Reliance
Industries Limited

Opportunity in the Textile & Textile Engineering Industry in India

29 Oct 2025

Flow

1. Global Economy Overview
2. Indian Economic Strength
3. Opportunity for Indian Textile Industry
4. Role of Reliance Industries

Global Economy Overview

Challenging Global Economy

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Tariff war causing economic uncertainty
- US imposed reciprocal tariffs on multiple countries
- Impact on Global GDP ~0.5% and trade growth ~1-2%

Geopolitical concerns
- Russia-Ukraine; Escalations in Middle East

Supply chain realignment / disruptions
- Tariff wars and shipping route risks – Freight costs up 30-200% on key routes
- Transit time up by 7 – 14 days

Crude prices remained volatile
- Prices drastically down from $81 (2024) to $66 (2025)
- Opec+ unwinding cuts resulting in oversupply

China undertaking restructure of capacity
- Anti-Involution policy to phase out ageing assets > 20 yrs: **9.5 MMT (11% capacity)**

Global economy facing uncertain times

Source: WEF / IHS / FGE

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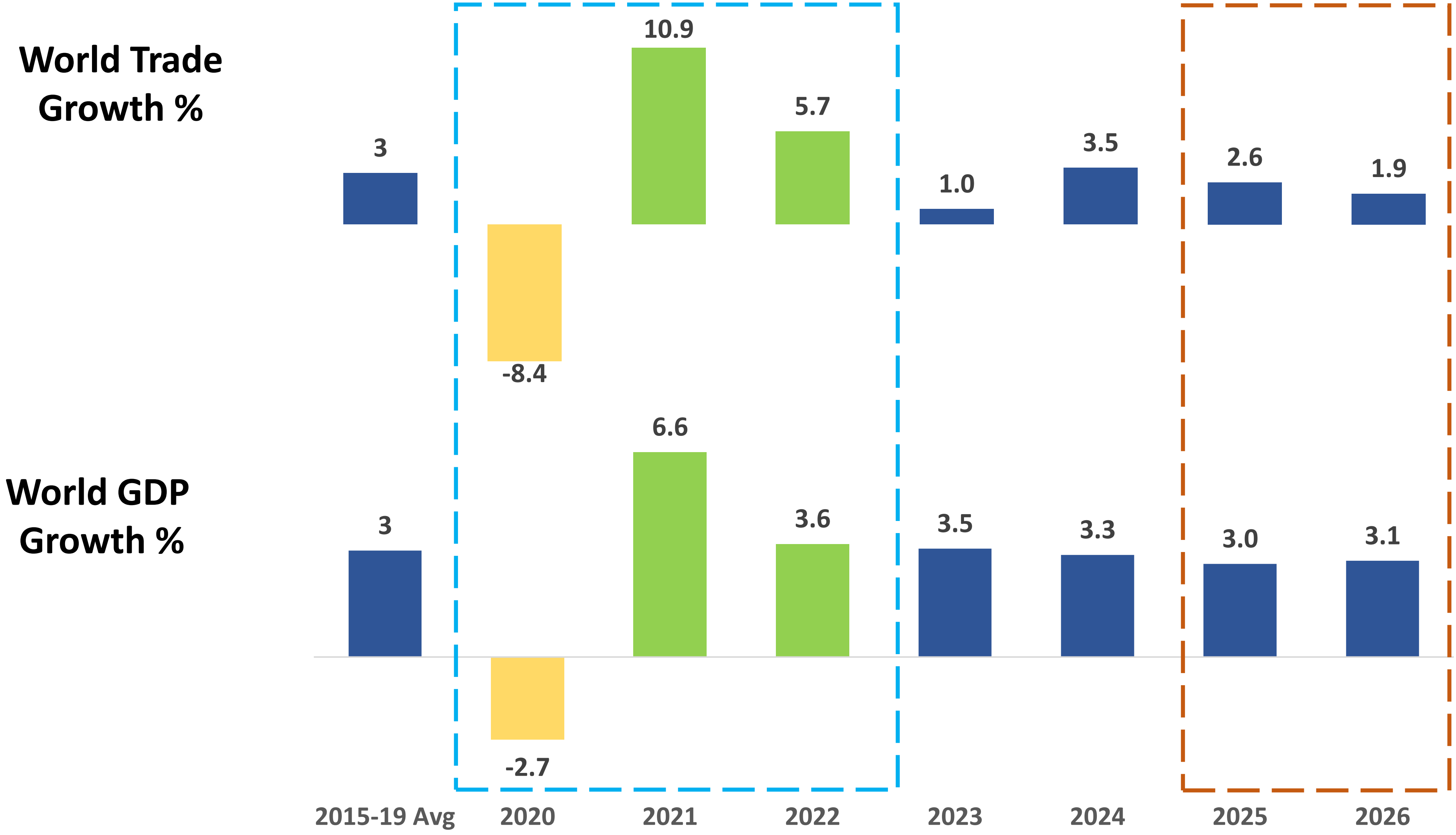
World GDP vs Trade



Tariff concerns hit global trade

Source: IMF

Indian Economic Strength

GDP Growth: India vs Key Economies

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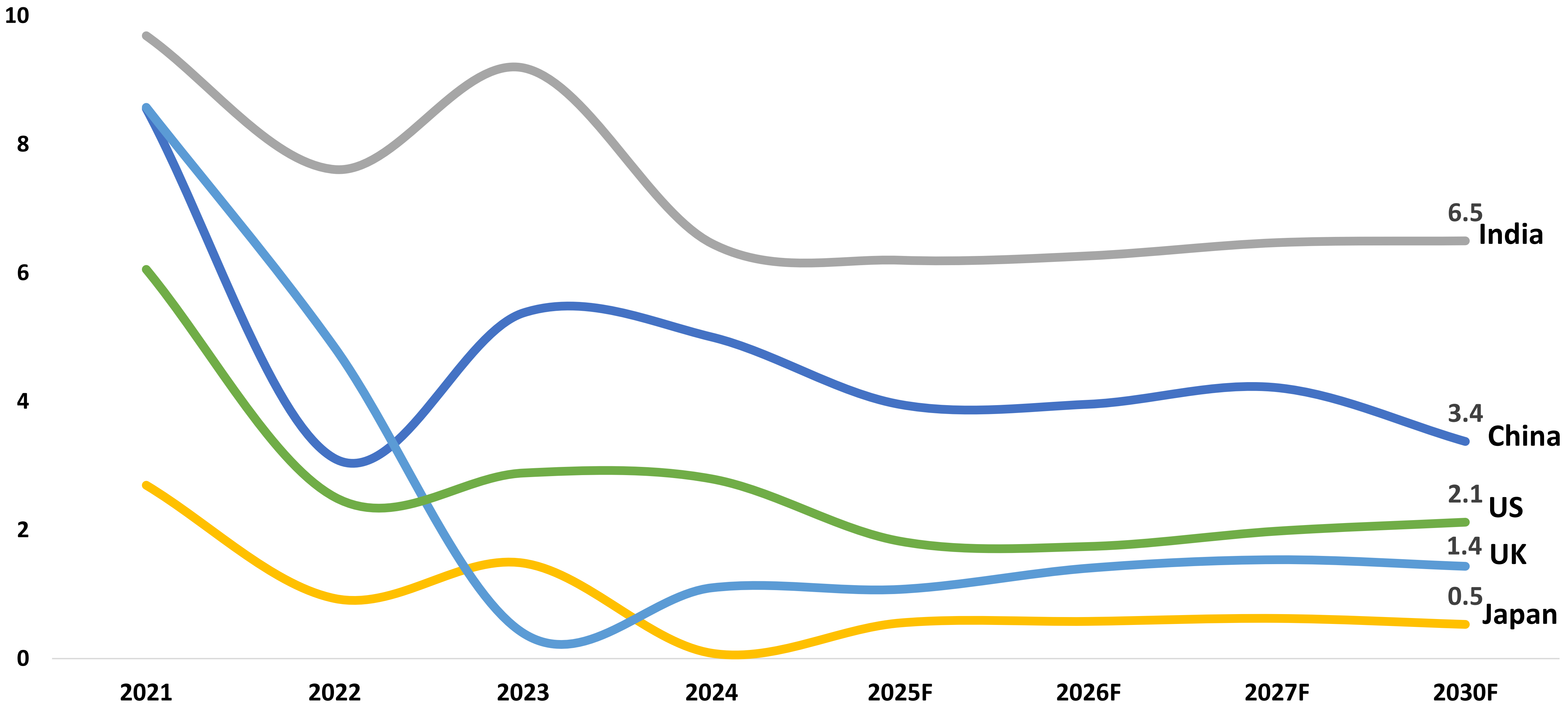

