creating value for the nation. Textile is a resource amenable to circularity within loop of Textile Manufacturing and also by creating products resulting in increasing 'end of life ' for this resource. Hence, textiles should only be considered waste if they reach landfills. Recognising their value as a resource, processes to reintegrate them into the economy need to be strengthened by collective action. By doing so, we can promote a sustainable and circular economy, reducing environmental impact while fostering innovation and growth."



01

Introduction

Textiles Sector is Driving Economic Growth and Employment Worldwide

1 Global Textile Industry acting as a driver of Economic Growth

The global textile industry serves as a fundamental pillar of the world economy, contributing significantly to trade, employment, and economic growth. Valued at USD 1.94 trillion in 2024, the market is projected to expand at a CAGR of over 7% from 2024 to 2030. The fashion industry, a key driver of this growth, continues to evolve as a dynamic force shaping societies, influencing cultural trends, and generating substantial revenue. With its extensive trade networks and diverse production landscape, the textile sector remains integral to global economic development.

13%

Employment to the global workforce

$ 838 Bn

Total Exports (FY 2024)

7.4%

Estimated CAGR of industry

$ 1,940 Bn

Total market size

1.1 Indian Textile industry expanding trade amid rising domestic demand

India's textile industry, one of the oldest and most vital sectors of the economy, has a rich heritage spanning centuries. **Accounting for 3.9% of global textile and apparel trade, it contributes 13% to industrial production and 12% to national exports, making India the world's second-largest textile producer.** The sector recorded a 7% growth in textile and apparel exports (including handicrafts) during the April-October period of FY 2024-25 compared to the same period last year.

The textile sector is poised for further growth, driven by rising consumer demand and the rapid expansion of fast fashion. Increasing disposable incomes, urbanization, and evolving fashion trends are fueling higher consumption of apparel and home textiles. Encompassing a diverse production landscape, from traditional handwoven fabrics to advanced, technology-driven mills, the industry plays a pivotal role in economic development and employment generation across the country.

Source - IBEF

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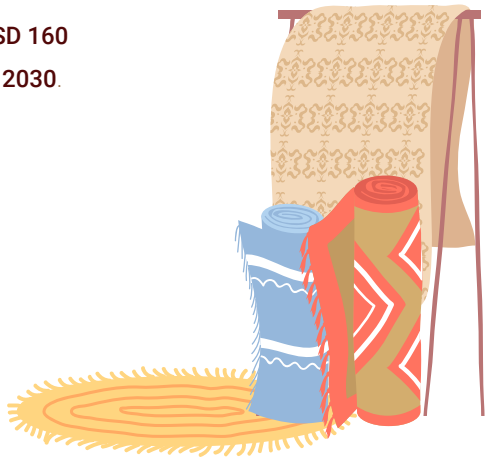
The Indian textile market, currently valued at **USD 160 billion**, is projected to reach **USD 350 billion by 2030**.

Sector accounts for **2.3%** of country's GDP

Provides direct and indirect employment to approximately **145 million** people

Major textile and apparel export destinations for India are USA and EU and with around **47% share** in total textile and apparel exports.

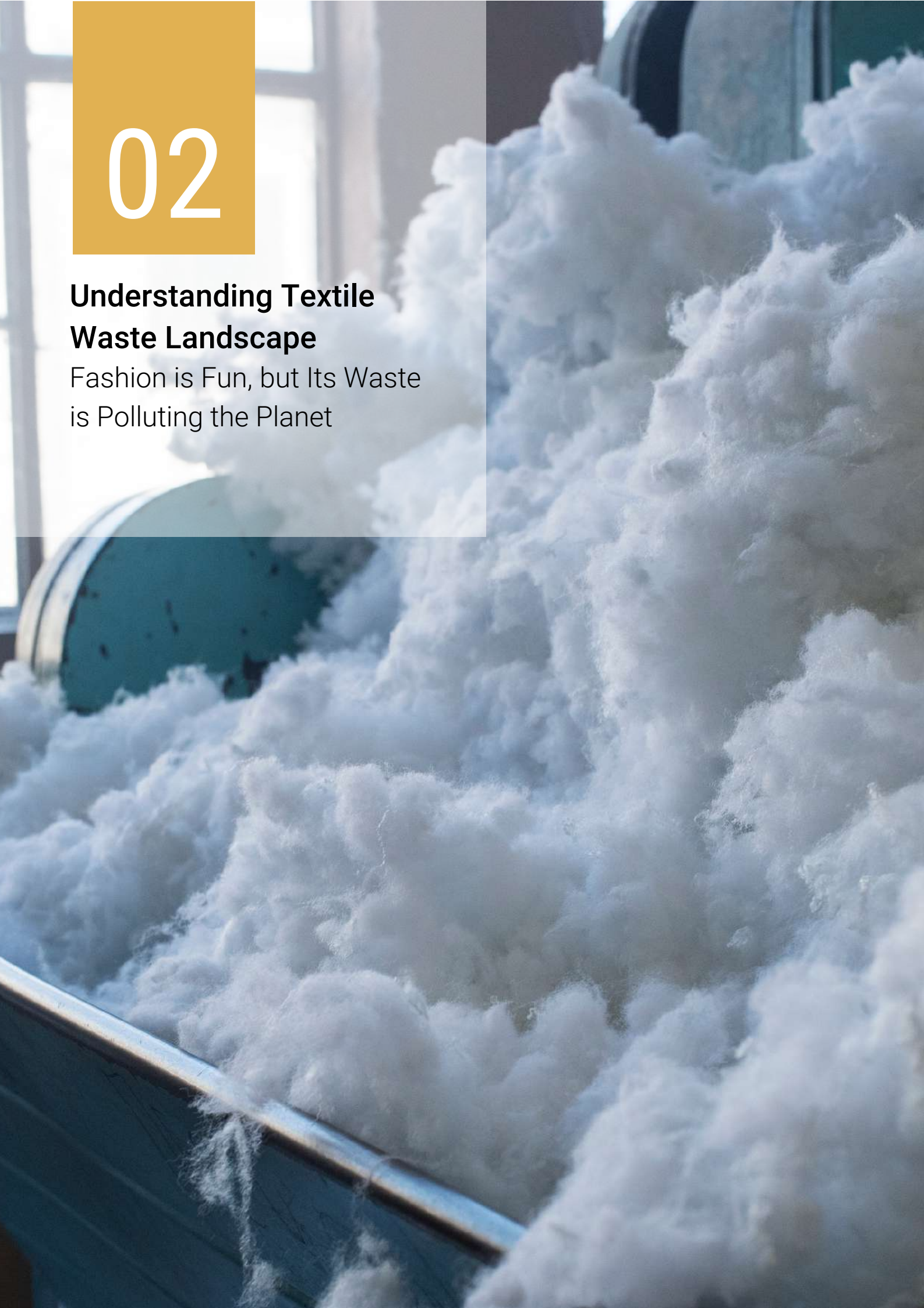


1.2 Maharashtra Textile Industry has a Historic Legacy and Key Economic Importance

Maharashtra has been an integral part of India's textile sector. The state has a strong textile legacy, housing a mix of traditional handloom clusters, power loom units, and modern textile parks, making it a key player in India's textile ecosystem. The State state continues to be a leading textile producer, supported by modern infrastructure, skilled labor, and government initiatives. Mumbai, often referred to as the fashion capital of India, drives innovation and trends, reinforcing Maharashtra's prominence in the textile and apparel sector.

