

# TEXTILE



CONFEDERATION OF INDIAN TEXTILE INDUSTRY  
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# TIMES

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JUN - AUG 2023

11<sup>th</sup>

## *atexcon* Asian Textile Conference



CONFEDERATION OF INDIAN TEXTILE INDUSTRY  
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### GUESTS OF HONOUR



**Shri S Muthusamy**  
Hon'ble Minister for Housing, Urban Development and  
Prohibition and Excise, Government of Tamil Nadu



**Shri R Sakkarapani**  
Hon'ble Minister for Food and Civil Supplies,  
Government of Tamil Nadu



**Shri R Gandhi**  
Hon'ble Minister for Handlooms and Textiles,  
Government of Tamil Nadu



**Smt. Darshana Vikram Jardosh**  
Hon'ble Minister of State for Textiles & Railways,  
Government of India



**Shri Piyush Goyal**  
Hon'ble Union Minister of Textiles,  
Commerce & Industry, Consumer Affairs  
and Food & Public Distribution

### CHIEF GUEST

11<sup>th</sup>

## Asian Textile Conference

August 31 - September 1, 2023

Radisson Blu, Coimbatore, India

2025 AND BEYOND – ASIA, THE GLOBAL HUB FOR TEXTILE MANUFACTURING & CONSUMERS

Join us at



11<sup>th</sup>

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August 31 - September 1, 2023

Radisson Blu, Coimbatore, India

2025 AND BEYOND – ASIA, THE GLOBAL HUB FOR TEXTILE MANUFACTURING & CONSUMERS

**The Most Awaited Annual Mega Event**  
of Textiles & Apparel value chain supported  
by the Global Textile Fraternity.

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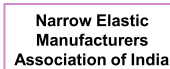
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No Participation Fee  
Registration Mandatory



Friends, At the outset, I would like to congratulate ISRO scientists and my countrymen on the successful launch of Chandrayan- 3. Its landing on the Moon's south polar region holds great scientific interest due to its hitherto unexplored unique characteristics which can pave way for many more scientific pursuits in that region for benefit of the mankind. The success holds great relevance for India as it reinforces our resilience and strengths in overcoming all odds and finding unique economical and innovative solutions. I think it's a great precursor to our forthcoming event, ATEXCON, which again is an event that recognises Asia's position in global Textile and Apparel sector growth and India's growing leadership role in this.



I have great pleasure in welcoming the entire textile fraternity to CITI's forthcoming flagship event - 11th Asian Textile Conference (ATEXCON) which brings together the global players, service providers of the Asian textile industry, leading Industry associations and Export promotion Councils to a forum to analyse along with the policymakers and deliberate on key areas of growth, business, and economics. 11th ATEXCON will deliberate on regional as well as global issues concerning this sector. The Conference would also focus on emerging opportunities through cross-country cooperation. With this background, ATEXCON has become an important platform for discussing the major technological advancement happening in the textile industry & and in raw material field as well as showcasing the best practices in the textile value chain.

The Indian Textile and Apparel Industry has been passing through a phase that's challenging as well as exciting times. There are robust growth and business opportunities for the verticals like manmade fibres, environmentally benign sustainable technologies, and technical textiles value chain. The policy measures from the Government have been in place over the last two years which have also led to a substantial improvement in economic parameters and are laying the foundation for new opportunities and growth for the industry. At the same time, all have to collectively deliberate in finding solutions to the ailing issues concerning the degrowth of the industry and must work out ways to make the schemes for investment and capacity building more effective and leveraged by larger segments of the industry.

The industry is experiencing pressure on demand stagnation, strict quality norms, pricing, and managing piling up inventory on large exposures. ATEXCON is happening when the industry and government are looking at solutions to this conundrum. The global textiles and clothing industry is going through a phase of restructuring and consolidation brought about by shifts in changing sourcing norms, ESG reporting, and digitalization. The world is yet to recover from the after-effects of the pandemic, the war in Ukraine, and sticky inflation. In a nutshell, these are the opportunities and challenges faced by the industry. We are sure we will be able to collectively combat the situation and deep dive to find solutions to cull out growth during this tough global scenario.