India's GDP poised for 6%+ growth signaling strong inherent resilience

Source: IMF

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Economic Landscape: Key Indicators

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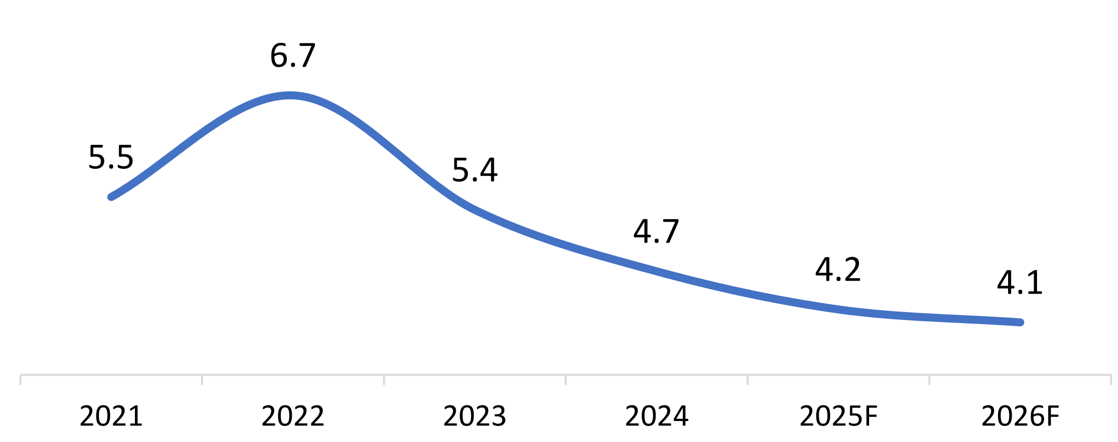
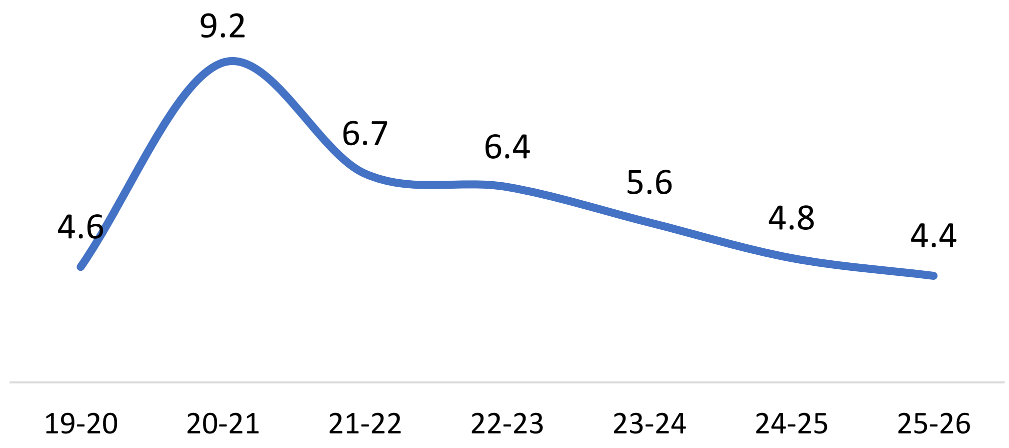
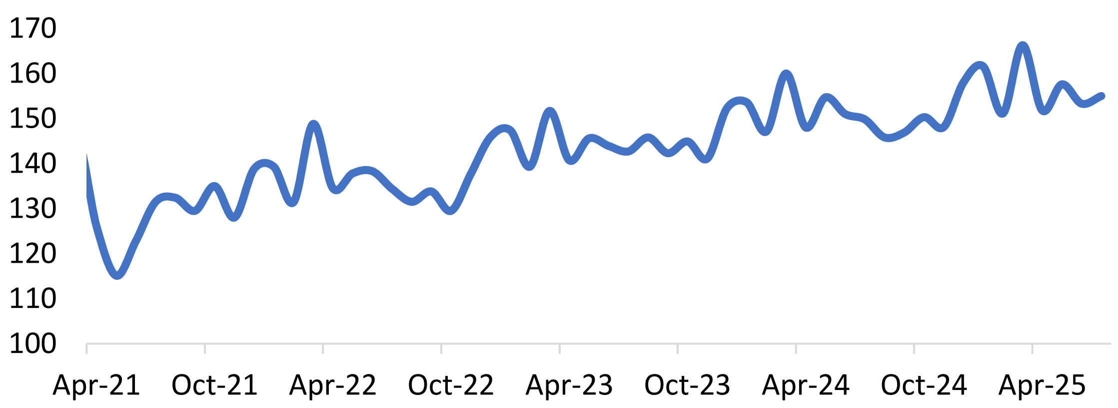
Inflation (%)



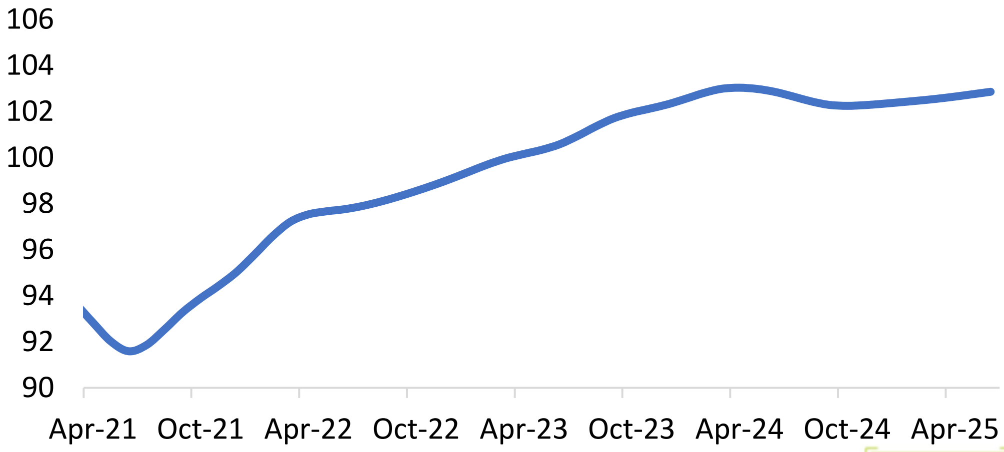
Fiscal Deficit (% of GDP)



