DATA REPORT

India did not lose Turkey. Turkey bought less reactive dye.

India's reactive dye exports are 28 per cent below their 2021 peak. Is India losing customers to someone else, or are the customers buying less? Checked against the import records of the countries that buy the dye.

PUBLISHED	30 September 2026, solgravitas.com/insights/india-did-not-lose-turkey
PERIOD	Calendar years 2021 to 2025; Indian financial years and Bangladesh's July to June years where stated
RECORDS USED	TRADESTAT MEIDB and EIDB (India's export records); UN Comtrade (each buyer's own import records; Türkiye's exports); Bangladesh Bureau of Statistics; Bangladesh Bank; WTO I-TIP
RETRIEVED	29 and 30 September 2026, every figure
EVIDENCE LOG	solgravitas.com/sol-gravitas-dye-study-evidence-log.csv, 144 entries
DATA REPORT	Version 1, 11 October 2026. Same figures as the published study, presented as tables.

Free to download. Every figure traced to its source.

WHAT THE RECORDS SHOW

Findings, as plain statements.

India's own export figures were checked against the import records of the countries that buy the dye. For India's two largest markets, Turkey and Bangladesh, the buyers' own records tell a clearer story than the export total does.

WHO THIS REPORT IS FOR

A reactive dye manufacturer or exporter in India deciding where to put sales effort: whether to chase Turkey back, how much to trust the Bangladesh figures, and where a competitor leads. Also a buyer or trader who wants the record behind the export totals quoted in the trade press. The tables give the figures by market and by year; the test results show which markets' records can be relied on.

01 India's reactive dye exports peaked at $773.74 million in 2021, fell to $532.25 million in 2023 and stood at $556.37 million in 2025: 28 per cent below the peak, 4.5 per cent above 2023. January to July 2026 is up 0.8 per cent on the same months of 2025.

02 Two markets dominate. In 2025 Bangladesh took 24.6 per cent of India's reactive dye exports and Turkey 15.2 per cent. Turkey's fall of $72.04 million is a third of the entire fall since 2021.

03 Turkey's total reactive dye imports fell 37.5 per cent between 2021 and 2025. India's share of them by value stayed between 60 and 66 per cent in every year. China, the next supplier, held 10 to 15 per cent.

04 Turkey bought less dye, not cheaper dye. By weight its imports fell 30.9 per cent while the average price it paid fell 9.5 per cent. The price it paid for Indian dye barely moved.

05 By weight India gave up some ground: its share of Turkey's import weight fell from 77.6 per cent in 2021 to 71.5 per cent in 2025. Turkey paid about 27 per cent less per kilogram for other suppliers' dye, with Chinese dye falling from $7.67 to $5.53 a kilogram.

06 Turkey's own exports of cotton, fabric and clothing fell 10.7 per cent over the period, and the WTO register shows no Turkish measure on reactive dyes. Neither accounts for the whole fall, and no cause is claimed.

07 Bangladesh's reactive dye imports rose 10.2 per cent by weight and 6.6 per cent in dollars between 2023-24 and 2024-25, to $307.4 million. By Bangladesh's record India supplied 66.9 per cent, a figure with no second source.

08 Bangladesh and India agree on how much dye crossed the border, within 8.1 per cent by weight, but not on what it was worth: Bangladesh's value is 38.1 per cent above India's. No dollar value for India's sales to Bangladesh is treated as confirmed.

09 Among markets that passed the buyer-side test, South Korea is the one where China supplies far more than India (59.7 against 26.6 per cent). It is a shrinking market, and India's sales there rose by about a third in 2025 on both records.

10 Pakistan imported $106.85 million of reactive dye in 2025, by its own record, and almost none from India in any year. This study did not examine why.

11 Of the published figures tested, OEC's estimates sit close to the official records for India and Turkey. For Pakistan, OEC gives 2024 imports as $110 million; Pakistan's own record is $59.57 million.