The urgent need for revitalising the industry calls for demand and supply side interventions and policy support. Our ambitious target of building a US\$ 350 billion industry by 2030 will surely need immediate steps for strengthening the value chain. We are privileged to have with us Hon'ble Union Minister of Textiles, Commerce & Industry, Consumer Affairs and Food & Public Distribution, Shri Piyush Goyal and also Minister of State for Textiles and Railways, Smt, Darshana Vikram Jardosh at the 11th ATEXCON to give the required Government perspective to the discussions.

I am also happy to share the support received from the Tamil Nadu Government, which is not only for partnering this event, but also for strengthening the deliberations with presence of senior leaders like Shri S. Muthusamy, Hon'ble Minister of Housing and Urban Development, Shri R. Sakkarapani, Hon'ble Minister for Food and Civil Supplies and Shri R. Gandhi, Hon'ble Minister for Handlooms and Textiles, Govt of Tamil Nadu. With a galaxy of International speakers, experts and industry stalwarts, I am sure the upcoming 11th ATEXCON conference in Coimbatore will provide a conducive forum for policymakers and the industry to collaborate and brainstorm to find the way forward for inclusive and sustainable growth of the Textile Industry through 2025 and beyond.

I thank Gherzi Textil Organisation, the Knowledge Partner and Southern India Mills' Association (SIMA) the Host Association of 11th ATEXCON. I also thank AEPC, SRTEPC, Texprocil, CMAI, TEA, Karur Textile Manufacturers' Exporters Association, HEPC, ITMF, JAAFSL and all other industry associations and our member associations who have come together to collectively explore ways to strengthen the textile ecosystem. I thank the sponsors, supporting partners and media partners who have helped in spreading the message that ATEXCON aims to promote – Partnerships for Sustainable Development.

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India today is celebrating two major milestones in its global leadership role – the G20 presidency and the successful launch of Chandrayan -3. While in the first, it is steering discussions and initiatives among the world's major economies to address complex challenges and steering partnerships and collaborations for a sustainable, inclusive growth for all, the second achievement underscores India's growing vision, aspirations and prowess to break new grounds in the areas of science, technology and innovations.



The discussions in G20 around inclusive growth, digital innovation, climate resilience, and equitable global health access for global well-being, has huge significance for the textile sector. While the sector is considered one of the high contributors to climate risks due to its contribution to landfills and footprints on blue water and carbon, there is also an opportunity in making the high impact on reversing its role through positive action.

The discussions on sustainability are increasingly moving towards data driven monitoring and demonstration of the ESG performance of industry. CITI through its ESG series has highlighted how intrinsic it has become to business imperatives as it helps in managing risks – supply chain risks, financial risks, credit risks and at the same time in gaining competitive advantage as it improves governance, resource optimisation and green products.

It is heartening to note that the Ministry of textiles has initiated the ESG Task Force this month. The task force aims at supporting the industry to transition to a sustainable circular T&A sector. Bringing various, users, service providers, manufacturers, sorters, waste handlers innovators and other stakeholders together, such a multistakeholder forum can bring the right knowledge, application and dissemination of the Whys, How's and What's of ESG. CITI, as a member of this task Force is committed to provide a good industry connect to the ESG initiatives planned under the Task Force. CITI will also continue with awareness series for greater understanding and capacity building of the industry to manage, monitor and report on ESG parameters for meeting the requirements of data and transparency by global and domestic brands. All suggestions from members and industry are welcome in this regard.

This special edition of Textile Times on the occasion of the 11th ATEXCON acknowledges the growing role of Asia, as the global hub for textile manufacturing and consumers, to steer the advancements in innovation and collaborations for a greener global textile value chain. Asia has emerged as the major sourcing hub for international brands and retailers as Asia held 65 per cent market share of the nearly \$ 800 bn world trade. The demographic dividend of this continent with an estimated per capita textile consumption of 14 kgs means the immense opportunities as also responsibility that the textile industry players in this Continent have.