Index of Industrial Production



Consumer Confidence Index



Strong factors point to a strong domestic growth supportive for consumption

Source: WEO

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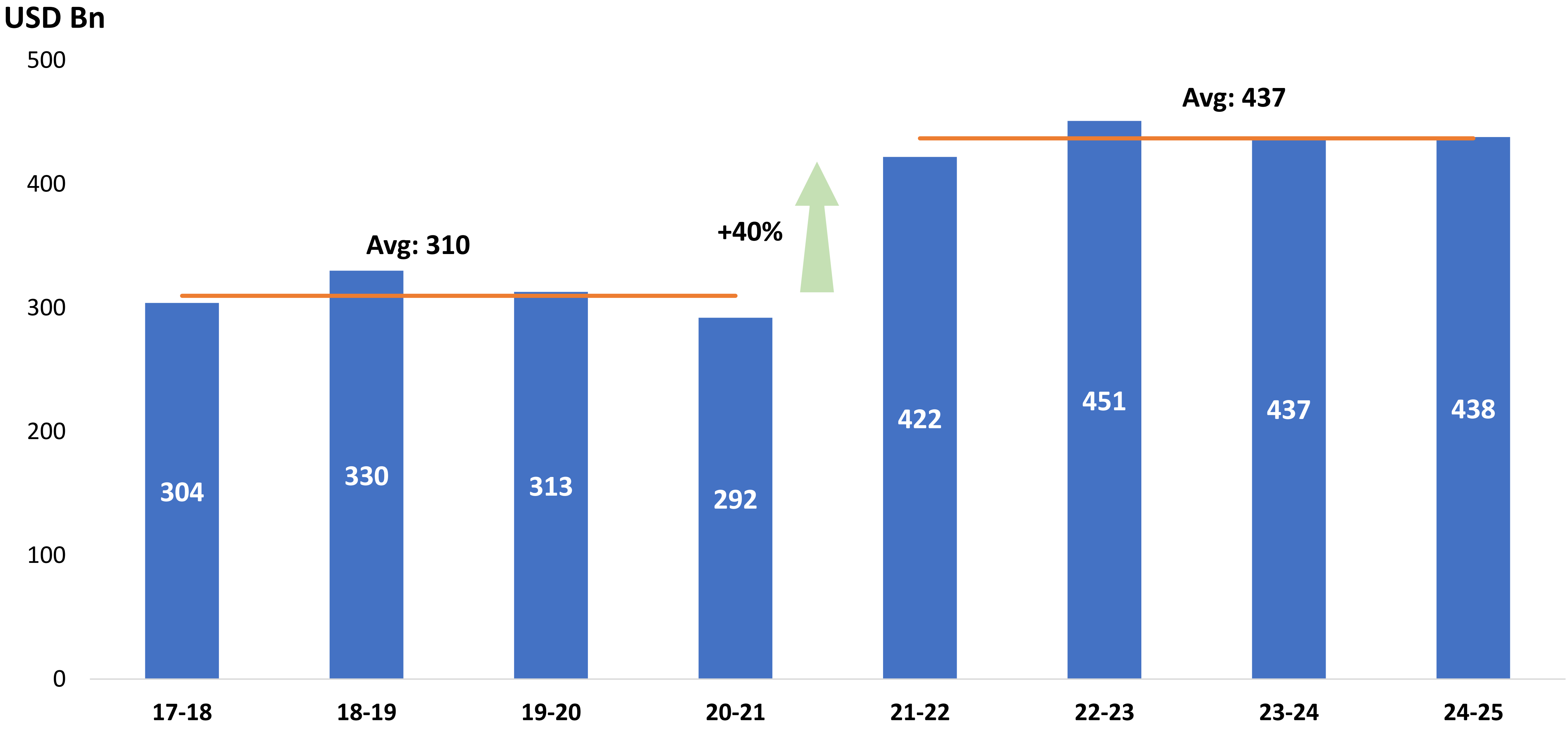
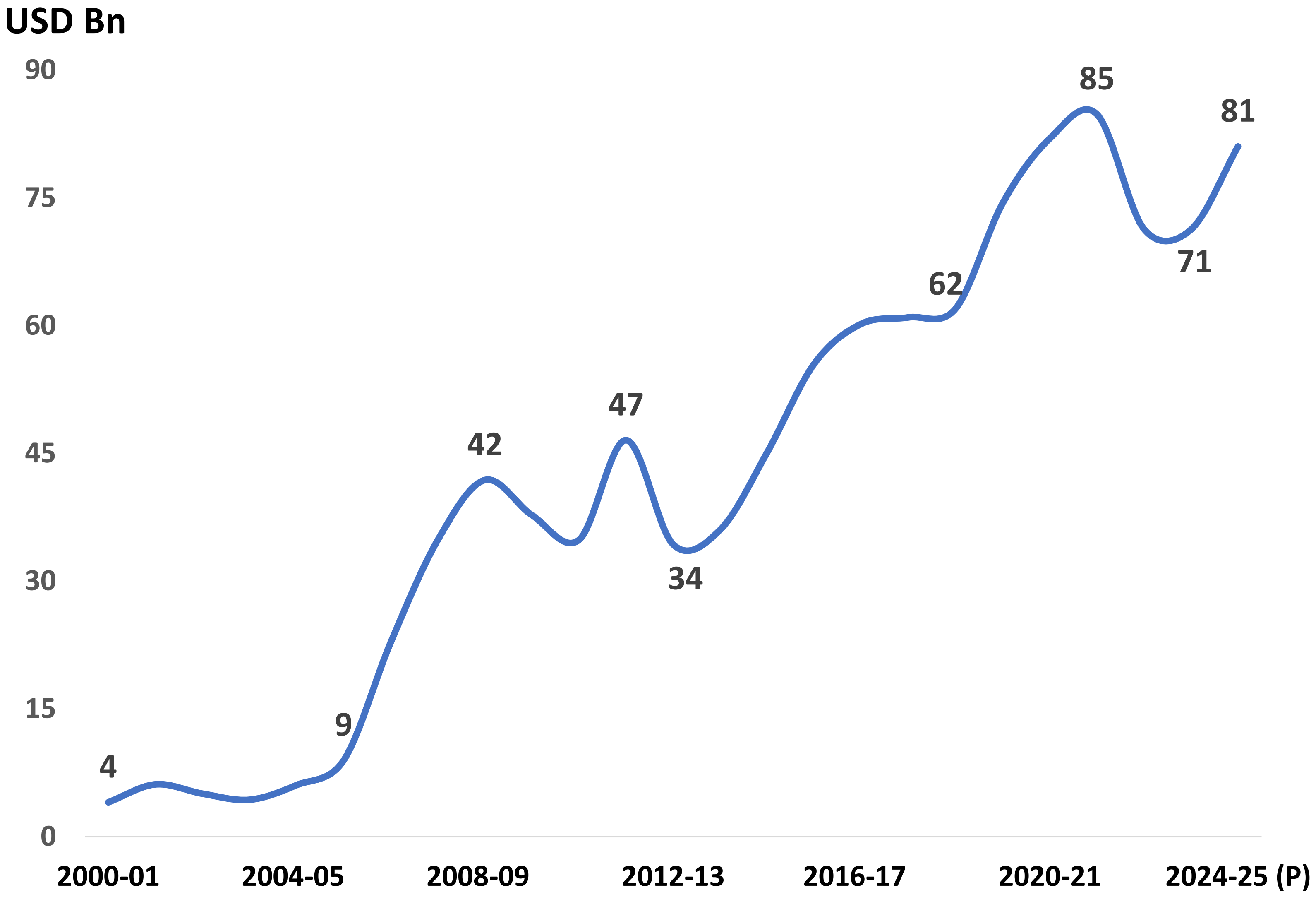
India Export Trend