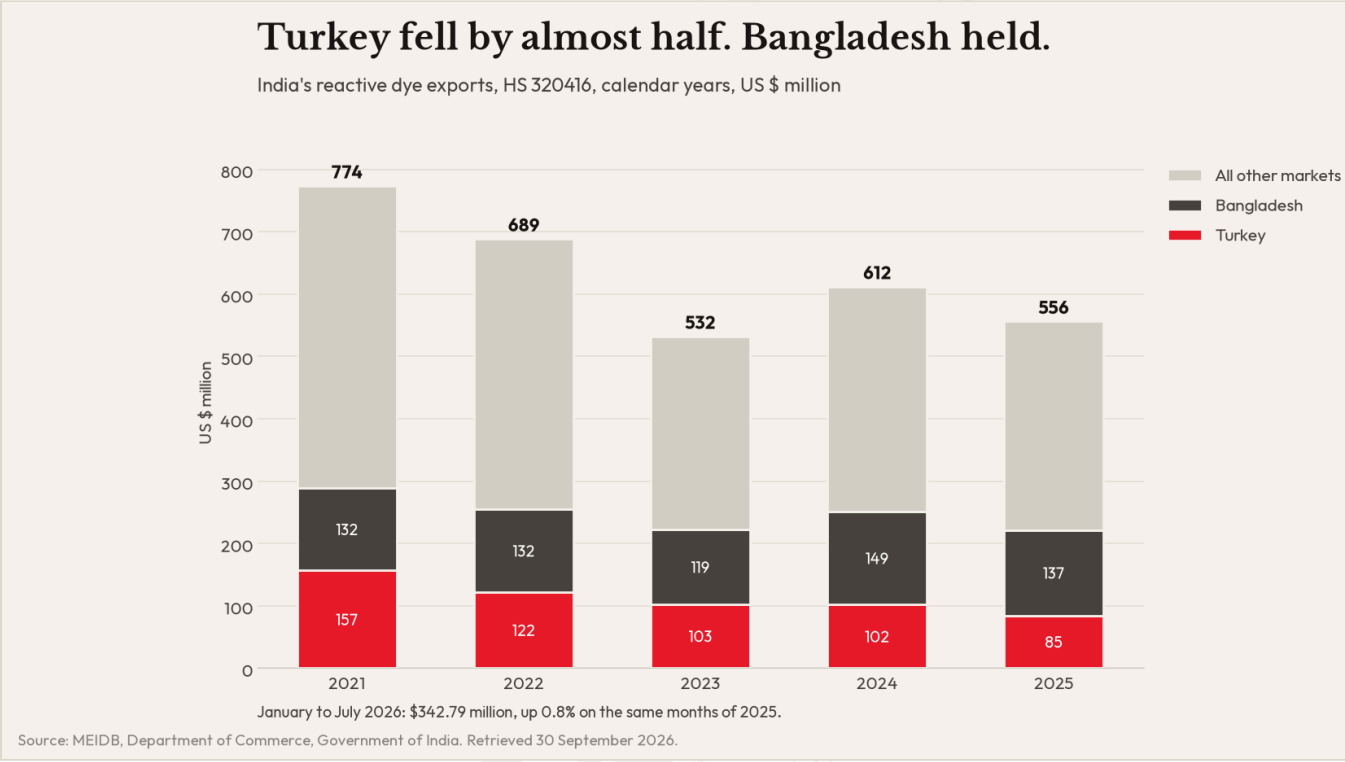
India's export records.

Reactive dyes, HS 320416, are mainly used on cotton and are India's largest dye export, though not its largest line within HS 3204.

India's reactive dye exports, HS 320416, by India's own record, US$ million

PERIOD	ALL MARKETS	TO BANGLADESH	TO TURKEY
2021	773.74	132.36	156.58
2022	688.65	132.30	122.18
2023	532.25	119.11	102.77
2024	612.04	149.31	101.80
2025	556.37	136.77	84.54
Jan to Jul 2025	339.97		
Jan to Jul 2026	342.79		63.35

Turkey 2022 is excluded from the findings because India's and Turkey's records disagree (see the Turkey table). The 2026 figure for Turkey rests on India's record alone and is not a finding. Source: TRADESTAT MEIDB, Department of Commerce, Government of India: Export, Commodity-wise all Countries, calendar year, US$ million. Retrieved 29 and 30 September 2026.



India's reactive dye exports, HS 320416, calendar years, with Bangladesh and Turkey shown separately. Source: MEIDB, Department of Commerce, Government of India. Retrieved 30 September 2026.

India's exports of all synthetic organic colouring matter, HS 3204, US$ million

YEAR	US$ M
2021	2,981.15
2025	2,256.13

Source: TRADESTAT MEIDB, Department of Commerce, Government of India: Export, Commodity-wise all Countries, calendar year, US$ million. Retrieved 29 and 30 September 2026.

India's exports by 6-digit line of HS 3204, Indian financial years, US$ million

HS CODE	LINE	FY2024-25	FY2025-26	CHANGE %
320411	Disperse dyes	82.67	76.67	-7.3
320412	Acid and mordant dyes	227.86	220.17	-3.4
320413	Basic dyes	80.63	79.44	-1.5
320414	Direct dyes	108.97	97.45	-10.6
320415	Vat dyes	61.10	57.60	-5.7
320416	Reactive dyes	609.55	535.92	-12.1
320417	Pigments	860.01	747.31	-13.1
320418	Carotenoid colouring matters	0.62	0.03	-95.2
320419	Other, including mixtures	302.31	290.38	-3.9
320420	Fluorescent brightening agents	59.28	54.09	-8.8
320490	Other synthetic organic colouring matter	24.67	29.06	+17.8
3204	**Sum of the lines above**		**2,188.12**	

The sum of the lines for FY2025-26 matches the published 3204 total (US$ 2,188.11 m) to within 0.01 m. Pigments, not reactive dyes, are the largest line. Source: TRADESTAT EIDB, Department of Commerce, Government of India: Export, Commodity-wise, 6-digit level, financial year, US$ million. Retrieved 29 and 30 September 2026.

A DATABASE ERROR, NOT USED

In TRADESTAT's EIDB, the Commodity-wise report for FY2023-24 shows reactive dye exports of US$ 1,119.18 million. The Commodity-wise all Countries report for the same code and year shows US$ 559.59 million, exactly half. The same doubling appears in other lines for that year. No figure from that report for FY2023-24 is used anywhere in the study.

THE DATA · 2

Turkey, by Turkey's own records.

Read on its own, India's 46 per cent fall in sales to Turkey looks like a lost customer. Turkey's own import records say otherwise.