Advantage Maharashtra

10.4%	Of country's total textile & apparel production
10.2%	Of total employment in Textiles Sector
16%	Contribution to India's textile & Apparel exports
2nd	Largest Cotton Producer in India
3rd	Largest Exporter in Textile & Apparels



02

Understanding Textile Waste Landscape

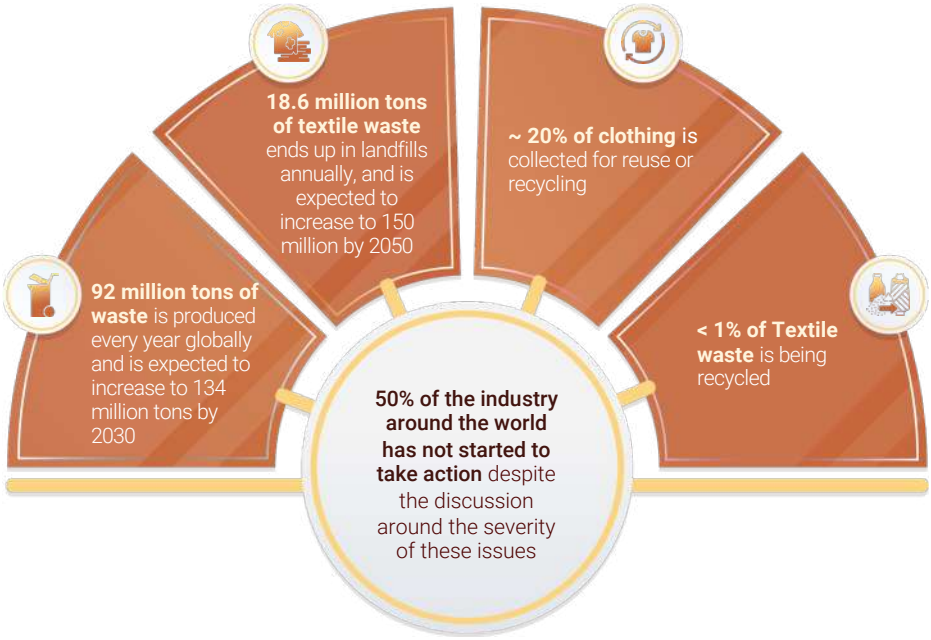
Fashion is Fun, but Its Waste is Polluting the Planet

2 Understanding Textile waste landscape | Global and India

In recent years, the fashion industry has found itself at the forefront of global sustainability discussions. The traditional **"take-make-dispose" model** has led to alarming levels of waste generation, with production and processing of virgin materials driving significant greenhouse gas emissions and excessive water consumption. In response, the industry is pivoting toward a more circular economy, actively taking steps to **"close the loop"** by reintegrating waste into the production cycle wherever possible.

Globally, over 90 million tons of textile waste are generated annually, with the number continuing to rise. This cycle of waste not only depletes resources but also accelerates environmental degradation, making sustainability and circularity in fashion more crucial than ever.

State of Textile waste globally – Report by Fashion For Good



India, a growing fashion hub, produces significant textile waste…

01 The pre-consumer, domestic post-consumer and imported waste results in the generation of **9.5 million tons** of textile waste in India annually, forming **8.5%** of global textile waste.

02 Out of the total waste generated, **59%** is reused or recycled. However, out of this share, only **10-40%** returns to the global supply chains. **43%** of domestic post-consumer waste ends up in landfills as compared to **1%** of pre-consumer and imported textile waste.

03 At present, nearly **61%** of the total waste generated in India is cotton-rich material. However, there has been a considerable increase in the quantity of synthetic textile (especially polyester) waste over the last five years.

Dark side behind the colours

Producing a garment can be resource-intensive
Estimated impact of producing one t-shirt

~11 Kg
CO2e emitted

~0.45+
kgs of chemicals used

2-7 m2
of land used

~380
liters of water consumed

2.1 Environmental and Economic impact of the Textile waste

The textile industry in India, while being a key contributor to employment and exports, is also a major generator of waste and pollution. The linear production model (**"produce-use-dispose"**) results in millions of tons of waste, economic losses, and significant environmental damage.

Environmental Impact

Textile Waste Generation: India generates an estimated **9 million tons of textile waste annually,** with only **15% being recycled.**

Landfill & Incineration: Over **85% of textile waste** ends up in **landfills or incinerators,** releasing hazardous greenhouse gases and toxic chemicals.

Water Usage: The textile industry consumes **5.9 trillion Liters of water annually,** contributing to water scarcity

Carbon Emissions: The sector emits around **34 million tons of CO_2** yearly, making it one of the biggest polluting industries.

Economic Impact

Value Lost Annually: Textile waste will lead to an economic loss of **$3.5 billion** in FY 2030.

Inefficiency Costs: Unused textile waste results in **higher raw material costs,** affecting profitability for manufacturers.

Employment Losses: The lack of a structured **recycling and circular economy framework is** preventing the creation of approximately **1 Lakh jobs** by 2030.

Ms. Neha Gupta Mr. Vinit Parikh

Founders | International Fashion Business Exchange Council

"Sustainability and circularity in textiles are no longer optional—they are imperative. As the global textile landscape evolves, India stands poised to lead by example, driving transformative change rooted in environmental responsibility. At IFBEC, we are committed to fostering meaningful engagement across the entire supply chain, uniting stakeholders to champion circular practices. Our initiatives are designed not only to promote sustainable production but also to elevate awareness and advocacy among producers and consumers alike. Through collaboration, innovation, and unwavering commitment, we can build a resilient and responsible future for the textile industry, setting a global standard for sustainable excellence."

03

Need for Transformation

Shifting from a linear "take-make-waste" model to a circular economy in textiles can unlock massive economic and environmental benefits.

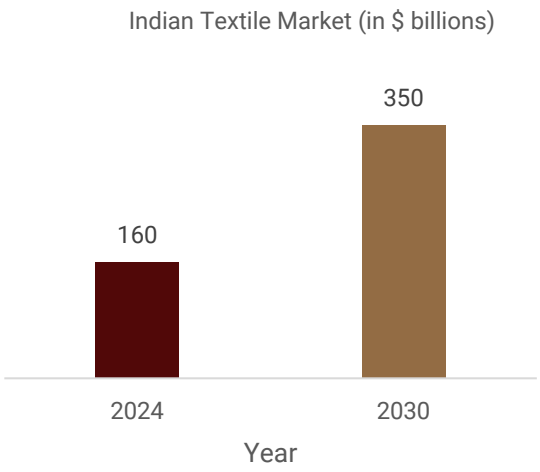
3 The Circular Economy | Transforming Waste into Opportunity

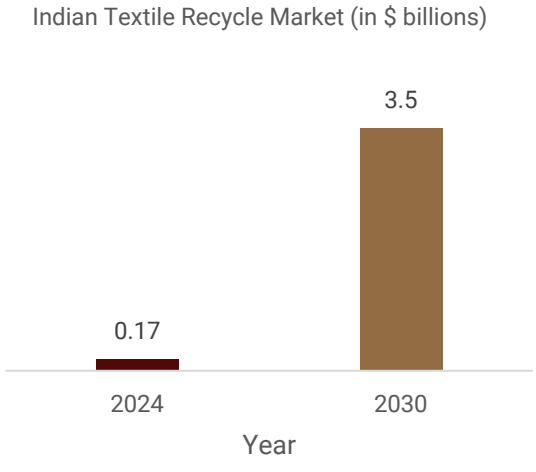
Economic Potential of zero-waste fashion for India

Adopting zero-waste fashion is not just an environmental imperative but also an economic opportunity for India. It can transform the textile and apparel industry into a more efficient, sustainable, and globally competitive sector.

The following graphs, prepared by Primus Partners, present an analysis of the significant and sustained growth in the fashion industry's market value, alongside the increasing necessity for the expansion of the textile recycling market from 2024 to 2030. **The projected market value of the textile recycling sector in India is expected to reach $3.5 billion by 2030**, driven by the rising demand for sustainable fashion solutions.

The rapid expansion of the textile recycling market highlights **potential to generate approximately 1 lakh new job opportunities in India in next 5 years**.





Note: The graph is prepared with the assumption that by 2030, Textile Recycle market in India will reach to a total of 1% of the total Textile Market size in India from the current 0.1%.

Environmental Potential of zero-waste fashion for India

The graph, developed as part of Primus Partners' analysis, illustrates the projected environmental impact of sustainable practices in the textile industry for a decade up to 2030. The **Carbon Emissions Reduced** are expected to grow substantially from 4 million tons of CO2 in 2020 to 25 million tons by 2030. Similarly, the **Textile Waste Diverted from Landfills** is projected to increase from 0.5 million tons in 2020 to 5 million tons by 2030, highlighting ongoing efforts to minimize waste through circular economy practices. This analysis underscores the dual advantages of sustainable measures in mitigating environmental impact while fostering responsible resource management over the decade.