India aims to achieve USD 1 trillion in merchandise exports by 2030

Source: UN Comtrade

FDI Growth



- ✓ **100% FDI allowed in most sectors** under automatic route (including textiles)
- ✓ **4th largest globally in greenfield project announcements**
- ✓ India has firmly established itself as the **third-largest startup ecosystem in the world.**

Above trends reaffirm India's position as a preferred global investment hub

Source: WEO

Demographic Dividend

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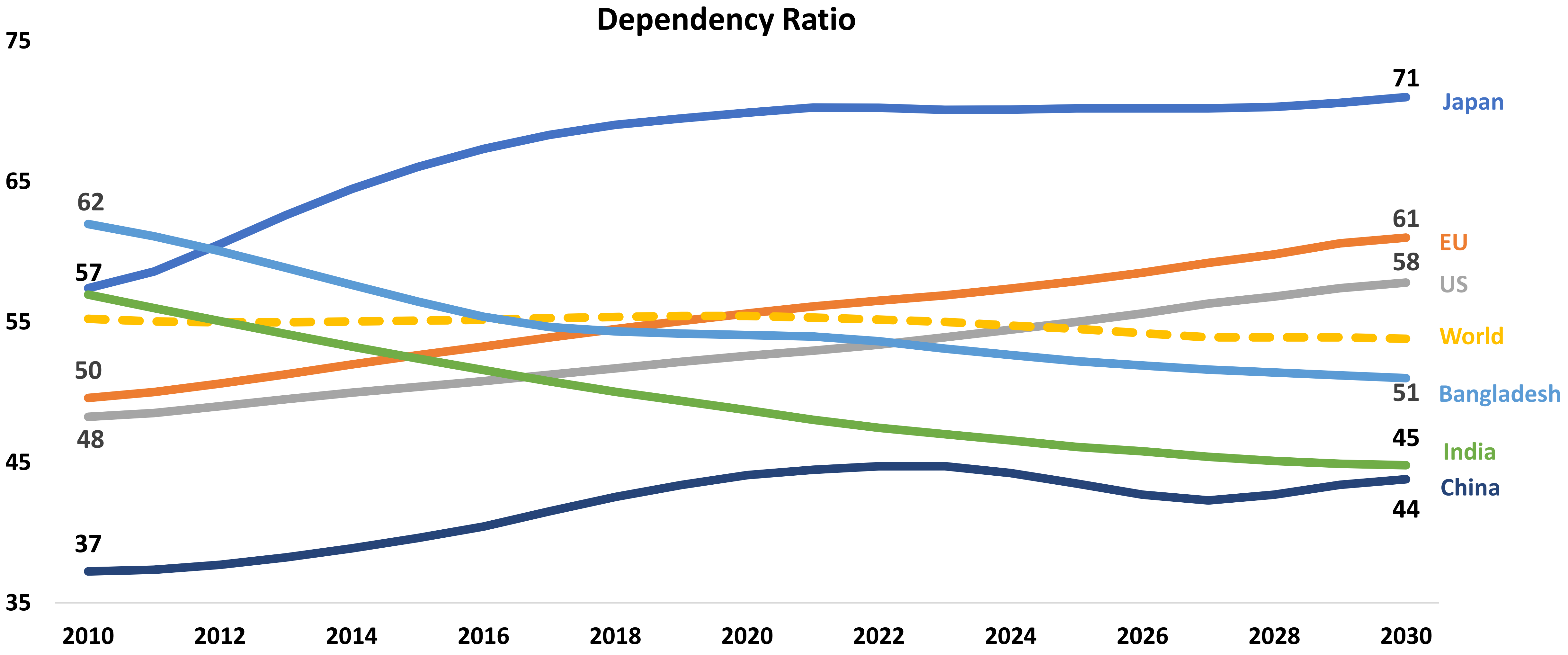

65% of India's population is < 35 years: Youngest workforce

Source: World Bank

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Working Population

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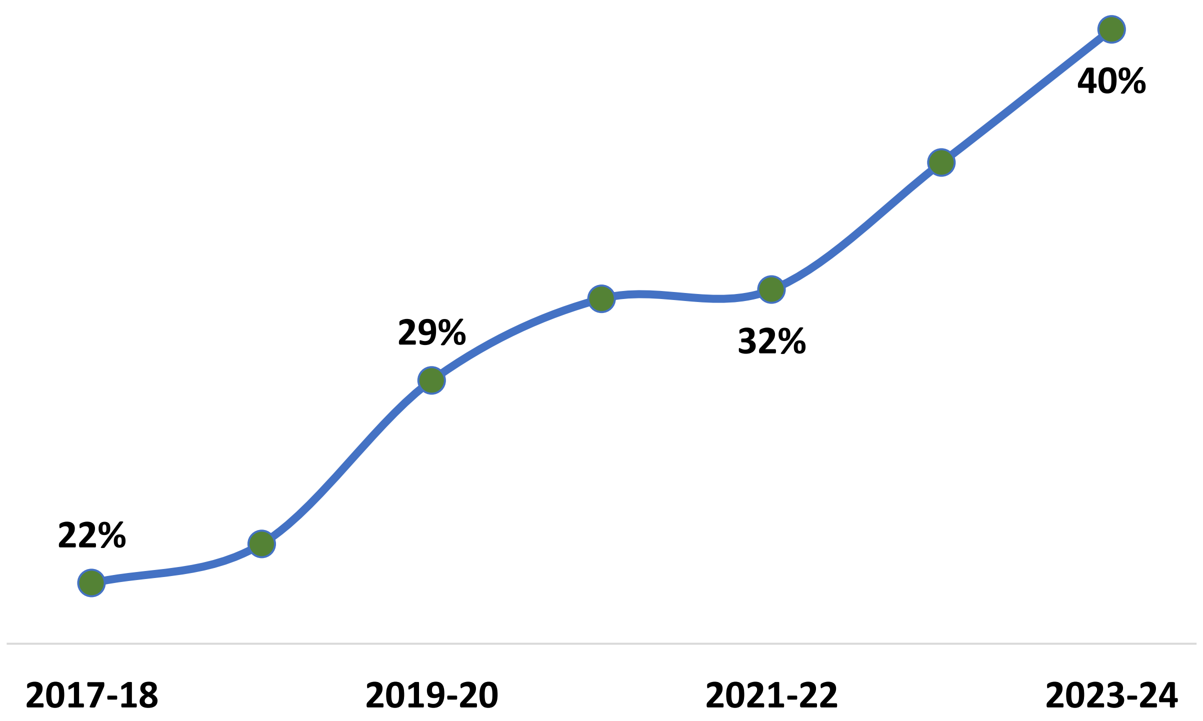
Growth in Working Population (Age 15-64)