Turkey: the two countries' records of the same trade, US$ million

YEAR	TURKEY'S RECORD OF IMPORTS FROM INDIA	INDIA'S RECORD OF EXPORTS TO TURKEY	DIFFERENCE	STATUS IN THE STUDY
2021	162.75	156.58	+3.9%	Used
2022	*163.65*	*122.18*	*+33.9%*	*Excluded: direction differs, gap above 25%*
2023	112.05	102.77	+9.0%	Used
2024	114.65	101.80	+12.6%	Used
2025	100.15	84.54	+18.5%	Used

Import values include freight and insurance; export values do not, so a gap of up to 25 per cent in the same direction is treated as agreement. Sources: UN Comtrade: Goods, Annual, HS, Imports, reporter as named, partner as named, US$ and net weight. TRADESTAT MEIDB, Department of Commerce, Government of India: Export, Commodity-wise all Countries, calendar year, US$ million. Retrieved 29 and 30 September 2026.

Turkey's reactive dye imports from all suppliers, and India's share by value

YEAR	TURKEY'S IMPORTS, ALL SUPPLIERS, US$ M	INDIA SHARE OF VALUE %
2021	248.20	65.6
2022	249.26	65.7
2023	185.86	60.3
2024	184.50	62.1
2025	155.22	64.5

Turkey's total imports fell 37.5 per cent from 2021 to 2025. China held between 10 and 15 per cent of value over the period. Source: UN Comtrade: Goods, Annual, HS, Imports, reporter as named, partner as named, US$ and net weight. Retrieved 29 and 30 September 2026.

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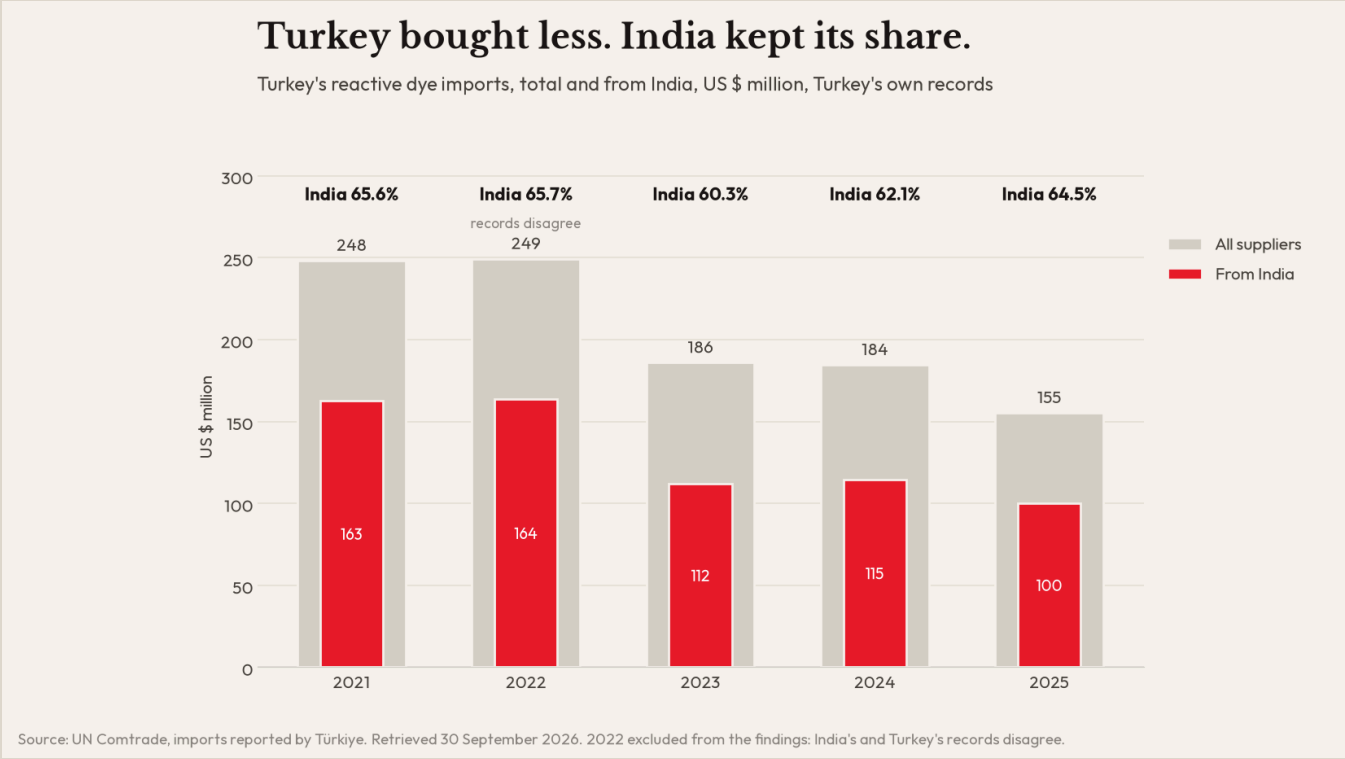
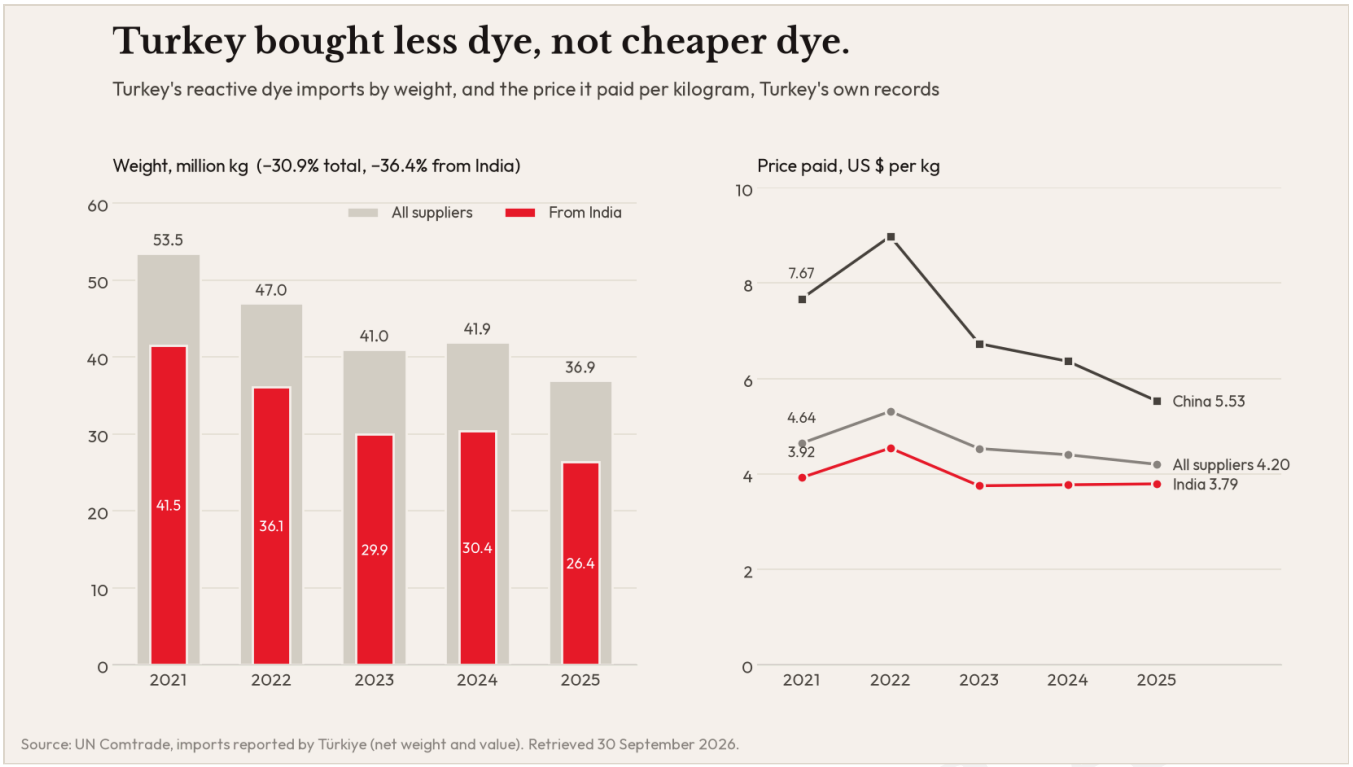