Adopting sustainable and zero-waste practices in the textile industry can significantly reduce carbon emissions and minimize landfill waste, supported by improved recycling infrastructure.

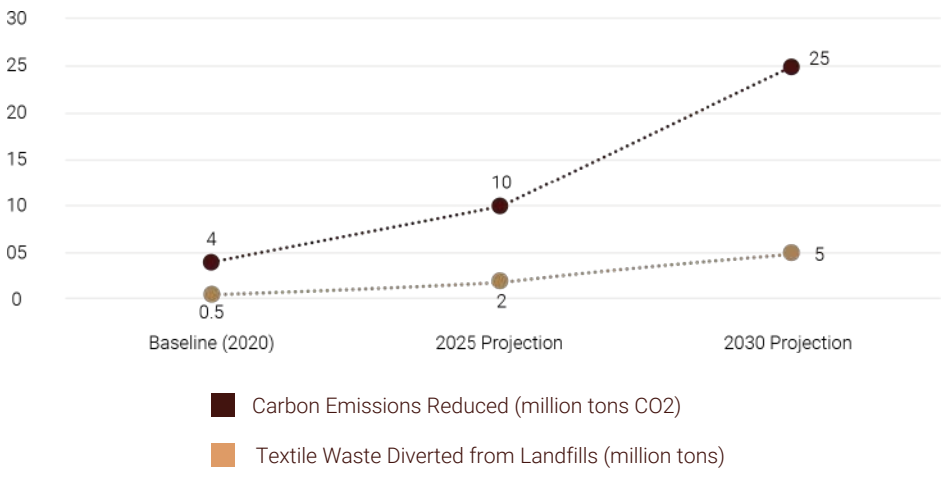
Mr. Jaideep Sajdeh

Joint Managing Director Texool Ltd

"At Texool we have been fortunate to have seen over 5 decades of textile recycling. How recycling has evolved to how upcyling became fashionable, the journey has been conjoined with rising disposals of incomes to environmental changes.

While a lot is to be done and achieved the heartening part is the words GLOBAL WARMING, SUSTAINABILITY AND CIRCULARITY are doing the corridors of every Government and Large Business conglomerates and houses globally.
We are hoping to see greater proactivity and acceptance of Recycled and upcycled materials in coming times. We will continue to strive to collect and process post consumer textiles, work closely with primary stakeholders towards more innovative solutions.

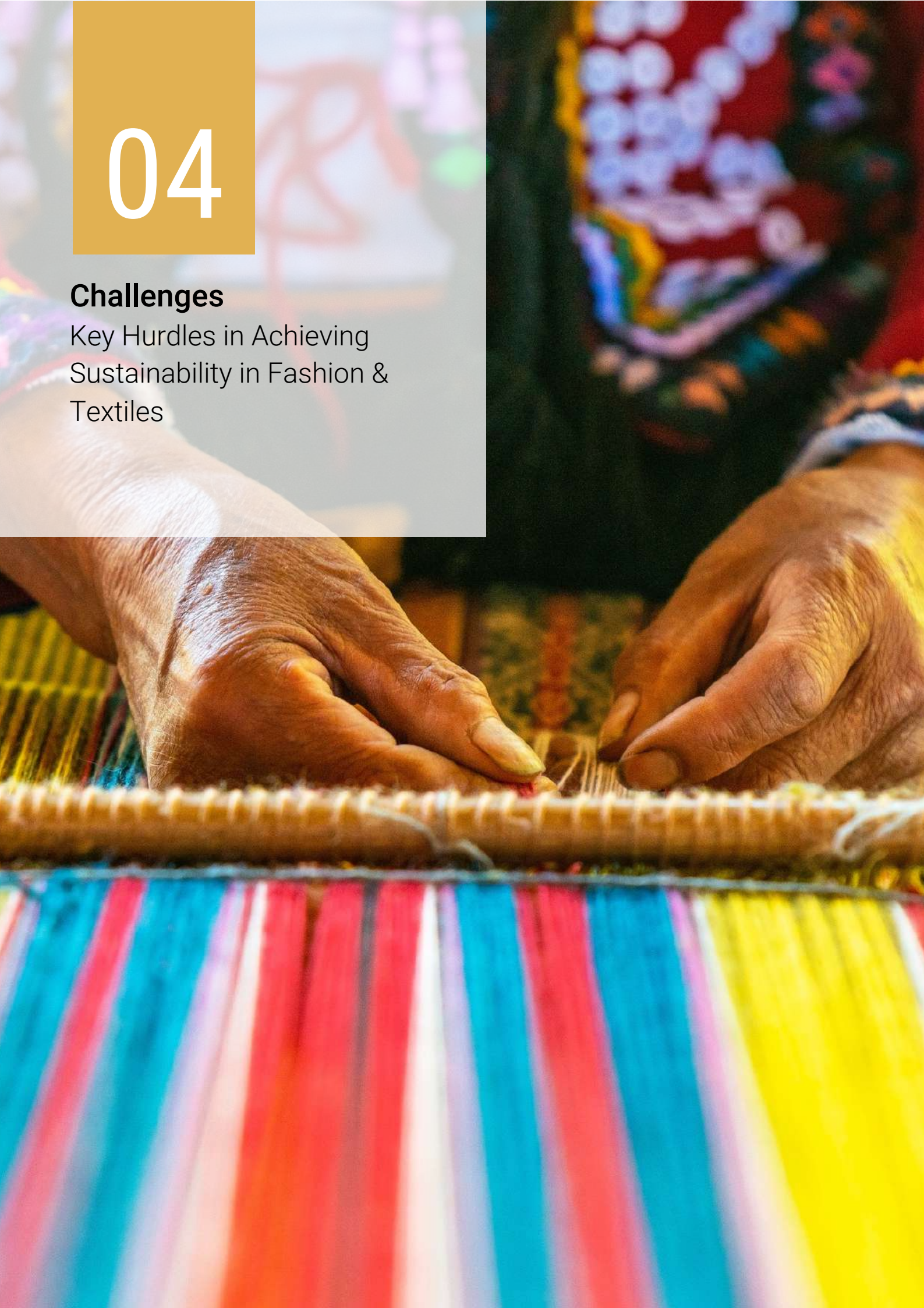
Texool ReFashion remains committed to being relevant and synonymous to textile recycling especially in these exciting times for this industry"



04

Challenges

Key Hurdles in Achieving Sustainability in Fashion & Textiles

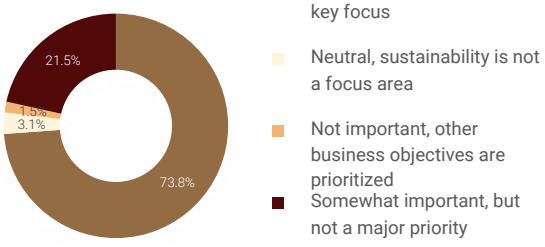


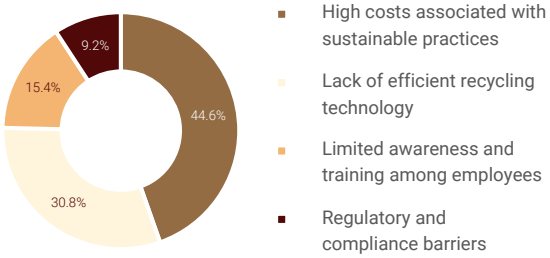
4 Challenges

The adoption of sustainable and green technologies in the textile sector faces several challenges across different stakeholders—industry, government, and consumers. A survey conducted with various textile industries and citizens revealed key challenges hindering this transition.