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

Worker Population Ratio (Female)



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

Source: World Bank

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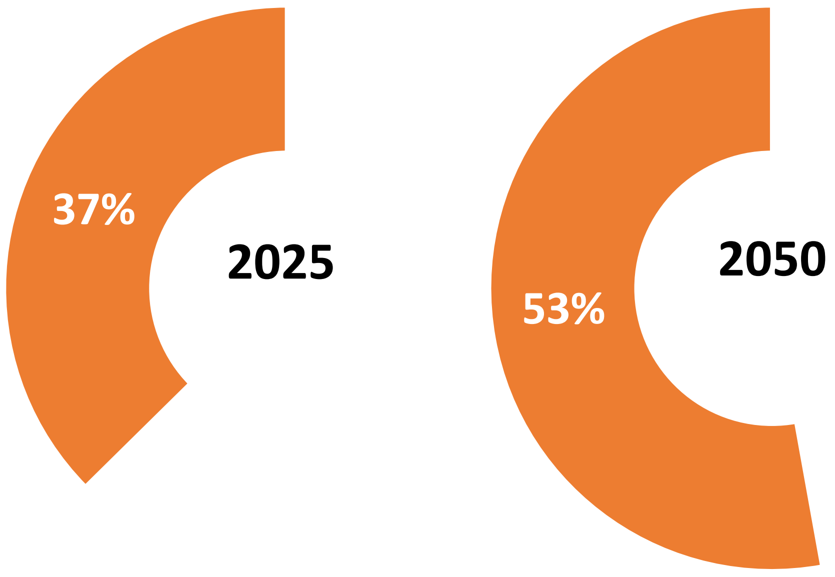
Urbanization

India Urbanisation (% of Population)



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

Government Push to Urbanisation

$1.5 Tr investment under National Infrastructure Pipeline

Smart City Mission

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

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

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

Source: World Bank

Catalyst for India economic growth

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Start-up Ecosystem

1,95,083 Startups in last 9 years

$354 Bn + valuation of ecosystem

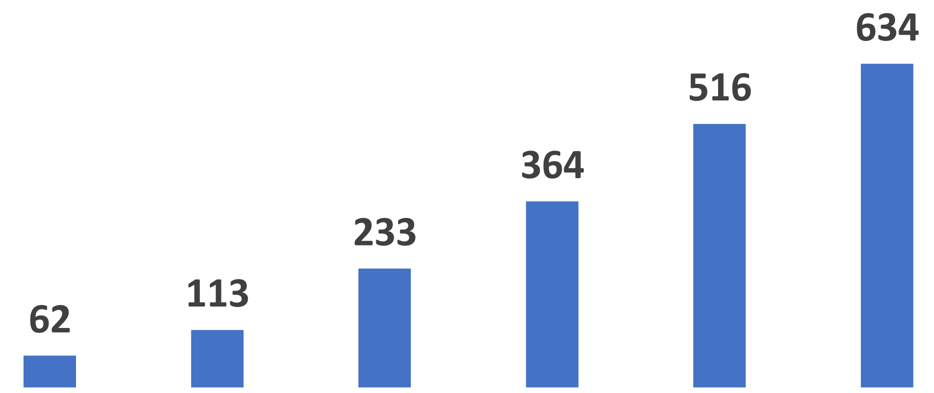
87,285 start-ups have atleast one woman director

116 Unicorn focus on innovation

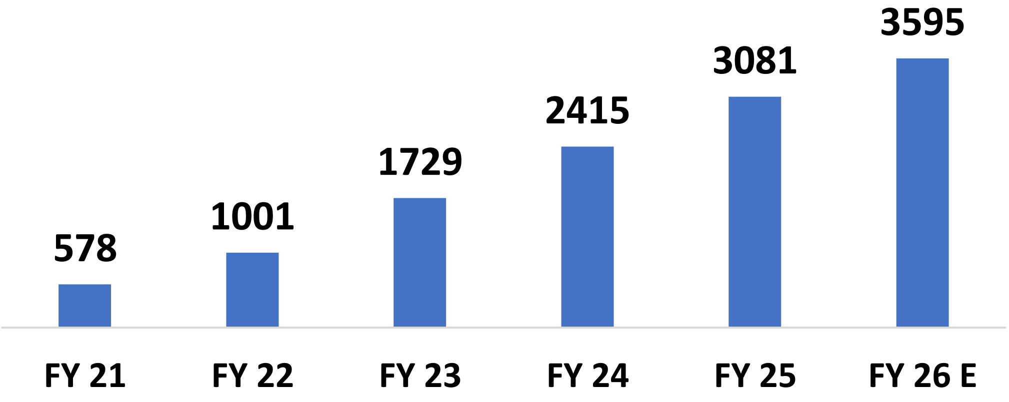
3rd largest in Global Unicorn Index (after US & China)

UPI Transactions

Average daily transactions (Mn)



Annual Value (USD Bn)



Thriving startups and rising UPI transactions showcase India's entrepreneurial strength

Source: UPI, DPIIT

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Indian Textile Industry

Textiles: Weaving India's Growth Story

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T&A Market Size		CAGR% (24-30)
Current: $184 Bn	**Target $350 Bn by 2030**	**11%**
Domestic 147	250	9%
Exports 37	100	18%

Fiber Supply		
Current: 13 MMT	**Projected: 20 MMT**	**7.5%**

- **2nd largest** employer (145 million employed); **15% of total working population**
- **Contributes ~12% to industrial production**
- Major driver for **SMEs & cluster-based growth**