Turkey's reactive dye imports, total and from India, as recorded by Turkey. Source: UN Comtrade, imports reported by Türkiye. Retrieved 30 September 2026. 2022 is excluded from the findings because India's and Turkey's records disagree.

Turkey's reactive dye imports by weight, and the price paid per kilogram, by Turkey's record

YEAR	WEIGHT, ALL SUPPLIERS, MILLION KG	WEIGHT FROM INDIA, MILLION KG	PRICE PAID, ALL SUPPLIERS, US$/KG	PRICE PAID, INDIA, US$/KG	PRICE PAID, CHINA, US$/KG
2021	53.48	41.48	4.64	3.92	7.67
2022	46.97	36.07	5.31	4.54	8.98
2023	40.99	29.91	4.53	3.75	6.73
2024	41.91	30.40	4.40	3.77	6.36
2025	36.93	26.39	4.20	3.79	5.53

Price paid is value divided by net weight. Source: UN Comtrade: Goods, Annual, HS, Imports, reporter as named, partner as named, US$ and net weight. Retrieved 29 and 30 September 2026.



Turkey's reactive dye imports by weight, and the price paid per kilogram, as recorded by Turkey. Source: UN Comtrade, imports reported by Türkiye (net weight and value). Retrieved 30 September 2026.

Turkey by weight, 2021 against 2025

MEASURE	2021	2025
India's share of Turkey's import weight, %	77.6	71.5
Turkey's imports from India, million kg	41.48	26.39
Turkey's imports from all other suppliers, million kg	12.00	10.54
Price paid, all other suppliers, US$/kg	7.12	5.22
India's record of export weight to Turkey, million kg (FY2021-22 and FY2025-26)	41.26	25.97

Turkey's record of weight from India fell 36.4 per cent; India's record of weight to Turkey fell 37.1 per cent between the financial years shown, a difference of 0.7 points. Other suppliers' weight fell 12.2 per cent. Derived from the rows in the table above; India's weight from TRADESTAT EIDB, Department of Commerce, Government of India: Export, Commodity-wise, 6-digit level, financial year, US$ million. Retrieved 29 and 30 September 2026.

Turkey's own exports of cotton, fabric and clothing, US$ million

HS CHAPTER	GOODS	2021	2025	CHANGE %
52	Cotton	2,265.70	2,259.38	-0.3
60	Knitted fabric	2,156.43	1,631.22	-24.4
61	Knitted apparel	10,780.81	9,618.85	-10.8
62	Woven apparel	7,513.23	6,775.49	-9.8

Together these fell 10.7 per cent, consistent with weaker demand for dye but much smaller than the 30.9 per cent fall in dye volume. A search of the WTO I-TIP register (anti-dumping and countervailing coverage to the first half of 2020) found no Turkish measure on HS 3204. Source: UN Comtrade, exports reported by Türkiye, partner World. Retrieved 29 and 30 September 2026.

