

SHIVPRIYA TEXCHEM · KNOWLEDGE SERIES

Bhilwara. The suiting capital.

Bhilwara does one thing at scale: polyester-viscose suiting, from spinning through weaving to processing, inside one district. It is India's most vertically integrated synthetic fabric cluster — and it sits in one of the country's driest regions.

PV suiting

the blend the entire district is built around

Integrated

spinning, weaving and processing within
single groups

Water

the constraint that shapes every expansion
decision



Bhilwara · Photograph: Maywe46 — CC0, via Wikimedia Commons. Reproduced under its licence terms.

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CHAPTER 01

What Bhilwara makes

Bhilwara is a synthetic blend cluster. Polyester-viscose suiting is the core product, supported by shirting, uniform fabric and a growing denim and technical presence.

SEGMENT	NOTES
PV suiting	The signature product — polyester-viscose blended suiting for the domestic market
Uniform fabric	School, corporate and institutional uniform cloth at large volume
Shirting	Blended and polyester shirting alongside the suiting base
Spinning	Synthetic and blended yarn, largely captive to local weaving
Processing	Dyeing and finishing capacity integrated within the major groups
Denim & technical	Diversification into denim and industrial fabric

Why PV and not cotton. Rajasthan is not a cotton state and water is scarce. **Polyester-viscose suits both constraints** — the raw material is bought in rather than grown, and synthetic processing uses less water than cotton preparation and reactive dyeing.

CHAPTER 02

Integration as the model

Unlike the powerloom clusters, Bhilwara is dominated by integrated groups that spin, weave and process under common ownership. That produces a different commercial character entirely.



Several Bhilwara groups run this whole chain internally

01 Fewer, larger counterparties

You deal with an integrated manufacturer rather than a chain of job-work units.

02 Quality control is internal

A single group controls yarn, fabric and finish, which makes consistency easier to achieve.

03 Minimum quantities are higher

Integrated lines are built for volume and do not suit very small lots.

04 Brand supply is common

Many groups supply national suiting brands directly under long-running arrangements.

05 Job work exists alongside

A smaller decentralised weaving base supports the large groups.

Where Surat is a network and Bhiwandi is a marketplace, Bhilwara is a set of **companies**. That changes how you buy from it.

CHAPTER 03

Leading names across the cluster

Bhilwara has a small number of nationally recognised integrated groups, which is unusual for an Indian textile cluster.

INTEGRATED SUITING

Spinning to finished fabric.

- 01 **RSWM Limited (LNJ Bhilwara)**
Major integrated yarn and fabric group
- 02 **Sangam India**
Integrated PV yarn, fabric and denim
- 03 **BSL Limited**
Suiting and worsted fabric manufacture
- 04 **Nitin Spinners**
Cotton yarn and fabric, Bhilwara base
- 05 **Mayur Suitings**
Established suiting fabric brand

SPINNING

Synthetic and blended yarn.

- 01 **RSWM Limited**
Large synthetic and blended yarn capacity
- 02 **Nitin Spinners**
Cotton and blended yarn for domestic and export
- 03 **Sangam India**
PV and cotton yarn alongside its fabric business
- 04 **Shree Rajasthan Syntex**
Synthetic yarn manufacture
- 05 **Jaipur belt spinners**
Regional yarn supply into the cluster

WEAVING

Suiting and shirting fabric.

- 01 **Sangam India**
Large integrated weaving capacity
- 02 **BSL Limited**
Worsted and blended suiting weaving
- 03 **Mayur Suitings**
Suiting fabric weaving and branding
- 04 **Independent weaving units**
Decentralised base supporting the groups
- 05 **Uniform fabric weavers**
Institutional and school uniform cloth

PROCESSING

Dyeing and finishing.

- 01 **Group-integrated processing**
In-house dyeing within the major groups
- 02 **Independent processors**
Job-work processing for smaller weavers
- 03 **Finishing specialists**
Suiting finish and handle development
- 04 **CETP operators**
Common effluent infrastructure for the cluster
- 05 **Testing laboratories**
Quality verification for brand supply

CHAPTER 04

What makes PV suiting work

Polyester-viscose is a deliberately engineered blend. The two fibres compensate for each other in ways that neither achieves alone, which is why the blend dominates Indian suiting.