Strong textile growth will bring inherent socio-economic growth in India

Source: MoT / Internal Analysis

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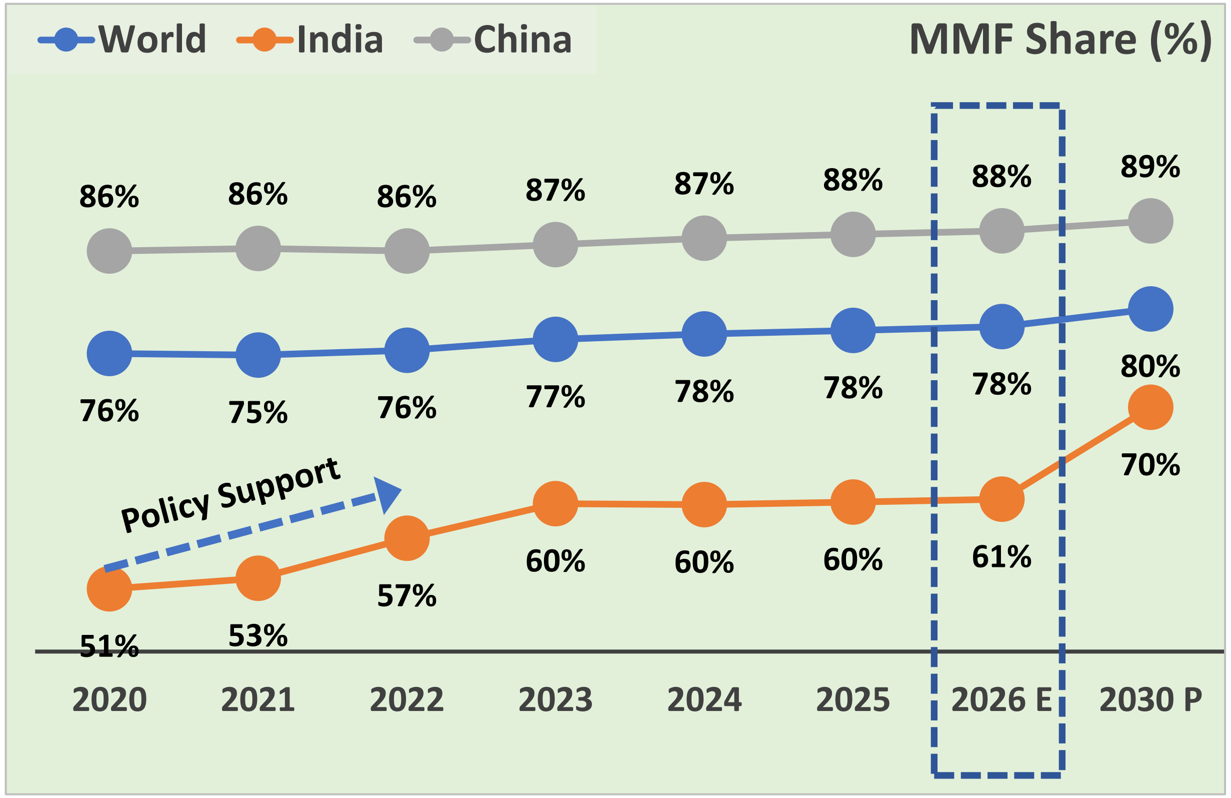
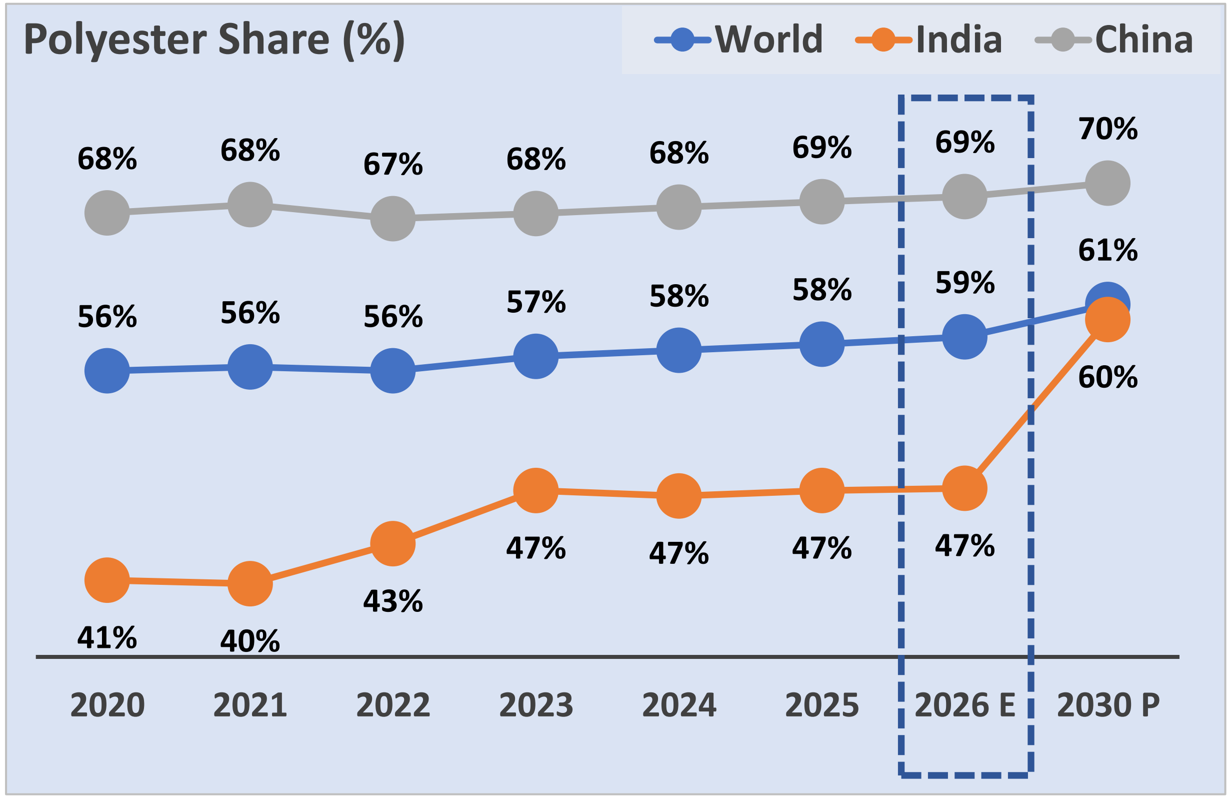
Investment in MMF Capacity





MMF Share (2026):
India at 61% ; China 88%, World 78%

Polyester Share (2026):
India at 47% ; China 69%, World 59%

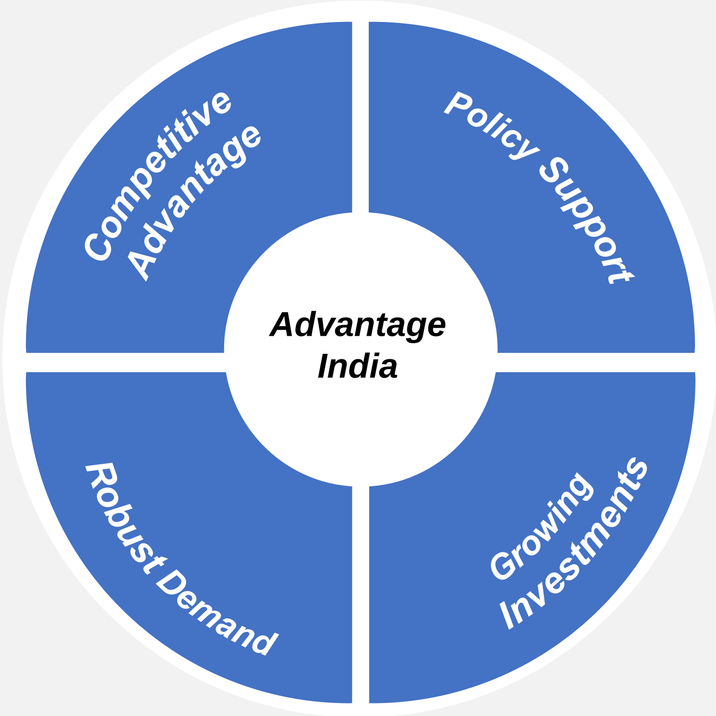
MMF led by Polyester to contribute to achieve $350 Bn target

Source: WM / Internal Analysis

Support for Indian Textile Industry

Policies by Indian Government

- **Raw Material**
- **Skilled Manpower**
- **Cost of Production**



- **Modernization (TUFS), Integration (SITP), Skill Development (SAMARTH)**
- **100% FDI (Auto-Route)**
- **Fibre Neutral GST**