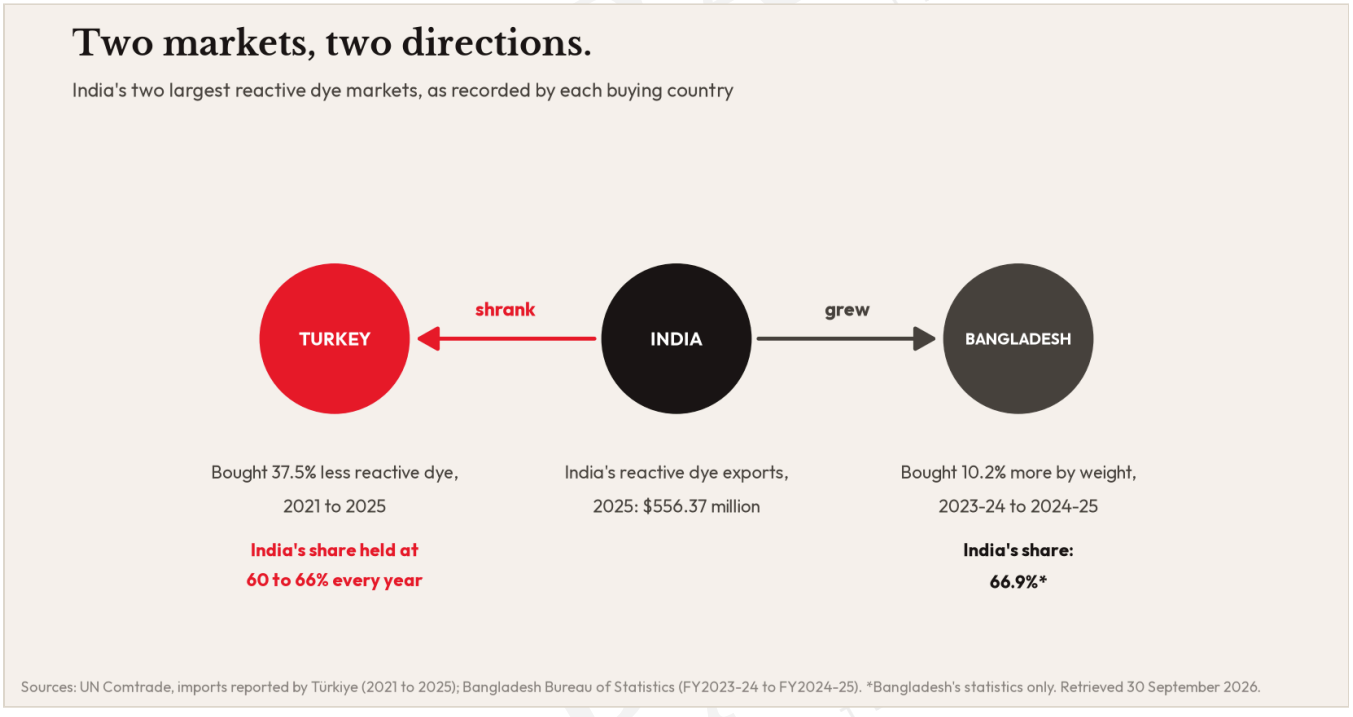
Bangladesh, by Bangladesh's own records.

Bangladesh does not report to UN Comtrade, so its figures come from its own statistics bureau, which reports years running July to June.

Bangladesh's reactive dye imports, by Bangladesh's own record, July to June years

ITEM	WEIGHT, KG	VALUE, TAKA	TK PER US$	VALUE, US$ M	STATUS
Imports from all countries, FY2023-24	60,848,849	Tk 32,015,815,787	111.06	288.3	Used
Imports from all countries, FY2024-25	67,060,691	Tk 37,169,366,045	120.82	307.4	Used
Imports from India, FY2024-25	51,163,409	Tk 24,849,834,667	120.82	205.7	Value excluded: 38.1% above India's record
India's share of imports, FY2024-25				66.9 %	Single source, Bangladesh only

Converted at Bangladesh Bank's period-average rate (Economic Trends, September 2026, Table XX). India's own record for July 2024 to June 2025 is US$ 148.89 m (MEIDB, calendar 2024 less January to June 2024 plus January to June 2025), 38.1 per cent below Bangladesh's figure, so no dollar value for India's sales to Bangladesh is treated as confirmed. By weight, India's record (EIDB FY2024-25, 47.33 million kg) is within 8.1 per cent of Bangladesh's. Sources: Bangladesh Bureau of Statistics, Foreign Trade Statistics 2023-24 (Vol. 2, Table 03) and 2024-25 (Excel, sheets Impt 03 and 04); Bangladesh Bank; TRADESTAT. Retrieved 29 and 30 September 2026.