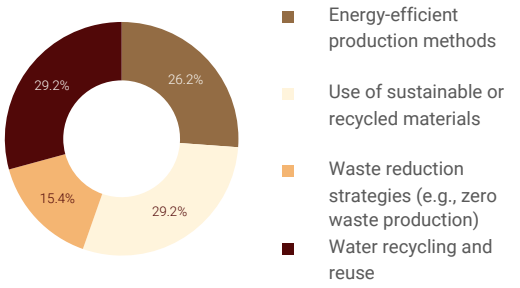
4.1 Industry-specific Challenges:

- **Financial Barriers to Sustainable Practices in the Textile Industry:** While 74% of industry stakeholders surveyed, consider sustainable practices integral to their company's overall strategy, 45% identify high initial investment costs as a primary challenge in implementing effective waste management solutions. For instance, establishing a Zero Liquid Discharge (ZLD) plant entails an expenditure of ₹8-12 crore per million Liters per Day (MLD), rendering it financially unfeasible for small and medium-sized textile enterprises.





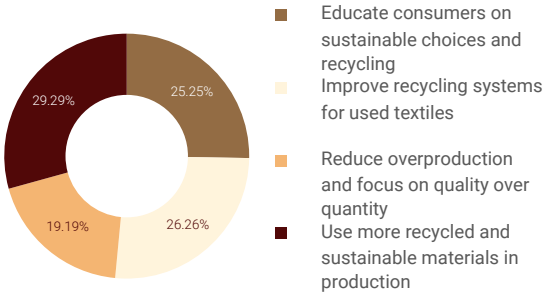
- **Limited Adoption of Sustainable Materials and Eco-Friendly Technologies:** Less than 30% of industries surveyed utilize sustainable or recycled materials and eco-friendly technologies. The adoption of advanced waterless dyeing methods, such as CO_2 dyeing, remains below 5% in India, primarily due to the lack of a skilled workforce and inadequate infrastructure.



- **Skill Gap & Resistance to Change -** A significant challenge facing the textile sector is the lack of skilled labor and reluctance to adopt sustainable practices. Over 75% of textile workers in India have no formal training in sustainable technologies, as highlighted in the ILO Report. (Source: ILO Report, 2023).

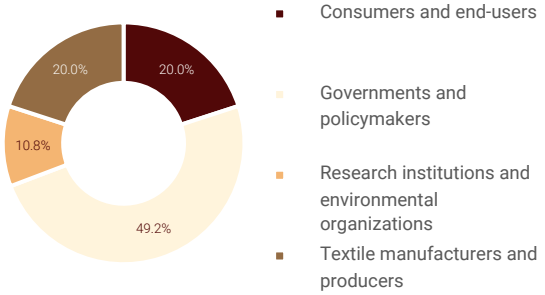
- **Lack of Transparency and Traceability:** The absence of robust transparency and traceability mechanisms impedes the accurate assessment of companies' environmental impact and limits accountability. According to Fashion Revolution's Fashion Transparency Index 2023, among the top 250 global brands surveyed, only 4% disclose the amount of textile waste generated during the annual reporting period, while 38% provide details on their initiatives for textile-to-textile recycling solutions.

- **Challenges in Quality and Fabric Composition:** Approximately 60% of textiles are inherently non-recyclable, primarily consisting of polyester and blended fabrics that are difficult to separate. As a result, these materials often end up in landfills or are incinerated, contributing to environmental degradation. A majority (55%) of citizens surveyed believe that the industry should prioritize the use of recycled and sustainable materials in production while also enhancing recycling processes and the integration of eco-friendly materials.



4.2 Government and Policy Challenges

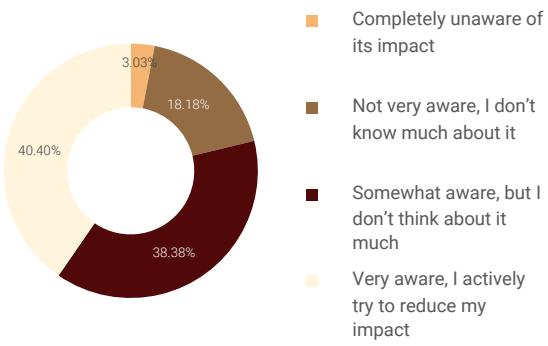
- **Inconsistent Regulations and Limited Policy Support:** A significant 49% of industry stakeholders surveyed believe that the government should play a leading role in promoting sustainable practices within the textile sector. However, the absence of a dedicated national policy for sustainable textiles and the lack of fiscal incentives for green technologies hinder progress in this area.



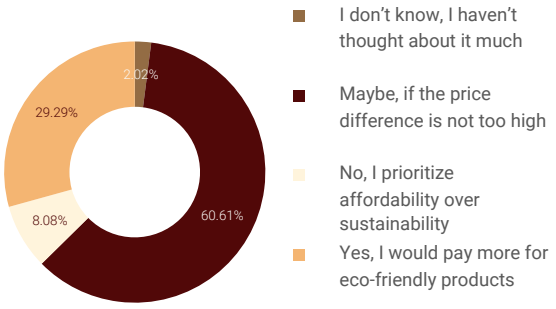
- **Fragmented and Informal Structure of the Textile Sector:** The textile industry remains largely unorganized, fragmented, and predominantly informal, with approximately 70% consisting of Micro, Small, and Medium Enterprises (MSMEs). The lack of structured record-keeping and transparency makes it challenging to track textile waste movement, leading to demand and supply imbalances. The government's limited capacity to accurately assess and support the sector may result in missed opportunities for growth and effective policy intervention.

4.3 Consumer and Market Challenges

- **Limited Awareness and Demand for Sustainable Products:** While consumer interest in eco-friendly choices is gradually increasing, sustainability remains a secondary priority for most Indian shoppers, who continue to prioritize affordability. As per our survey, a significant 56% either have limited awareness of sustainable products or do not consciously consider sustainability in their purchasing decisions.



This lack of awareness and demand presents a challenge for brands promoting eco-friendly alternatives, as consumer behaviour continues to be driven primarily by price sensitivity rather than environmental responsibility. 60% citizens surveyed are willing to pay a higher price for sustainable textiles if the price differential is not too high.



- **Impact of Social Media and Micro-Trends on Consumer Behaviour:** The rise of social media and online micro-trends has significantly influenced consumer purchasing habits, accelerating the shift toward ultra-fast fashion. On average, a garment is worn only 7 to 10 times before being discarded (Source: Ellen MacArthur Foundation) The prevalence of shorter trend cycles has normalized rapid consumption patterns, leading to increased textile waste and overproduction. Additionally, the time required for brands to introduce new styles has drastically reduced to 12–15 days, driven by real-time demand, compared to traditional production cycles that previously spanned several months.

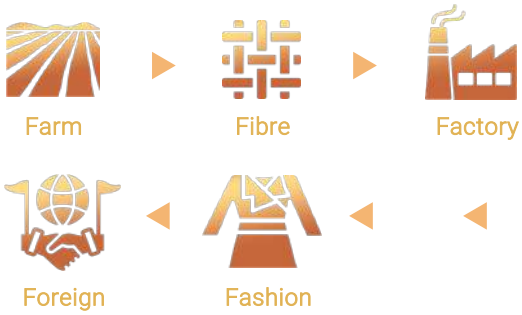
05

Strategic Framework

Building a Sustainable & Circular Textile Supply Chain for India

5 Strategic Framework for Zero-Waste Fashion

We have formulated a comprehensive strategic framework designed to transform India into a "zero fashion waste" country. This framework uses a "5F" approach—targeting



and integrates policy, innovation, stakeholder collaboration, and measurable performance indicators (KPIs). The framework is designed as a roadmap with short (S) - (1–2 years), mid (M) - (3–5 years), and long-term (L) - (5+ years) action plans –

The Overarching Principles of our Framework are:

Closing the Loop Embracing circular economy and closed-loop processes to minimize waste at every stage.

Stronger Together Stakeholder collaboration is essential; no single stakeholder can drive change alone.

Innovate to Elevate Leveraging cutting-edge technology and innovation for sustainable transformation.

Policy as a Catalyst Robust regulatory and fiscal support to accelerate industry-wide sustainability initiatives.