- **India Textile & Apparel:** USD 350 Bn by 2030

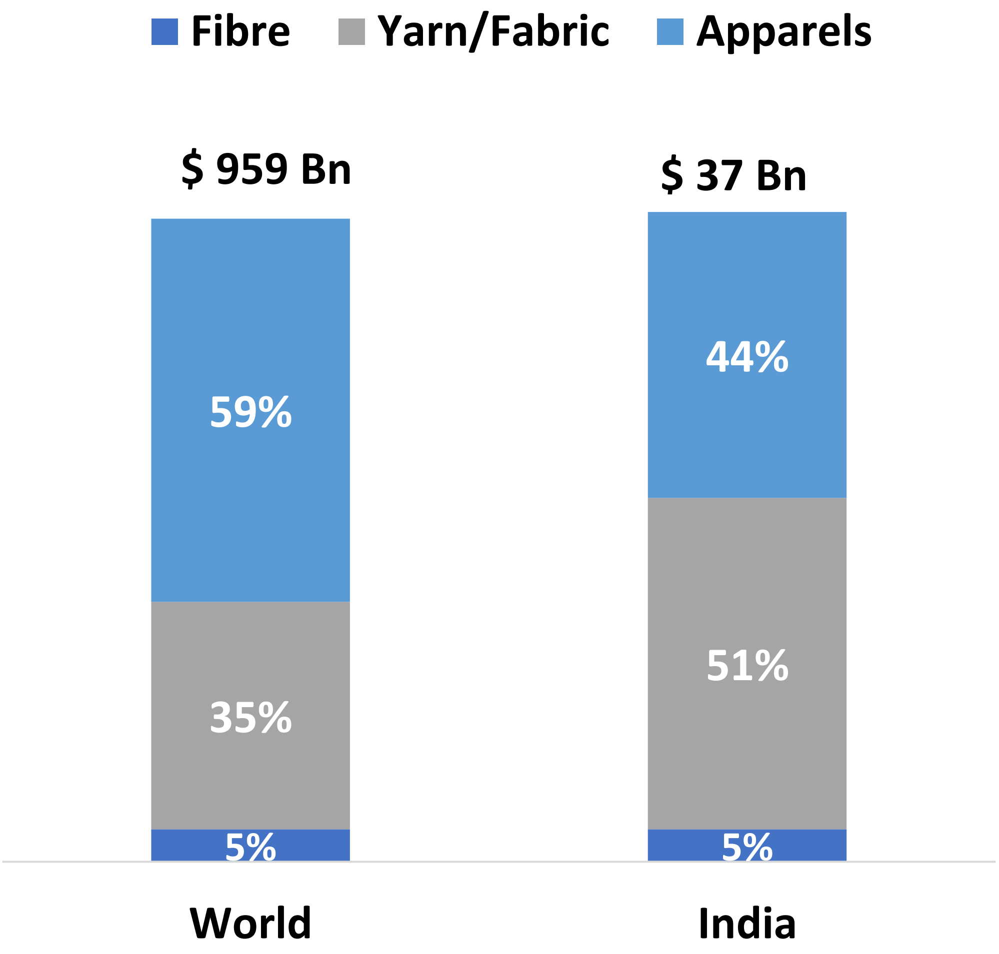
- **PLI Scheme**
- **MITRA: 7 Textile Parks**
- **National Technical Textile Mission**

74 companies have committed a total investment of ₹28,711 crore (approximately $3.3 billion USD) under the PLI scheme

Govt and industry working hand in hand towards a cohesive growth

Source: Ibef.org

T&A Exports: India vs World



Latest Estimates

Fibre	Yarn / Fabric	Apparels
2nd largest producer	**25%** of global spindles, **7%** High speed Looms	Scope of high value addition

Focus of Indian Producers

- Integrated Business Model
- Global Scale of Operations
- Advanced Technology
- Digitalization

India: The investment destination for value-added and downstream textile growth

Source: UN Comtrade / RIL analysis

Sustainability in Indian Polyester

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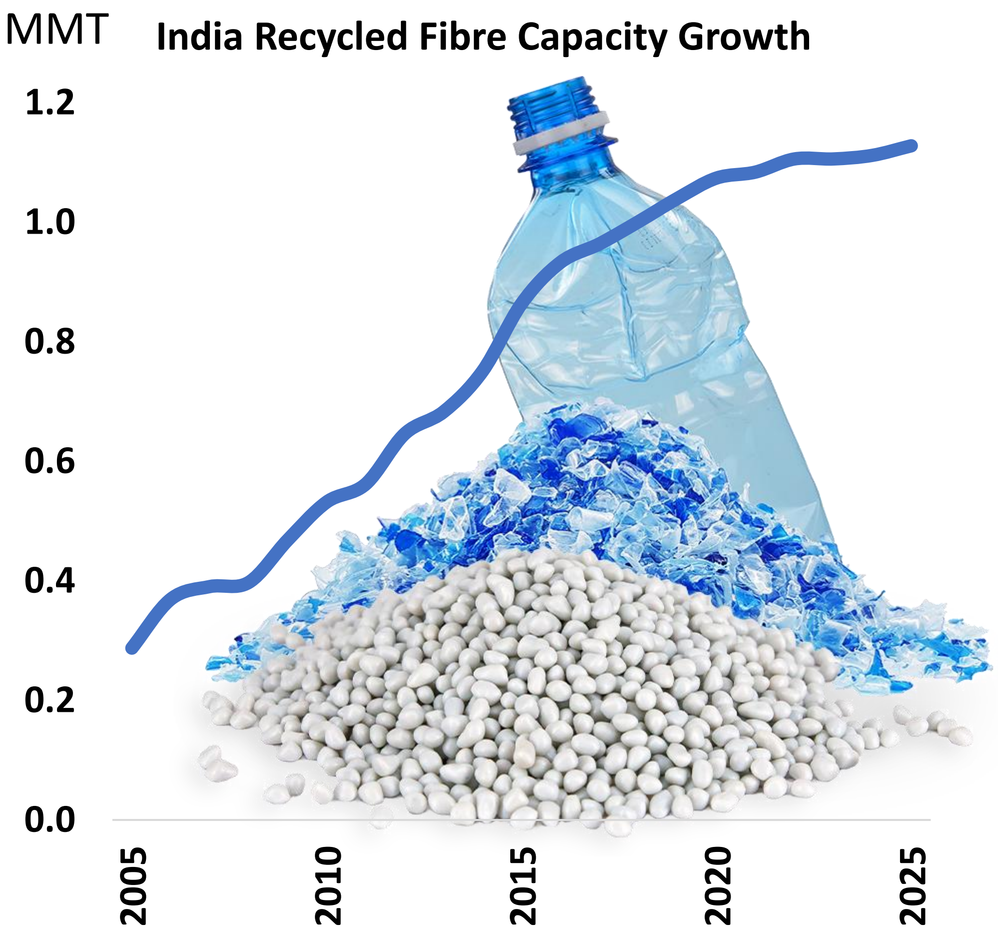
- ✓ 2nd largest producer of recycled fibre globally
- ✓ 90% PET bottles are recycled
- ✓ Over 40 bn bottles recycled annually