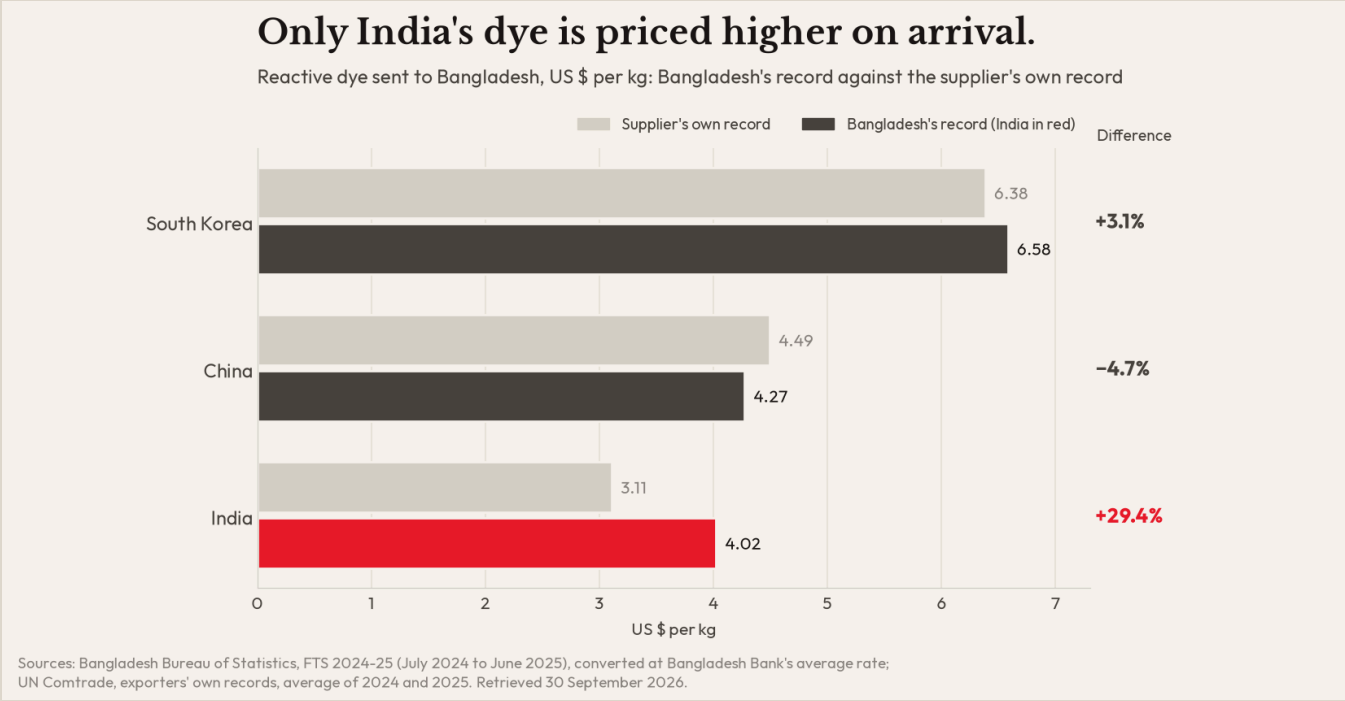


India's two largest reactive dye markets, as recorded by each buying country. Sources: UN Comtrade (Türkiye); Bangladesh Bureau of Statistics. Bangladesh's share figure rests on its statistics alone. Retrieved 30 September 2026.

Bangladesh's record of imports from each supplier, against that supplier's own record of exports to Bangladesh

SUPPLIER	BANGLADESH RECORD: US$ M	MILLION KG	US$/KG	SUPPLIER RECORD: US$ M	MILLION KG	US$/KG	DIFFERENCE, VALUE %	WEIGHT %	PRICE %
South Korea	32.45	4.93	6.58	31.21	4.89	6.38	+4.0	+0.8	+3.1
China	31.66	7.41	4.27	23.02	5.13	4.49	+37.5	+44.4	-4.7
Thailand	16.16	1.10	14.71	2.82	0.43	6.55	+472.8	+155.0	+124.6
India	205.68	51.16	4.02	141.92	45.67	3.11	+44.9	+12.0	+29.4

Bangladesh FY2024-25 against the average of the supplier's calendar 2024 and 2025 export records. For South Korea the two records agree closely, so Bangladesh's figures and the conversion can match a supplier's record. For India they do not: Bangladesh records Indian dye at 29.4 per cent more per kilogram than India does. Sources: Bangladesh Bureau of Statistics; UN Comtrade, exports reported by each supplier (India from MEIDB). Retrieved 29 and 30 September 2026.



Price per kilogram of reactive dye sent to Bangladesh, as recorded by Bangladesh and by the supplier. Sources: Bangladesh Bureau of Statistics, FTS 2024-25, converted at Bangladesh Bank's average rate; UN Comtrade, suppliers' export records, average of 2024 and 2025. Retrieved 30 September 2026.

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The other markets, and the published claims.

Every other market was put through the same buyer-side test before any figure from it was used.

The buyer-side test, 2025: India's record of exports against each market's record of imports from India, US$ million

MARKET	INDIA'S RECORD	MARKET'S OWN RECORD	DIFFERENCE	RESULT
China	35.33	40.28	+14.0%	Passed
Brazil	25.34	31.67	+25.0%	Passed
Indonesia	25.59	31.46	+22.9%	Passed
Singapore	20.21	21.66	+7.2%	Passed
Rep. of Korea	12.07	12.68	+5.1%	Passed
Egypt	11.78	13.04	+10.7%	Passed
Thailand	14.73	15.94	+8.2%	Passed
Malaysia	9.34	10.03	+7.4%	Passed
Mexico	*11.49*	*15.56*	*+35.4%*	*Dropped: gap >25%*
Italy	*5.95*	*6.43*	*+8.1%*	*Dropped: direction differs*
Germany	*5.19*	*19.24*	*+270.7%*	*Dropped: gap >25%*
Switzerland	*8.01*	*13.60*	*+69.8%*	*Dropped: gap >25%*
USA	*4.59*	*7.20*	*+56.9%*	*Dropped: gap >25%*
Portugal	*3.03*	*3.48*	*+14.9%*	*Dropped: direction differs*
Guatemala	*0.86*	*2.09*	*+143.0%*	*Dropped: gap >25%*

A market passes when the two records move in the same direction and the gap is 25 per cent or less. No finding rests on a market that failed.
Sources: TRADESTAT MEIDB, Department of Commerce, Government of India: Export, Commodity-wise all Countries, calendar year, US$ million. UN Comtrade: Goods, Annual, HS, Imports, reporter as named, partner as named, US$ and net weight. Retrieved 29 and 30 September 2026.