Each Business session at the Conference looks into an important aspect of the T&A business today with this lens. Discussions around Enabling Resilient Textile & Apparel Supply Chains, Regional Cooperation And Partnerships For Sustainable Development, Emerging Trends & Opportunities In The MMF Based Value Added Textiles Including Technical Textiles, Green Revolution: Scaling Sustainable Textile & Apparel Manufacturing and Managing Financial Risks, all have an underlying need for collaborative solutions.

In a recent Press Meet organised by CITI in association with SIMA, Texprocil and SRTEPC, the industry in an unanimous voice shared its optimism for a reversal in the declining trends in production and exports. While the industry believes in its intrinsic strengths – in terms of strong raw material base, skilled workforce, stable and growing economy and forthcoming FTAs for improved access to important textile trading partners, the constraints on account of import duties on critical raw materials like cotton and slow pace of implementation of important investment incentivising schemes were highlighted as urgent areas of review.

Strength and growth comes only through continuous effort and struggle. Along with it, deliberations and consultations to address risks as well as capitalize on growth opportunities, specially partnerships, to maximise impact and reduce cost are today's need. We look forward to ATEXCON to address all these and more.



## A Curtain Raiser

# 11<sup>th</sup> Asian Textile Conference

August 31 - September 1, 2023

Radisson Blu, Coimbatore, India

**2025 AND BEYOND – ASIA, THE GLOBAL HUB FOR TEXTILE MANUFACTURING & CONSUMERS**

Confederation of Indian Textile Industry (CITI) is organizing the 11th Asian Textile Conference (ATEXCON) on 31st August and 1st September 2023 at Coimbatore with the theme: 2025 AND BEYOND – ASIA, THE GLOBAL HUB FOR TEXTILE MANUFACTURING AND CONSUMERS. The Conference is taking place when the industry is at crossroads. The global textiles and clothing industry is going through a phase of restructuring and consolidation brought about by shifts in sourcing, climate change and digitalisation. The world is yet to recover from the after-effects of the pandemic, the war in Ukraine and sticky inflation. In a nutshell these are the opportunities and challenges facing the CEOs and policy makers in the Asian textile landscape today.

Asia has emerged as the hub for textile production. According to the International Textile Manufacturers Federation (ITMF), Zürich, in 2021, Asia and Oceania accounted for 89 per cent of ring spinning capacity, 82 per cent of shuttle-less weaving and 85 per cent of circular knitting capacity in the world. 50 per cent of cotton and 80 per cent of man-made fibres are produced in Asia. Asian non wovens production doubled in the last decade and occupies over 50 per cent per cent world market share [INDA, EDANA].

Textiles and clothing rank among the Top 5 manufactured goods trade globally [WTO]. Notably, Asia has emerged as the major sourcing hub for international brands and retailers as Asia held 65 per cent market share of the nearly \$ 800 bn world trade

[2021]. It is not a coincidence that two of the world's 5 largest fashion brands – Uniqlo [\$ 19bn] and Shein [22.7bn] - are domiciled in Asia.

Asia is reaping the demographic dividend. The combined GDP of 50 Asian countries at \$41 trillion represented about 40 per cent of the global GDP [IMF,2022]. The continent is home to 60 per cent of humanity with an estimated per capita textile consumption of 14 kgs [ICAC]. The vast population with changing lifestyles will remain a key demand driver for consumer and technical textiles in future.

The economic heft also brings a sense of responsibility. Textile and apparel manufacturing companies in Asia are embracing new ESG driven business models. Technological upgradation to improve resource efficiency has become a norm. Huge investments are being made in circular production systems.