MMF industry: Significant contributor to keep our environment clean

Source: Wood Mackenzie

RIL: Reckoning Strength

RIL – India's Most Trusted, Most Valuable Company

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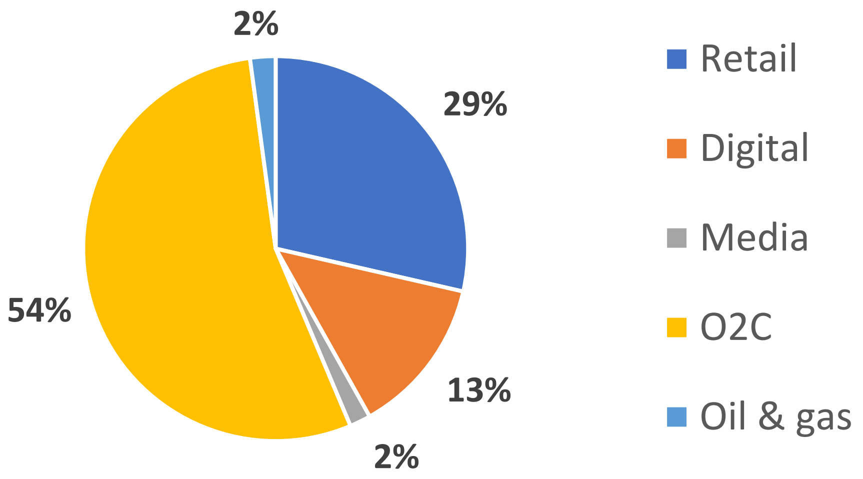
Ranked 88 among Fortune 500 Companies

- $ 202 Bn Market Capitalization
- **$ 125 Bn Revenue**
- $ 21.5 Bn EBITDA

For FY ending March 31, 2025

Segment wise Revenue Share



Fuels

Polymers

Elastomers

Intermediates & Polyesters

Net carbon zero target by 2035

Source: RIL Analysis

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RIL New Growth Engines

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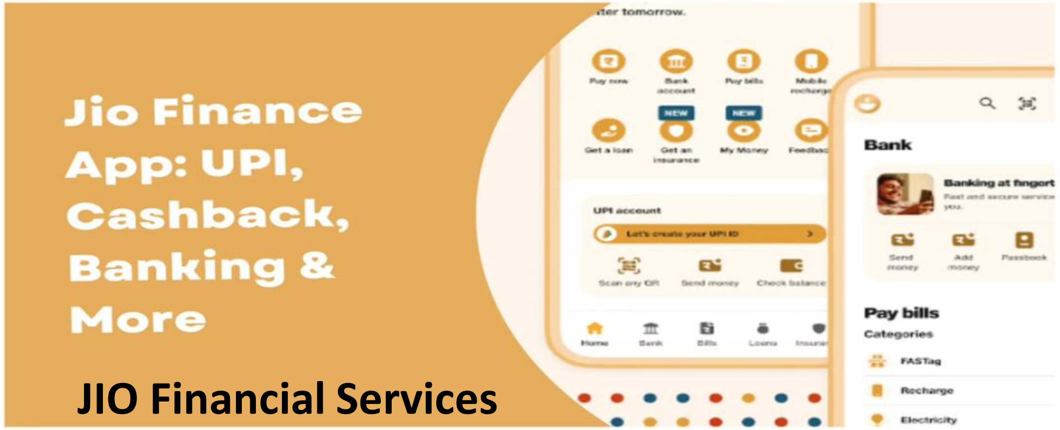
AI Joint Venture with Meta and Google



JIO Financial Services

Building Giga Factories in Jamnagar

Solar PV Modules

Advanced Batteries

Green Hydrogen

Bio Gas

Reliance Retail Ventures

Media & Entertainment

RIL new growth engines expected to drive next wave of growth

Source: RIL Analysis

RIL Position In India

Contributing to 7.6% of India's total merchandise exports	Largest contributor to the National Exchequer	Highest CSR spending in the Indian corporate sector	Playing a significant role in India's climate transition goals	R&D spend to facilitate innovation globally
> USD 33 billion	> USD 24 billion	USD 252 million	Net Carbon Zero by 2035	~USD 490 million

Maintained leadership position among Indian corporates for nearly three decades

Source: RIL Analysis

Recycling @ Reliance: Enabling Green Packaging

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relpet green

1. Developed eco-system for bottle collection: 160 vendors
2. Installed 100+ RVMs across India in last 18 months
3. Investments
   i. New 30 KTA integrated rPSF in 2025 in addition to existing 25 KTA
   ii. 27 KTA rPET plant fully integrated with Washline by 2026
   iii. Additionally multiple rPET lines are planned post 2026
4. RIL currently recycles 3 bn bottles/annum to fibre, which will increase to 10 bn bottles/annum by 2025 end
5. RIL is actively collaborating with brands to meet their sustainability commitments

Reliance is ready to meet rapidly growing rPET demand

Source: RIL Analysis

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Fibre Sustainability Initiatives

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Lakme Fashion Week

Tie-ups with **14 renowned fashion designers**

New hi-fashion **apparel collection** of **40~45 designs** every season **promoting new applications**

Using **4 Fashion Influencers** every season to uniquely **promote** the **eco-collections**

Extensive outreach through **R|Elan™ Social Media** handles~ **500 million+** consumers so far

A **new designer** #EarthTee release every World Environment Day; **7th Season**

Making Sustainable Fashions aspirational for consumers

R|Elan™ Circular Design Challenge

In **partnership with the UN**, fostering a **greener, sustainable future**

A global activation empowering **young fashion designers** to showcase **circular innovations**; **1200+ participants** so far

Promotes **sustainable practices**, **reduces waste** in the **fashion and textile value chain**

Annual Prize, **tailored mentorship** and strategic market access to incentivize the winner

6 finalists from India, UK, EU and Argentina to present at Season 7 finale in Oct 2025, Delhi.

India's biggest Sustainability Award for the World

R|Elan™ B2B & B2C initiatives to increase Sustainability awareness

Source: RIL Analysis

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Global Connect to Make India a Preferred Sourcing Hub

- Showcased innovative solution to 150+ Global & Domestic Brands
- 200 Mn+ garments with R|Elan™ fabric in FY24-25
- 50+ Hub Excellence Program (HEP) Mill Partners
- 10 Mn Hangtags to promote MMF sourcing from India

Source: RIL Analysis

Expansion Project: Specialty Polyester

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RIL 1 MMTPA expansion project for Specialized Polyester Products by 2026-27

A world-class, world-scale project, catering to high-growth consumer and downstream segments:

- **Activewear**
- **Denims**
- **Home Textiles**
- **Athleisure**
- **Hygiene**
- **Technical Textiles**

Backward integration with **3 MMTPA PTA facility planned** with:

- Best upstream and downstream integration, securing downcycle risk
- State-of-the-art complex and best support infrastructure

Project Updates

- Plant layouts finalized; Comprehensive evaluation of product and technical design concluded
- **Next steps:**
  - ✓ Placing orders for capex equipment (focus on long lead time items)
  - ✓ Statutory approvals from relevant authorities
  - ✓ Land development, road infrastructure, power connections

New capacities to lay a strong foundation for future growth

Source: RIL Analysis

Summary

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- Indian economy continues to post steady growth, supported by strong policy reforms in manufacturing
- Indian textile industry poised for growth driven by rising consumption
- Textile investment in India is driven by value addition and downstream expansion, making it a preferred global destination
- Reliance is strongly aligned with India's growth vision through value creation, sustainable innovation, and global partnerships

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This Presentation was done at India Networking event
Organised by India ITME Society on 29th Cot 2025 in Singapore

THANK YOU