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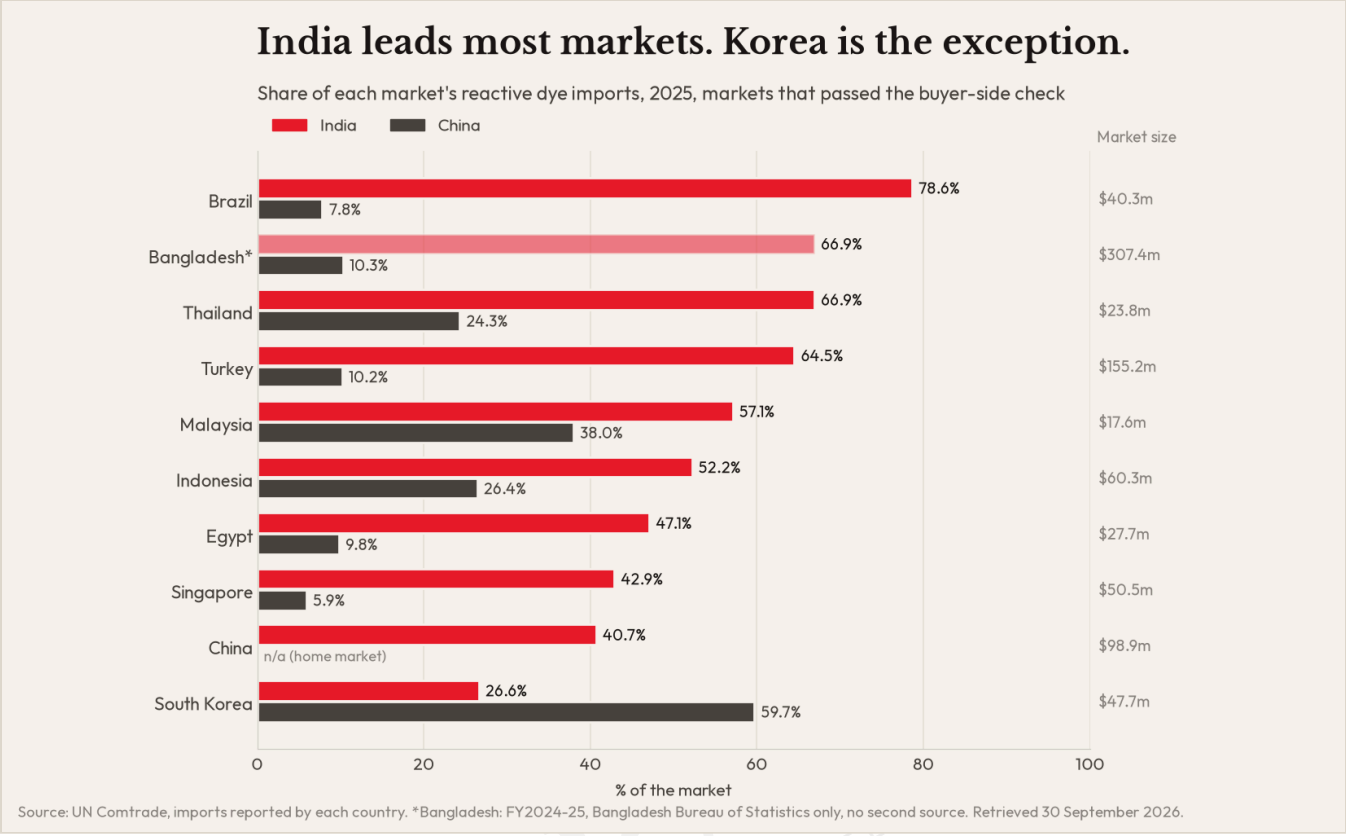
India's and China's share of each market's reactive dye imports, 2025, markets that passed the test

MARKET	INDIA SHARE %	CHINA SHARE %	MARKET SIZE, US$ M
Brazil	78.6	7.8	40.32
Thailand	66.9	24.3	23.84
Turkey	64.5	10.2	155.22
Malaysia	57.1	38.0	17.57
Indonesia	52.2	26.4	60.27
Egypt	47.1	9.8	27.69
Singapore	42.9	5.9	50.51
China	40.7	n	98.88
South Korea	26.6	59.7	47.66

South Korea is the one market in this group where China supplies far more than India; it is down 41.4 per cent since 2021. Bangladesh (66.9 per cent, FY2024-25) rests on its own statistics alone and is not listed here. Source: UN Comtrade: Goods, Annual, HS, Imports, reporter as named, partner as named, US$ and net weight. Retrieved 29 and 30 September 2026.



India's and China's share of each market's reactive dye imports, 2025, for markets that passed the buyer-side test. Source: UN Comtrade, imports reported by each country. Bangladesh: FY2024-25, Bangladesh Bureau of Statistics only. Retrieved 30 September 2026.

Pakistan's reactive dye imports from all countries, by Pakistan's own record, US$ million

YEAR	US$ M
2021	100.67
2022	77.46
2023	58.65
2024	59.57
2025	106.85

India's exports to Pakistan were close to nil in every year from 2021 to 2025. This study did not examine why. Source: UN Comtrade: Goods, Annual, HS, Imports, reporter as named, partner as named, US$ and net weight. Retrieved 29 and 30 September 2026.