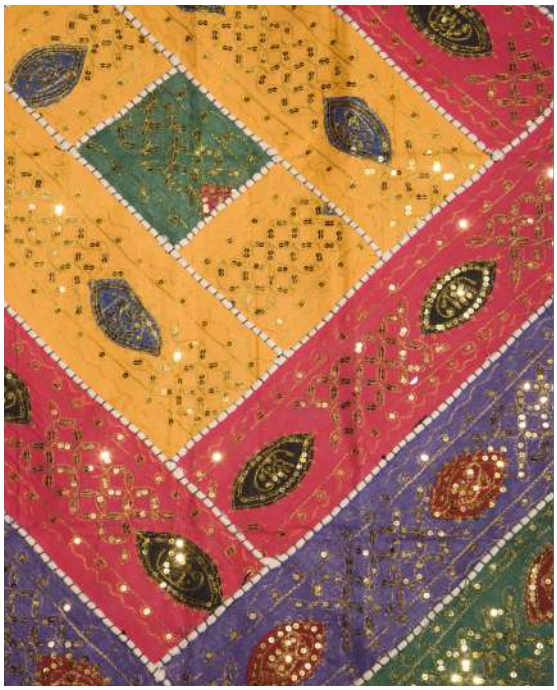
Beyond the 3 R's Engaging and educating consumers to make conscious, long-term sustainable choices.

Mr. Suresh Sodani

Managing Director - Century Enka - Aditya Birla Group

"At Aditya Birla Group, sustainability in textiles is not just an initiative—it's a responsibility. From circular fashion to reducing water and energy footprints, we are committed to driving meaningful change. The future of textiles lies in innovation, collaboration, and a deep commitment to responsible production. It's time for the industry to embrace regenerative practices, invest in sustainable materials, and create a supply chain that respects both people and the planet.

Thinking about Tomorrow! TODAY !!"



Our Strategic Framework

Farm

Objectives	Key Stakeholders	KPIs	Actions
• Shift to organic and sustainable agricultural practices • Promote diversification of crops to include natural fibers and innovative raw materials- Non-conventional yarn- bamboo, banana, ambadi, ghaypat	• Government- Central and State Agriculture Ministry and Departments • Farmers-Cooperative societies, individual cultivators. • Research & Academia: Agricultural universities, agritech startups.	• % of farmers switching to organic/sustainable practices • Reduction in water and chemical use per acre • Increase in sustainable fiber yield per hectare. • Number of farmers trained on sustainable practices.	• Launch incentive programs (subsidies, low-interest loans) for sustainable farming. (S) • Invest in R&D for new natural fibres and improved crop varieties. (M)

Fibre

Objectives	Key Stakeholders	KPIs	Actions
• Enhance the production and use of eco-friendly fibres • Promote recycling and upcycling of textile fibres • Encourage development of bio-based, innovative and non-conventional fibers- bamboo, banana, ambadi, ghaypat etc	• Fiber Producers: Conventional and Non-conventional Fibers • Textile Mills: Companies focusing on recycling and fiber blending • Industry Associations - Non-Conventional Fibers Association	• % of recycled or sustainably sourced fiber used in production • Number of new sustainable fiber products developed. • Reduction in fiber waste during processing	• Introduce certification programs for sustainable fibers. (M) • Set minimum recycled fiber usage thresholds for textile producers. (M) • Support pilot projects and focusing on fiber recycling technology. (S)

Factory

Objectives	Key Stakeholders	KPIs	Actions
• Optimize manufacturing processes to minimize waste generation. • Implement closed-loop production practices that recycle scraps back into production. • Use Green technology including- Solar plants , ETP, ZLD	• Government Agencies: Ministry and Department of Textiles, Environment • Certification Bodies: Agencies for sustainability and waste management • Manufacturers: Garment and textile factories. • Industrial Bodies and Association working on Circular economy practices	• Reduction in waste generated per unit of production. • % of production waste re-entered into the production cycle. • Energy and water use per unit of production. • Number of factories achieving zero waste or eco-friendly certifications. • No of factories using Non-conventional sources of energy. • No of factories using Treated wate water or have technologies such as SIPT, ETP and ZLD	• Develop central guidelines and best practices for zero waste manufacturing. (L) • Provide fiscal incentives for factories investing in waste-reduction technologies- ETP, ZLD etc (S) • Implement real-time waste tracking systems using IoT and data analytics. (M) • Fiscal incentives to be provided for establishment of recycling plants in States. (M) • Promote newer technologies such as waterless dyeing. (S) • Mandatory water audit and a star-rating system for treated water usage in factories should be implemented. (M)

Fashion

Objectives	Key Stakeholders	KPIs	Actions
• Encourage sustainable design principles that promote longevity, recyclability, • Shift consumer mindsets toward sustainable fashion • Empower designers and brands to innovate with sustainability as a core value. • Establish collection mechanism at Municipality level such that textiles does not reach landfill.	• Designers & Brands- Local and National designers • Retailers: Multi-brand outlets, e-commerce platforms • Consumers: End-users and fashion influencers. • Educational Institutions: Fashion schools incorporating sustainability in curricula	• % of brands launching sustainable or circular fashion lines. • Improvement in consumer sustainability index (via surveys). • Growth in market share for sustainable fashion segments.	• Organize national fashion weeks or competitions focusing on sustainability. (S) • Implement standardised labeling systems that inform consumers about product lifecycle and recyclability. (M) • Provide training for designers integrating circular design principles in textile colleges and universities. (S) • Launch public awareness campaigns and educational initiatives on sustainable consumption. (S) • Subsidize modern machinery that reduces waste (e.g., automated cutting, digital printing). (M)