PROPERTY	FROM POLYESTER	FROM VISCOSE
Strength	High tenacity and durability	Low, especially when wet
Drape	Stiff on its own	Excellent drape and fall
Wrinkle recovery	Very good	Poor
Moisture	Poor absorbency	Good absorbency and comfort
Cost	Lower and more stable	Higher and pulp-price linked
Dyeing	Disperse dyes, high temperature	Reactive or direct dyes

The dyeing penalty. A PV fabric must be dyed **twice** — disperse for the polyester and a separate class for the viscose. Two baths, two temperatures, two chances for a shade error. This is why PV processing expertise is a genuine competitive asset.

CHAPTER 05

The constraint that defines the district

Bhilwara sits in a water-scarce region and runs a water-intensive industry. Every capacity decision in the cluster is made against that background.



Bhilwara, Rajasthan · Photograph: Maywe46 — CC0, via Wikimedia Commons

- **Groundwater depletion** has been a long-running issue across the district.
- **Effluent norms** have driven substantial investment in treatment and recycling.
- **Zero liquid discharge** is increasingly the operating standard for processing capacity.
- **Synthetic advantage** — PV processing uses less water than cotton, which is part of why the cluster specialised this way.

CHAPTER 06

What limits the cluster

Bhilwara's constraints are those of a specialised, capital-intensive cluster serving a mature domestic market.

- **Water.** The hardest limit, and it is structural rather than cyclical.
- **Domestic concentration.** Heavy dependence on the Indian suiting market rather than export.
- **Changing dress norms.** Formal suiting demand is under long-term pressure from casualisation.
- **Raw material exposure.** Both polyester and viscose prices are set outside the district.
- **Distance from ports.** Inland location adds cost for any export ambition.
- **Competition.** Surat and the Gujarat belt compete on man-made fabric cost.

CHAPTER 07

What is shifting

The cluster is diversifying away from pure formal suiting — into denim, technical fabric, export and more casual constructions.

SHIFT	WHAT IS HAPPENING
Denim capacity	Significant denim investment by the major groups as a diversification
Casual fabric	Movement toward more relaxed constructions as formal suiting demand softens
Export	Effort to build export share in yarn and fabric beyond the domestic market
Technical textiles	Industrial and functional fabric as a higher-margin adjacency
Recycled fibre	Recycled polyester content, driven by buyer and regulatory pressure
Water recycling	Continued heavy investment in treatment and reuse

CHAPTER 08

Buying from Bhilwara

Bhilwara is straightforward to buy from — you are dealing with companies rather than a market — provided your volumes and blend requirements fit.

01 Specify the blend ratio

65:35 and 50:50 PV are different fabrics with different handles and costs. State it.

03 Ask about the dyeing route

Two-bath PV dyeing is where shade problems arise. Understand the processor's method.

05 Check pilling performance

PV suiting pills. Get a tested grade on the actual construction.

02 Confirm minimum quantities

Integrated lines have real minimums. Establish this before developing a quality.

04 Set shade continuity terms

For repeat programmes, agree lot-to-lot shade tolerance explicitly.

06 Verify the finish

Suiting handle is created in finishing. Approve the finished fabric, not the greige.

How Shivpriya reads it. Bhilwara is where we go for **integrated PV yarn and suiting fabric with consistent quality**. The integration is the advantage — one group controlling yarn through finish delivers repeatability that a job-work chain struggles to match.

IN CLOSING

One blend. One district.

Bhilwara is India's most integrated synthetic fabric cluster and the centre of the PV suiting trade. If you are sourcing blended suiting or uniform fabric, talk to us — start with the blend ratio and the dyeing route, because that is where PV programmes succeed or fail.

TALK TO US

Shivpriya Texchem Pvt. Ltd.
Mumbai, Maharashtra, India

ENQUIRIES

info@shivpriyatexchem.com
+91 87672 50274

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