Published figures tested against the official record, US$ million

PUBLISHED CLAIM	PUBLISHED FIGURE	OFFICIAL RECORD	DIFFERENCE	RESULT
OEC: Pakistan's imports, 2024	110	59.57 (Pakistan's own record)	+84.7%	Does not match; Pakistan reaches that level only in 2025
OEC: India's exports, 2024	645	612.04 (MEIDB)	+5.4%	Close
OEC: Turkey's imports, 2024	179	184.50 (Türkiye's own record)	-3.0%	Close
CHEMEXCIL dyes panel exports, FY2025-26	2,189.85	2,153.16 (EIDB, HS 3204)	+0.08%	Consistent; same underlying source (DGCI&S)

OEC publishes modelled estimates, not a government's record; they are quoted here only as published claims to be tested. Sources: oec.world reactive dyes profile, viewed 30 September 2026; CHEMEXCIL export performance page; TRADESTAT. Retrieved 29 and 30 September 2026.

METHOD

How this was checked.

India's export figures come from TRADESTAT MEIDB (calendar years) and EIDB (financial years), the Department of Commerce's databases. Each buying country's import figures come from that country's own report to UN Comtrade, or, for Bangladesh, from the Bangladesh Bureau of Statistics' Foreign Trade Statistics, converted to dollars at Bangladesh Bank's period-average rate.

The buyer-side test: a market's own import record was set against India's export record for the same year. The market passes when the two move in the same direction and differ by 25 per cent or less, the allowance being for freight and insurance, which import values include and export values do not. Where a market or a year failed, nothing in the study rests on it. Turkey 2022, Bangladesh's dollar value, and seven smaller markets were dropped this way.

Shares are India ÷ the market's total imports, by value or by net weight as stated. Prices per kilogram are value divided by net weight and are not transaction prices.

Published figures (OEC, CHEMEXCIL) were tested against the official records, not used as sources. Figures India reports to UN Comtrade and WITS come from the same source as TRADESTAT and were not counted as a second check.

The Research Standard applied to every figure

01 Named, checkable source

Every figure comes from a source that can be named and opened: an official database, a company filing, or a record Sol Gravitas retrieved itself.

02 Checked against a second record

Each finding is checked against a second, separate source. Where the two disagree, the gap is stated or the figure is dropped.

03 Method and date stated

The query path and the retrieval date are recorded for every figure, so anyone can repeat the retrieval.

04 Limits stated

What the records cannot show is written down. If any gate fails, the finding does not ship.

EVIDENCE LOG

Every figure in the study and in this report is listed in the evidence log with its source, the query path, the retrieval date, the second record it was checked against, the difference between the two, and its status, including the findings that were dropped. The log is free at solgravitas.com/sol-gravitas-dye-study-evidence-log.csv.

LIMITS

What these records cannot show.

Findings were dropped. Turkey's 2022 figures are excluded because the two records move in opposite directions. Bangladesh's dollar value is excluded because the two records differ by 38.1 per cent. Mexico, Italy, Germany, Switzerland, the United States, Portugal and Guatemala failed the buyer-side test in 2024 or 2025, and no finding rests on them.

A database error was found. TRADESTAT's EIDB Commodity-wise report for FY2023-24 shows reactive dye exports at exactly twice the figure in the Commodity-wise all Countries report. No figure from that report for 2023-24 is used.

Some checks could not be made. Turkey's statistics office (TÜİK) could not be queried, so the 2026 recovery in Turkey rests on India's figures alone. The India-specific row of Bangladesh's 2023-24 report could not be extracted. Vietnam's figures for 2024 and 2025 were not in UN Comtrade on the retrieval date. The WTO register covers anti-dumping and countervailing measures only to the first half of 2020.

Different years and values. India reports financial years (April to March) and calendar years; Bangladesh reports July to June. Import values include freight and insurance; export values do not. Bangladesh Bank's weighted interbank rate (Tk 122.85 for 2024-25) would lower the dollar figures by about 1.7 per cent and changes no conclusion. Turkey's textile figures are export values and do not cover production for its home market.

Leads were corrected. An earlier scan suggested reactive dyes were India's largest line in HS 3204; pigments are larger. It also placed Pakistan's $110 million of imports in 2024; Pakistan's own record puts that level in 2025.

Sources not used. OEC figures are modelled estimates and are quoted only as published claims to be tested. Published market-size estimates for India's dye industry were not examined.

No causes are stated. Where no official source explains a movement, the study says so. This report is general information, not business, investment or legal advice.

Sol Gravitas will publish any correction provided by the Department of Commerce, the UN Statistics Division, the Bangladesh Bureau of Statistics or any other party, in full and without editing. Corrections and queries: info@solgravitas.com

SOL GRAVITAS MARKET RESEARCH & INTELLIGENCE

This report answers one question for everyone. *A commissioned one answers yours.*

Everything in this document was built from public records and is published free. The same method, applied to one firm's own markets, products and competitors, produces a brief that is scoped to that firm's decision and kept private to it.

SECTOR BRIEF

One sector, one question, a written answer with the data tables, the evidence log and a one-page owner summary in English, Hindi or Gujarati. Pricing on request.

CUSTOM RESEARCH AND MONITORING

Several markets, interviews or surveys, or the same question re-run every quarter as the records update. Scope, method, deliverables and cost agreed in writing before work starts.

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