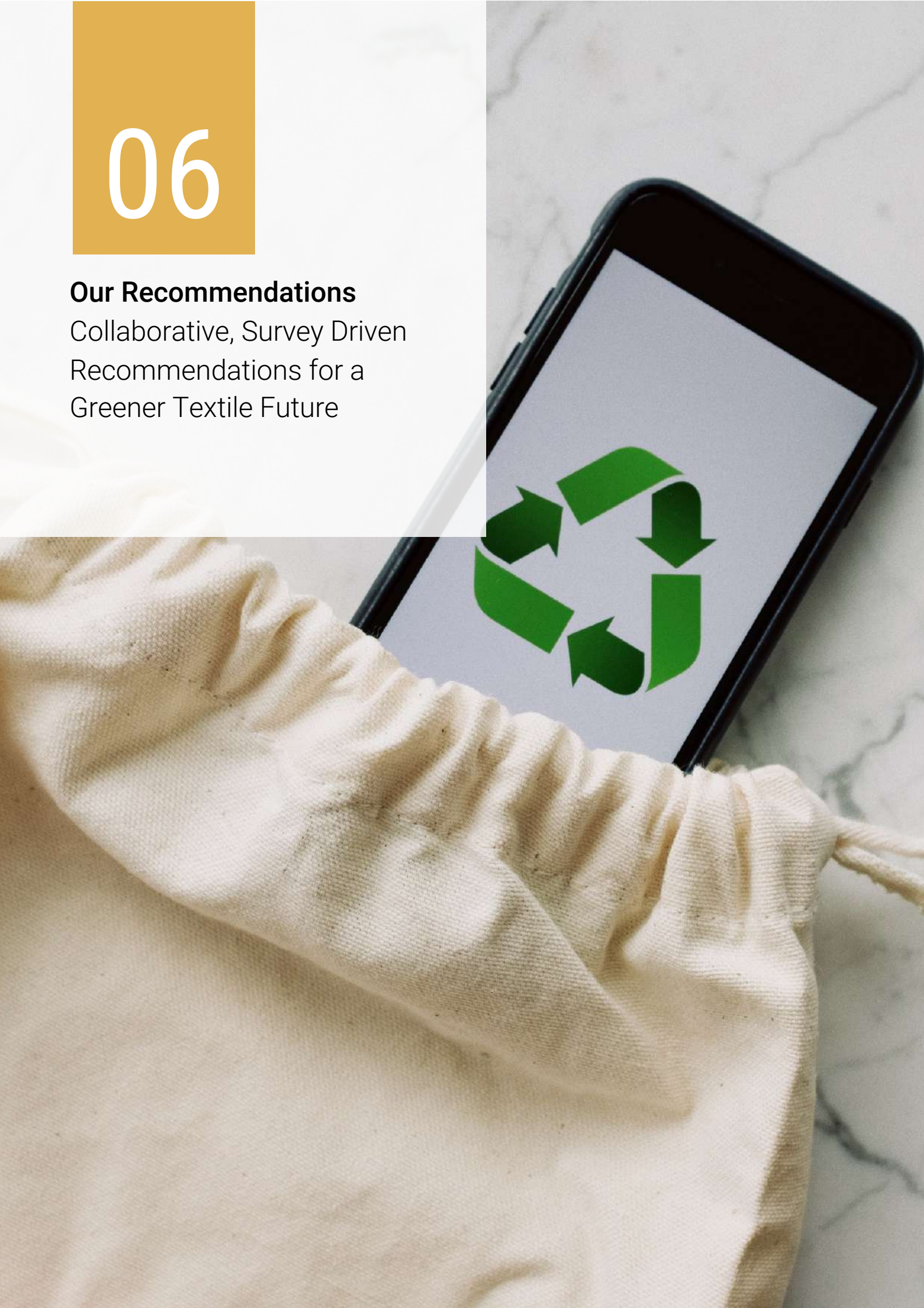
Foreign

Objectives	Key Stakeholders	KPIs	Actions
• Align India's textile practices with global sustainability standards. • International partnerships to exchange technology, best practices, and market opportunities. • Enhance export opportunities for sustainable textiles and recycled products.	• Government- Ministry of Commerce and Industry, Ministry of Textiles and State Textile Departments. • Trade Organizations: Export promotion councils, international trade bodies. • Trade Organizations: Export promotion councils, international trade bodies • Industry Associations-	• % of textile exports that are sustainable or recycled. • Number of Indian products meeting global sustainability standards. • Number of bilateral/multilateral agreements focusing on sustainable trade.	• Participate in global forums and certification programs (e.g., Global Organic Textile Standard). S • Create bilateral agreements for technology exchange and joint ventures in sustainable textile innovation. L • Use trade missions to promote India as a hub for zero waste fashion and sustainable textiles. L • Promote trade policies that favor sustainable textile products. M

06

Our Recommendations

Collaborative, Survey Driven Recommendations for a Greener Textile Future



6 Our Recommendations

Mr. Nikunj Bagdia

Managing Director, Ken India

"India has always been a pioneer in sustainability—long before it became a global movement. From repurposing old textiles into quilts and household essentials to our thriving second-hand and upcycling markets, circularity has been deeply embedded in our culture. Just as we have set global benchmarks in auto emission standards, we now have the opportunity to lead the world in textile sustainability.
By embracing zero waste fashion, we can combine traditional wisdom with modern innovation—scaling textile recycling, investing in skill development for repair and reuse, and enforcing responsible manufacturing. With policy support, industry commitment, and consumer awareness, India can not only achieve zero fashion waste but also set a precedent for the world in sustainable textiles."

Financial Incentives & Support	A.1	Implementing subsidies for green initiatives and sustainable technology adoption in textile enterprises to reduce infrastructure costs
	A.2	Forming a Dedicated Fund for circular economy initiatives
Textile-waste Infrastructure & Market Development	B.1	Developing waste collection infrastructure through Textile Waste Collection Centres to handle post-consumer waste
	B.2	Launching a unified B2B Digital Marketplace to manage pre-consumer waste
Policy & Regulatory Framework	C.1	Drafting a National Policy for Sustainable Textiles
	C.2	Drafting an Extended Producer Responsibility (EPR) Scheme specifically for textiles
Transparency, Information & Awareness	D.1	Revising Textile Labelling Regulations for consumer textiles
	D.2	Launching Public Awareness and Educational Campaigns on responsible consumption and eco-friendly fashion
	D.3	Skill Development and Education for a Zero-Fashion Waste India

A.1 Financial Incentives & Support

Implementing subsidies for green initiatives and sustainable technology adoption in textile enterprises to reduce infrastructure costs- The State Government should provide fiscal incentives implementation of technologies that encourage environmentally friendly practices such as **Zero Liquid Discharge** (ZLD) systems, effluent treatment plants, wastewater treatment plants etc.

Mr. Kanishk Maheshwari

Co-Founder & Managing Director
Primus Partners Pvt. Ltd

"As industries strive for sustainability, it is imperative to implement measures like a Water Star Rating system to track and optimize water usage in the textile sector. By integrating circularity principles—such as wastewater recycling, responsible sourcing, and closed-loop production—businesses can significantly reduce their environmental footprint. Sustainable growth is no longer a choice but a necessity, and adopting such frameworks ensures resilience, efficiency, and long-term value creation for both industry and society."

CASE STUDY

Case Study 2 | Arvind Mills (India) – Zero Liquid Discharge (ZLD) Technology

Background:

Arvind Mills, a leading Indian textile manufacturer, has adopted Zero Liquid Discharge (ZLD) systems in its denim production units. Their factories in Gujarat treat and reuse 90% of wastewater, significantly reducing their water footprint.

Key Outcomes:

- 92% wastewater recycled, reducing freshwater usage.
- Adoption of bio-based dyes to reduce chemical pollution.
- 30% reduction in production costs through circular waste management.

Lessons for India:

- Incentivizing ZLD and green technology adoption can drive sustainability in textile hubs.
- Real-time waste tracking systems (IoT & AI) can help optimize production efficiency.

Implementing Subsidies for Green Initiatives- Textile enterprises adopting green manufacturing practices can be incentivized through **a star-rating system** based on water consumption, assessed via a comprehensive water audit and displayed on their products. A water audit will help track, measure, and optimize water usage across operations, identifying areas for reduction, reuse, and recycling.

The star-rating system can incentivize industries by grading factories based on their water efficiency, similar to energy ratings. High-rated factories could receive tax benefits, certification advantages, and preferential market access, encouraging widespread adoption of sustainable water management practices. This initiative will promote sustainability, reduce infrastructure costs, and encourage responsible resource management within the textile industry.

Financial Incentives for Alternative & Eco-Friendly Textile Materials- To promote sustainability and reduce dependence on conventional textile fibers, government policies should incorporate financial incentives for the adoption and production of alternative, eco-friendly materials such as hemp, bamboo, pineapple, banana, and other non-conventional fibers. These incentives could include subsidies, low-interest loans, and grants for manufacturers and startups investing in research, production, and large-scale adoption of these materials.

A.2 Establishing a State-Level Green Fund to Support Textile Sustainability

Every state should establish a **dedicated Green Fund** to support **sustainable and circular economy initiatives** in the textile sector. Such a fund has the potential to unlock significant economic value and provide employment opportunities by attracting both domestic and international investments while addressing critical environmental challenges in the industry.

This initiative can **foster innovation and entrepreneurship** in key areas such **as waste management, textile recycling, and sustainable product design.** The funds can be strategically allocated to **R&D in circular technologies, capacity-building programs, development of recycling infrastructure, and advanced waste management solutions.**

Textile-waste Infrastructure & Market Development

B.1 Establishing a Dedicated Mechanism for Textile Waste Collection to Prevent Landfill Accumulation-

A well-structured textile waste collection infrastructure is essential to ensure that discarded textiles do not end up in landfills, exacerbating environmental concerns. Textile Waste Collection Centres should be established at the local level across India, dedicated to efficiently managing household post-consumer textile waste. These centers can serve as primary collection points, from where waste can be redirected to Textile Recycling Hubs for further segregation, repurposing, and processing into new materials. Additionally, the government can collaborate with institutions, industry stakeholders, and non-profit organizations to create an integrated waste collection and recycling network.

less than **50% of India's total textile waste is collected,** with a significant portion comprising **domestic post-consumer waste, particularly discarded clothing.**

B.2 Establishing a Unified B2B Digital Marketplace for Managing Pre-Consumer Textile Waste

Establishing a Unified B2B Digital Marketplace dedicated to handling pre-consumer textile waste at multiple levels, ensuring **structured, transparent, and efficient waste flow** across the industry. This **technology-driven platform** would serve as a **centralized hub** connecting **textile manufacturers, recycling units, upcycling brands, and raw material processors,** enabling them **to trade, repurpose, and recycle industrial textile waste** efficiently. By integrating **Internet of Things (IoT)-enabled sensors, blockchain-based traceability systems, and AI-driven analytics,** the marketplace can **track waste movement in real time, enhance supply chain visibility, and optimize resource allocation.** These digital solutions would ensure that surplus materials from large textile units are efficiently redistributed to small and medium-sized enterprises (SMEs) and recycling industries, reducing raw material dependency and landfill accumulation. The platform would also address the challenge of inconsistent textile waste supply by facilitating on-demand waste sourcing and predictive inventory management using big data analytics.