Gherzi(11th ATEXCON Knowledge Partner) aptly described the global textile & clothing industry undergoing a step change characterized by sourcing shifts, sustainability and digitalization. While the 'polycrisis' facing the industry is real and poses challenges, at the same time, there are opportunities to align your business models to the emerging trends. Strengthening the textile eco system is a policy imperative. Navigating through the 'polycrisis' requires close collaboration among the stakeholders.

The upcoming 11th ATEXCON in Coimbatore provides a conducive forum for policy makers and the industry to collaborate and find the way forward to usher the Asian textile industry to a sustainable future through 2025 and beyond.

11th ATEXCON is going to witness participation from renowned international textile speakers, experts, industry leaders, policy makers, etc. The enriching discussions over the two days will help the industry unfold many queries in the minds of the industry players in terms of looking up for new partners, new destinations, sourcing countries, etc.

We are extremely grateful to Hon'ble Union Minister of Textiles, Commerce & Industry, Consumer Affairs and Food & Public Distribution for kindly agreeing to inaugurate the ATEXCON and consenting to our request to deliver the Keynote Address. I would also like to place on record my special thanks to Ministry of Textile Officials, Organising Committee, Speakers, Moderators, Co-Partners ITMF, CMAI, NITRA, BTRA, SITRA, ATIRA, UIBC, SRI LANKA APPAREL, PDEXCIL, FIEO and IICCI, Knowledge Partner Gherzi, Host Association SIMA, MEDIA Partners, Sponsors, Advertisers, Participants and CITI Secretariat for their

overwhelming support to make ATEXCON a grand success. At the time of going to press, more than 400 delegates have already registered. I wish everyone involved in the 11th ATEXCON all the best and look forward to your active participation to make the 11th ATEXCON a great success.

## **DAY 1: ATEXCON:**

### **THEME SESSION: 2025 AND BEYOND – ASIA, THE GLOBAL HUB FOR TEXTILE MANUFACTURING & CONSUMERS:**

Asia has already established itself as a significant hub for textile manufacturing and consumption. Countries such as China, India, Bangladesh, Vietnam, and others in the region have become major players in both the production and consumption of textiles and apparel. The theme session would have a welcome address, followed with theme presentation by Gherzi, Knowledge Partner for the 11th ATEXCON, Keynote address by the Hon'ble Minister of State for Textiles and Railways and Vote of Thanks

### **SESSION I: ENABLING RESILIENT TEXTILE & APPAREL SUPPLY CHAINS:**

Textiles and apparel supply chains are complex and involve multiple tiers and factors. Apparel manufacturing is an itinerant industry directly influenced by changes in rules of global trade, FTAs, labour cost and productivity. Social and HSE compliance protocols increasingly play a critical role. Building a resilient supply chain often involves a combination of strategic planning, technology adoption, collaboration, and risk management. By implementing these strategies, the industry can better navigate disruptions and maintain a steady flow of products to meet consumer demands, even in challenging circumstances. The panelists will delve into some key approaches to promote resilience within these supply chains. The session will be chaired by Ms Roop Rashi, Textile Commissioner.

### **SESSION: REGIONAL COOPERATION AND PARTNERSHIPS FOR SUSTAINABLE DEVELOPMENT:**

Textile industry is among the most globalized industries in the world. It's undergoing a paradigm shift with geographical shifts in the industry to emerging countries with competitive factor costs and favourable market access conditions. Regional cooperation and partnerships play a crucial role in



promoting sustainable development in the industry. The industry has significant social, economic, and environmental impacts, and addressing these challenges requires collaborative efforts among countries, governments, businesses, and civil society. The panelists will; deliberate on how these collaborations can drive positive change and create a more sustainable and ethical industry.

**SESSION: INTERACTIVE SESSION WITH  
SHRI PIYUSH GOYAL, Hon'ble Union  
Minister of Textiles, Commerce and Industry  
and Consumer Affairs, Food and Public  
Distribution:**

Keynote address by the Hon'ble Union minister will set the stage for the Conference. It will be an opportunity to articulate the government's vision and policy imperatives to reposition the textile and apparel industry in the context of emerging trends. The stakeholders will take advantage of the occasion to proffer constructive suggestions on unlocking the potential of the sector.

