

SHIVPRIYA TEXCHEM · KNOWLEDGE SERIES

Tirupur. The knitwear export machine.

Knitting, dyeing, printing and garmenting inside a few kilometres, shipping the large majority of India's cotton knitwear exports. Tirupur is also the cluster that was shut down by a court over effluent and rebuilt itself around zero liquid discharge.

~90%

of India's cotton knitwear exports originate here

~₹40,000 cr

approximate knitwear export value, FY 2024-25

ZLD

zero liquid discharge — mandatory since the 2011 shutdown



Tirupur · Photograph: PJeganathan — CC BY-SA 4.0, via Wikimedia Commons. Reproduced under its licence terms.

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CHAPTER 01

Everything within a few kilometres

Tirupur's advantage is compression. A garment can be knitted, dyed, printed, cut, stitched, checked and packed within a very small radius, often within days.



Each stage is a separate specialist business, all within the same town

SEGMENT	WHAT IT COVERS
Knitting	Circular knitting units producing jersey, rib, interlock and fleece
Dyeing & processing	ZLD-compliant dye houses — the most regulated part of the cluster
Printing & embellishment	Screen, rotary and digital printing, plus embroidery and applique
Garmenting	From very large vertically integrated exporters to small job-work stitching units
Accessories & trims	Labels, tapes, buttons and packaging, all locally available
Compliance & testing	Laboratories and audit services built up around export requirements

Why compression matters. A buyer changing a colour or a print two weeks before shipment can be accommodated because **every stage is within driving distance**. That responsiveness, rather than cost, is Tirupur's real competitive advantage today.

CHAPTER 02

The shutdown that changed everything

In 2011 the Madras High Court ordered Tirupur's dyeing units closed over discharge into the Noyyal river. The cluster reopened only on zero liquid discharge terms, and that transition defines it today.

01 The problem

Salt-laden dyeing effluent had contaminated the Noyyal river and the agricultural land around it.

03 The condition

Reopening required zero liquid discharge — recovering and reusing water and salt.

05 The consolidation

Processing consolidated into fewer, larger, compliant units, often on a common-facility model.

02 The order

Dyeing units were closed. A very large part of the cluster's processing capacity stopped.

04 The cost

ZLD plants are expensive to build and expensive to run. Many small units could not afford it.

06 The outcome

A higher processing cost base — and an environmental credential that export buyers now value.

Tirupur paid for its environmental compliance before its customers asked for it. **That turned out to be an asset.**

CHAPTER 03

Leading names across the cluster

Tirupur has both very large integrated exporters and thousands of small specialist units. These are recognised names in each segment.

INTEGRATED EXPORTERS

Spinning through garment under one group.

- 01 **KPR Mill**
Spinning, knitting, processing and garmenting at scale
- 02 **Eastman Exports**
Among the largest vertically integrated exporters here
- 03 **SCM Garments**
Large garment exporter, Tirupur
- 04 **Best Corporation**
Infantwear and kidswear specialist
- 05 **S.P. Apparels**
Kids and infant garment specialist

KNITWEAR MANUFACTURERS

Knitting and garment manufacture.

- 01 **Poppys Knitwear**
Established Tirupur knitwear manufacturer
- 02 **Armstrong Knitting Mills**
Knitted garments for export
- 03 **Goodwill Apparels**
Knitwear manufacture and export
- 04 **Atlas Textiles**
Knitted fabric and garments
- 05 **CBC Fashions**
Knitwear manufacture and export

PROCESSING & DYEING

ZLD-compliant dye houses.

- 01 **Ramraj Group**
Processing alongside its own branded apparel
- 02 **Jaya Processors**
Knitted fabric dyeing and processing
- 03 **Velmurugan Processors**
Dyeing and finishing of knits
- 04 **Sri Kannapiran Mills**
Spinning and processing operations
- 05 **Common ETP societies**
Shared ZLD facilities serving member units

YARN SUPPLY

Feeding the knitting base.

- 01 **KPR Mill**
Large captive and merchant yarn capacity
- 02 **Sri Kannapiran Mills**
Cotton yarn for the knitting cluster
- 03 **Premier Mills**
Cotton and blended yarn, Coimbatore belt
- 04 **Super Spinning Mills**
Established Tamil Nadu spinning group
- 05 **Sambandam Spinning**
Yarn supply into the knitting cluster

CHAPTER 04

How the trade is organised

Tirupur runs on a hybrid model — a few large integrated exporters holding buyer relationships, supported by a very deep base of small job-work specialists.

01 Exporters hold the buyer

The relationship with the international brand sits with the exporter, who carries the order risk.

02 Work is subcontracted

Knitting, dyeing, printing and often stitching are pushed out to specialist units on job work.

03 Compliance is centralised

The exporter is audited and must extend that compliance to its subcontractors.

04 Small units survive on flexibility

A small stitching unit takes work no large factory would accept, and turns it fast.