By **leveraging digital tracking technologies**, the **B2B marketplace** would promote **end-to-end traceability,** allowing businesses and regulators to **monitor textile waste movement, assess sustainability compliance, and measure circular economy impact.** Additionally, the platform can be **integrated with government sustainability frameworks** and **certification bodies,** ensuring compliance with **Extended Producer Responsibility (EPR) policies** and promoting adherence to global sustainability standards. Overall, the **B2B Digital Marketplace** would **revolutionize India's textile waste management ecosystem by streamlining waste collection, improving resource efficiency, and fostering a circular economy.**

Policy and Regulatory Framework

C.1 Drafting A National Policy for Sustainable Textiles

- A **National Policy for Sustainable Textiles** is essential to promote **sustainability, circularity, and ethical production** across the textile value chain. It should define **clear guidelines** for **raw material sourcing, responsible manufacturing, waste management, and product lifecycle regulation,** ensuring industry-wide sustainability compliance.
- The policy must establish **mandatory sustainability certifications** like **GOTS and OEKO-TEX,** support **green technologies, circular economy models, and fair labor practices,** and align with initiatives such as **the National Technical Textiles Mission (NTTM) and other schemes.** By integrating **financial incentives and research support,** it can drive large-scale industry transformation.
- A strong **policy and regulatory framework** will position India as a global leader in **zero-waste fashion**, enhancing **competitiveness, innovation, and sustainable textile manufacturing.**

C.2 Drafting an Extended Producer Responsibility (EPR) Scheme for Textiles

- An **Extended Producer Responsibility (EPR) framework** for textiles is crucial to address the challenges posed by **blended fabrics and non-recyclable materials,** which currently make up **60% of textile waste**. Given the complexity of recycling mixed-material textiles, an **EPR scheme** would mandate **manufacturers to take responsibility for the entire lifecycle** of their products, including **collection, sorting, and recycling,** thereby reducing waste accumulation and landfill dependency.

- Beyond waste management, an EPR policy shall **innovative business models** like **clothing rentals, peer-to-peer fashion exchanges, second-hand marketplaces, and upcycling initiatives,** thereby extending product lifecycles and minimizing textile waste. Additionally, brands can be incentivized to implement **take-back programs, repair services, and textile repurposing initiatives, creating a more circular and responsible fashion ecosystem.**

Transparency, Information & Awareness

D.1 Revising Textile Labelling Regulations for Consumer Textiles

Updating **India's textile labelling regulations** is essential to enhance **transparency, sustainability, and consumer awareness**. Labels should include **environmental impact details, recycling instructions, and material origin**, enabling **eco-conscious consumers to make informed choices** while simplifying the sorting and recycling process. Inspired by **EU's EcoDesign for Sustainable Products (ESPR),** India can implement **Digital Product Passports (DPPs),** ensuring greater traceability by **2027.** Some brands, like **Westside and Birla Cellulose's Liva Reviva,** have already introduced **blockchain-based tracking solutions**. By integrating **QR codes and blockchain technology**, the textile industry can **increase transparency, promote sustainability, and empower responsible consumer behaviour.**

D.2 Launching Public Awareness and Educational Campaigns on Responsible Consumption and Eco-Friendly Fashion

Raising consumer awareness is crucial to promoting **responsible consumption and eco-friendly fashion choices**. The government can leverage **digital media and nationwide campaigns** to educate citizens on the **environmental impact of the textile industry** and encourage **sustainable purchasing behavior**. Successful global initiatives, such as **Fashion Revolution's "Who Made My Clothes?" campaign,** have demonstrated the power of digital activism, garnering **over 156 million impressions** and sparking critical discussions on ethical fashion.

Organizing **pop-up shops, flea markets, and sustainability bazaars** in major cities can promote **local, eco-conscious brands** and encourage the adoption of **recycled and upcycled textiles.**

Complementing initiatives like **One District One Product (ODOP)** can also play a pivotal role in **supporting artisans and traditional weavers,** by showcasing **handloom, biodegradable, and low-impact textiles.** Through a **multi-channel awareness approach,** India can foster a **culture of conscious consumption,** strengthening the demand for **sustainable and circular fashion practices.**

D.3 Skill Development and Education for a Zero-Fashion Waste India-

Achieving a zero-fashion waste future for India requires a skilled workforce and industry-wide knowledge enhancement. Introducing specialized courses on sustainable textiles, circular economy practices, and textile waste management in universities, fashion institutes, and vocational training centers will equip professionals with the technical expertise needed to drive sustainability in the sector.

Dr. Sharmila J. Dua

Ex-Dean & Prof. MDes Department
National Institute of Fashion Technology

"Achieving a sustainable society can only be possible through education for sustainable development to be incorporated at all levels of formal education and training, as well as in non-formal and informal learning. The methodology requires participatory teaching and learning methods that motivate and empower learners to use critical thinking by imagining future scenarios leading to collaborative decisions. This requires far-reaching systemic changes to ensure that sustainability is at the heart of education, bolstered by training and capacity building of educators."

Dr. Sachin Kore

Director, VJTI

"Empowering the future of fashion begins in the classroom. By integrating sustainability into textile education, we equip our youth with the skills and knowledge to drive India towards a zero fashion waste future—where innovation, circularity, and responsibility define the industry."

Additionally, upskilling workers in green manufacturing processes, including waste recycling, sustainable fiber production, and digital traceability systems, will accelerate the adoption of eco-friendly innovations. Government-led initiatives, in collaboration with industry experts and educational institutions, can integrate practical training modules, certifications, and research programs, ensuring that India's textile workforce is future-ready to support a circular and sustainable economy

CASE STUDY

Case Study 2 | Stella McCartney (UK) – Circular Design & Consumer Awareness

Background:

Stella McCartney is a pioneer in circular fashion, using recycled polyester, plant-based leather, and organic cotton in her collections. She has partnered with Ellen MacArthur Foundation to drive awareness about closed-loop fashion.

Key Outcomes:

- 50% of raw materials used are sustainable or recycled.
- Development of "Infinite Loop" fashion model, where customers return old garments for recycling.
- Collaboration with Bolt Threads to develop lab-grown alternative fabrics.

Lessons for India:

- Circular fashion education in NIFT, NID, and other design institutes can drive awareness among young designers.
- Labelling systems that inform consumers about a product's lifecycle can influence purchasing decisions.