05 Domestic brands run alongside

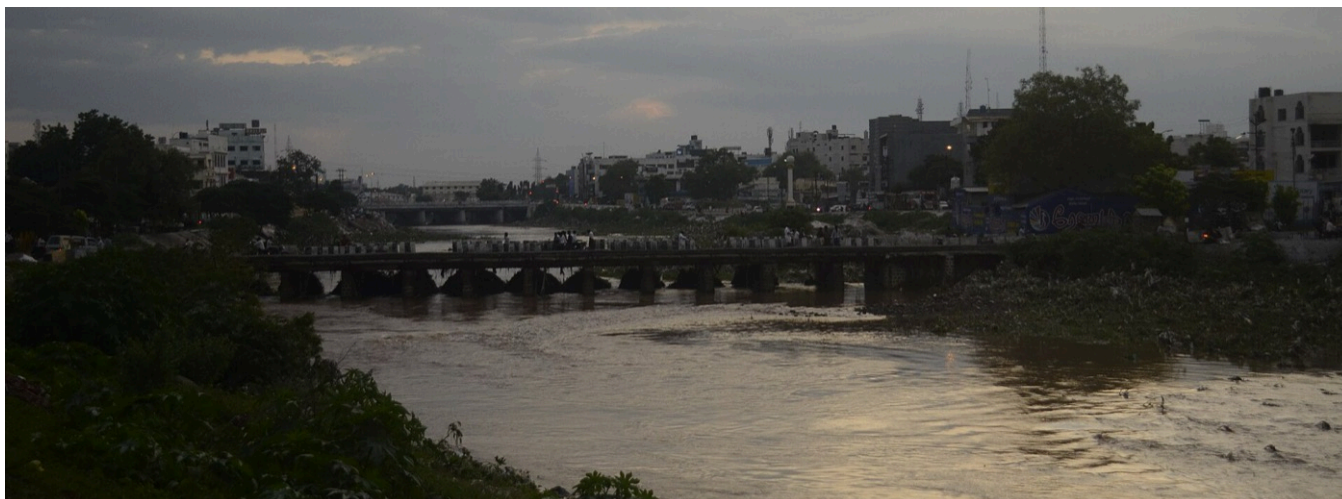
A substantial domestic innerwear and casualwear business operates in parallel to export.

The subcontracting risk. The compliance burden sits with the exporter, but much of the work happens in units the buyer never audits. **Traceability through the subcontracting chain** is the cluster's most persistent commercial vulnerability.

CHAPTER 05

What Tirupur costs and why

Tirupur is not the cheapest place in the world to make a T-shirt. It competes on responsiveness, integration and compliance rather than on labour rate.



Tiruppur, Tamil Nadu · Photograph: PJeganathan — CC BY-SA 4.0, via Wikimedia Commons

Labour

Higher than Bangladesh, with persistent skilled-operator shortages and migrant dependence.

Processing

ZLD makes dyeing structurally more expensive than in less regulated clusters.

Power

A significant cost line; captive and renewable generation is widespread.

Duty access

Preferential access under trade agreements materially affects competitiveness by market.

CHAPTER 06

What is shifting

Tirupur's current agenda is moving up in product value, broadening beyond cotton basics, and reducing its dependence on a small number of export markets.

SHIFT	WHAT IS HAPPENING
Beyond cotton basics	Blends, man-made fibre knits and activewear as cotton T-shirts commoditise
Sustainability credentials	Organic cotton, recycled polyester and renewable energy as buyer requirements
Automation	Cutting, spreading and inspection automation in response to labour constraints
Market diversification	Effort to broaden beyond the traditional European and US concentration
Domestic brands	Growing domestic innerwear and casualwear business built on the same base
Traceability	Digital tracking through the subcontracting chain, driven by buyer due diligence

CHAPTER 07

What holds it back

Tirupur's constraints are mostly structural rather than technical, and several of them are shared with the whole Indian garment export sector.

- **Labour availability.** Skilled operators are scarce and increasingly migrant, with retention a constant problem.
- **Cost against Bangladesh.** Duty access and labour cost both favour competing garment origins in key markets.
- **Water.** Even with ZLD, water availability constrains processing capacity in dry years.
- **Cotton concentration.** Heavy dependence on cotton knits leaves the cluster exposed to cotton price swings.
- **Market concentration.** Export demand is concentrated in a few markets, which transmits their downturns directly.
- **Subcontracting opacity.** Compliance verification through the job-work chain remains difficult.

CHAPTER 08

Buying from Tirupur

Tirupur is an experienced export cluster and expects to be dealt with as one. Clear technical packs and honest volumes get much better results than price pressure.

01 Send a complete tech pack

Fabric, GSM, construction, measurements, trims and tolerances. Ambiguity gets filled in for you.

02 Specify yarn and knit

Count, combed or carded, twist, setting and knit structure. Barré and spirality start here.

03 Set shrinkage and spirality limits

With test methods. These are the two most common knitwear complaints.

04 Confirm ZLD and audit status

For the dye house actually used, not just for the exporter.

05 Ask about subcontracting

Which stages go outside, and how compliance is verified there.

06 Plan the sampling calendar

Tirupur is fast, but proto, fit and PP samples still need real time. Build it in.

How Shivpriya reads it. For Tirupur programmes we focus on the **yarn specification and the dye house**. The garment factory is rarely the source of a quality complaint here — barré, spirality and shade variation almost always trace back one or two stages further up.

CHAPTER 09

Where Tirupur goes next

Tirupur's position in cotton knitwear is secure. Its growth depends on whether it can extend that position into higher-value and non-cotton product.

DIRECTION	ASSESSMENT
Cotton knitwear	Dominant and defensible. No Indian cluster competes at this depth
Man-made knits	Real opportunity, but requires machinery and processing skills built around cotton
Activewear	Growing, and a natural extension of existing knitting and finishing capability
Sustainability	A genuine advantage given the ZLD base — increasingly a commercial one
Automation	Necessary rather than optional, given labour constraints
Domestic market	A significant and under-appreciated growth path alongside export

IN CLOSING

Shut down over effluent. Reopened as an advantage.

Tirupur is the deepest knitwear cluster in India and the one that has already absorbed the environmental compliance cost that others are still facing. If you are building a knitwear programme, talk to us — we will start at the yarn and the dye house, because that is where the quality is actually decided.

TALK TO US

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