S.No.	Recommendation	Challenges addressed	Potential Impact
A.	**Financial Incentives & Support**		
A.1	Introducing **Subsidies** for green initiatives and sustainable technology adoption by textile enterprises	**Industry-specific:** • High capital investments especially for small and medium textile enterprises • Access to newer technologies Slower adoption of technologies **Government & Policy:** • Limited Incentives for Sustainable Practices	Increased adoption of green initiatives and sustainable technologies by textile enterprises.
A.2	Forming a **Dedicated Fund** for circular economy initiatives	**Industri-specific:** • High capital investments especially for small and medium textile enterprises • Access to newer technologies • Skill Gap & Resistance to Change	Growth in domestic and international investments as well as innovation and entrepreneurship w.r.t textile waste management.
B.	**Textile Waste Infrastructure & Market Development**		
B.1	Developing waste collection infrastructure through **Textile Waste Collection Centres** to handle post-consumer waste	**Government & Policy:** • Fragmented and unorganised textile sector with demand/ supply gaps for textile waste • Complexity of textile supply chains	Stronger waste management infrastructure with streamlined textile-waste collection process, especially for post-consumer waste.
B.2	Launching a unified **B2B Digital Marketplace** to manage pre-consumer waste	**Government & Policy:** • Fragmented and unorganised textile sector with demand/ supply gaps for textile waste **Industry-specific:** • Lack of transparency and traceability	An organised and easy-to-monitor platform for trade of pre-consumer textile waste, ensuring consistent textile waste supply.
C.	**Policy & Regulatory Framework**		
C.1	Drafting a **National Policy for Sustainable Textiles**	**Industry-specific:** • Quality concerns and fabric compositions **Government & Policy:** • Lack of Consistent Regulations & Policy Support	Well-defined uniform standards, compliances and regulations on sustainability.
C.2	Drafting an **Extended Producer Responsibility (EPR) Scheme** specifically for textiles	**Industry-specific:** • Lack of transparency and traceability • Quality concerns and fabric compositions **Government & Policy:** • Fragmented and unorganised textile sector with demand/ supply gaps for textile waste	Reduced environmental impact by fixing accountability on producers for their products' lifecycle, thereby encouraging practices such as recycling and reuse.

S.No.	Recommendation	Challenges addressed	Potential Impact
D. Transparency, Information & Awareness			
D.1	Revising **Textile Labelling Regulations** for consumer textiles	**Industry-specific:** • Lack of transparency and traceability **Consumer & Market:** • Low Awareness & Demand for Sustainable Products • Incorrect or incomplete labelling on textile products	Helping eco-conscious consumers make more informed decisions, easing the sorting and recycling process, and tackling greenwashing.
D.2	Launching **Public Awareness and Educational Campaigns** on responsible consumption and eco-friendly fashion	**Consumer & Market:** • Low Awareness & Demand for Sustainable Products • Overconsumption due to social media and the rise of online micro-trends	Increased awareness among citizens about the implications and impact of textile sector, inspiring them to make sustainable decisions.
D3	**Skill Development and Education for a Zero-Fashion Waste India-**	• **Lack of skilled workforce in sustainable textile production, waste management, and circular economy practices.** • **Limited awareness and training on green manufacturing technologies, textile recycling, and eco-friendly materials.**	Workforce upskilling in sustainable textile techniques, enabling widespread adoption of zero-waste practices. Integration of sustainability-focused courses in fashion and textile education, encouraging innovation and responsible production.

07

Maharashtra's Integrated and Sustainable Textile Policy

State's Vision to drive economic growth, environmental sustainability, and innovation within the textile sector.

महाराष्ट्र शासन
वीण समृद्धीची

Introduction

Maharashtra has recently launched a new Integrated and Sustainable Textile Policy, aimed at strengthening value chain integration, minimizing waste, and promoting sustainable textile practices. The policy focuses on enhancing collaboration between different segments of the textile industry, from fiber production to finished garments, ensuring a seamless and resource-efficient ecosystem. By encouraging waste reduction, recycling, and adoption of green technologies, the policy aligns with India's broader vision of a zero-fashion waste economy. Additionally, it provides incentives for sustainable manufacturing, eco-friendly fibers, and circular economy initiatives, positioning Maharashtra as a leader in responsible textile production. Through this comprehensive approach, the state aims to drive economic growth, environmental sustainability, and innovation within the textile sector.

Vision

Integrated and Sustainable Textile Policy of the State is in line with the 5F vision of the Government of India- Farm to Fiber to Factory to Fashion to Foreign. The policy envisions integrating the whole textile value chain and create an enabling environment for sustained growth of all sub-sectors in the industry. The policy will strengthen the supply chain management of the textile sector and effectively disseminate information to all the stakeholders on ground to make them aware about the provisions and incentives in the policy. The Government will encourage sector-wide collaborations to accelerate a just transition towards sustainable textile value chain through 3-R model viz Reduce, Reuse and Recycle.

State's Initiatives Towards Making India a Zero-Waste Fashion Country

Green Subsidies

Support for Effluent Treatment Plants (ETP) and Common Effluent Treatment Plant (CETP) - 50% capital subsidy or INR 5 crore whichever is less for establishment of Effluent Treatment Plants (ETPs)

Support for Zero Liquid Discharge (ZLD)- 50% of eligible civil infrastructure/ plant & machinery cost up to a maximum of INR 10 Crore for setting up of ZLD plants

Support for installation of solar power plant- 20% up to a maximum of INR 4.8 crore whichever is less for setting up solar power plant per unit.

Research and Development

Promotion of Research and Development and Innovation to promote environment friendly processes/ technologies in textile sector.

Collaboration with institutes of excellence including IITB, VJTI, DKTE, ICT, SASMIRA, BTRA for research and development

महाराष्ट्र शासन

वीण समृद्धीची

Infrastructure support

Setting up of 12 Recycling Projects- As part of sustainability, subsidy @ 50% or INR 2 crore, whichever is less, for new projects set up exclusively for recycling of old textile products.

Emphasizing the use of Information Technology to promote ease of doing business.

Skill Development

Provide support for skill development and capacity building to ensure availability of skilled manpower to textile industry and increase employability in the sector. MoU signed with institutes of excellence such as MSSU, Skill Development Society, IITB, VJTI, DKTE, ICT, SASMIRA and BTRA.

Short term courses/ vocational training programs will be run by the Skills, Employment, Entrepreneurship and Innovation Department through ITI's and Vocational training providers

Maharashtra Technical Textile Mission

State has launched Maharashtra Technical Textile Mission to establish Maharashtra as a leader in the technical textile sector through continued innovation, encouraging sustainability, competitiveness, and creating a thriving ecosystem for industry stakeholders.

Mr. Virendra Singh

Secretary Public Health & Former Secretary Textiles

"Maharashtra has taken proactive steps towards building a sustainable textile future by introducing significant initiatives, including fiscal incentives to promote green technology including ETP, ZLD, Solar plants and Recycling Units. As the textile industry faces increasing environmental challenges, transitioning to a circular and sustainable economy is the need of the hour. Adopting sustainable practices will not only reduce waste and conserves resources but also enhance long-term competitiveness and resilience of the sector. I hope the industry leverages these opportunities, and moves towards a greener, more sustainable future."

महाराष्ट्र शासन

About Textiles Department

The Department of Textile, Government of Maharashtra comes under the aegis of Cooperation, Marketing, and Textile Department and is responsible for the development and promotion of the textile industry in the State. The Department plays a significant role in implementing schemes and programs that have helped improve the quality of textile products in Maharashtra and create employment opportunities in the industry. The Department is committed to further developing the textile industry in Maharashtra with a strong presence of both traditional and modern textile sub-sectors and aims to make the state a global hub for textiles.

The Department is assisted by its field offices, namely the Commissionerate of Textiles and the Directorate of Sericulture located in Nagpur.

The textile industry is a major driver of economic growth in Maharashtra, and it is expected to continue to grow in the coming years. The state government is committed to support the growth of the industry and has put in place several policy initiatives to help its beneficiaries remain competitive in the global market.

Vision

To develop, regulate and promote an integrated, sustainable, and advanced Textiles sector in Maharashtra, progressively realizing the 5F vision of the Government of India – Farm to Fiber to Factory to Fashion to Foreign.

Mission

To leverage and advance the current position of Maharashtra towards becoming a leading national
and global player in the Textiles and Apparel sectors.
About Textiles Department - The Textiles Department, through the e-Textile Portal, has fully automated its processes, allowing textile units to seamlessly register, obtain a Textile Registration Number (TRN), and apply for subsidies with ease. The link to the e-Textile Portal is on the Department's website.

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Primus Partners has been set up to partner with clients in 'navigating' India, by experts with decades of experience in doing so for large global firms. Set up on the principle of 'Idea Realization', it brings to bear 'experience in action'. 'Idea Realization'— a unique approach to examine futuristic ideas required for the growth of an organization or a sector or geography, from the perspective of assured on ground implementability.

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