**DAY 2: ATEXCON:**

**SESSION: EMERGING TRENDS &  
OPPORTUNITIES IN THE MMF BASED  
VALUE ADDED TEXTILES INCLUDING  
TECHNICAL TEXTILES:**

Man-made fibres already occupy 70% share of the world mill fibre consumption. The trend is likely to continue due to demand and supply dynamics coupled with the functional properties of synthetic fibres. The global technical textiles market is estimated at USD212 billion in 2022 and is expected to reach USD274 billion by 2027, growing at a CAGR of 5.2 per cent during 2022-27 backed by increasing global demand for technical textiles across industries and expanding base of new applicative products being developed at a rapid rate.

The Asia-Pacific region is poised to grow fastest and is valued at USD76.8 billion in 2022, and is projected to grow at an impressive rate with CAGR of 6 per cent to reach USD102.6 billion by 2027. This growth is attributed to sectors including healthcare, automotive, construction and industrial development apart from enhanced government focus and increasing application cognisance towards technical textiles in the region.

The panelists will discuss the growth opportunities for technical textiles in India, major challenges being faced by the technical textile industry. There will also be a discussion on the key policy initiatives and incentives needed to promote the MMF industry with a focus on technical textiles. The session will be chaired by Mr Rajeev Saxena – Joint Secretary, Ministry of Textiles.

**SESSION: COLLABORATING WITH INDIA:  
INVITING STATE PARTNERS WITH PM  
MITRA MEGA TEXTILE PARKS:**

The Government of India attaches high priority to textiles and apparel manufacturing, an important pillar of the “Make in India” initiative. The Government is working closely with the industry, enabling policies to help catapult growth as India enters the Amrit Kaal and holds the prestigious G20 presidency. The recent announcement to up seven mega textile parks under PM Mega Integrated Textile Regions and Apparel scheme has given a big boost to the Indian Textiles Industry and the Make in India efforts of the Government. The session will serve as a unique platform for the industry and investors to discuss the benefits, incentives available and the investment opportunities in the textiles sector in general and under the PM MITRA Scheme in particular. The session will be chaired by Mr Rohit Kansal, IAS, Additional Secretary, Ministry of Textiles

**SESSION: GREEN REVOLUTION: SCALING  
SUSTAINABLE TEXTILE & APPAREL  
MANUFACTURING:**

Textile, apparel, and fashion industries contribute significantly to global environmental pollution at every point of the supply chain. Clothing manufacturing and transportation produce a large volume of waste and high greenhouse gas emissions, often taking advantage of cheap labour in developing countries. As a result, stakeholders are becoming more aware of the effect of the textile, apparel, and fashion industries on the climate and human rights, thus pushing businesses to mitigate their environmental damage. The discussions points of the panelists will be Pathways to Achieve Net Zero Emissions & Water Net Zero, Innovative Green Technologies in Textile Manufacturing, Circular Economy & Textile Recycling, Certification & Standards for Sustainable Textiles, and Negotiating the EU-Green Deal – Impact on Textile Industry. The session will be chaired by Ms Prajakta Verma, IAS, Joint Secretary, Ministry of Textiles



### **SESSION: TRENDS, DEVELOPMENTS AND INNOVATIONS IN HOME TEXTILES:**

The global home textile market size was valued at USD 119.09 billion in 2022 and is expected to grow at a compound annual growth rate (CAGR) of 5.7% from 2023 to 2030. Home textiles have become more than a basic necessity in modern homes across the globe. They are increasingly being viewed as an extended part of a homeowner's personality, tastes, and preferences. Product manufacturers have been constantly innovating in terms of designs, styles, quality, patterns, and applications to attract more consumers. Spending on interior design and house decoration has expanded as a result of the expanding real estate industry and rising standards of living. This is also anticipated to be one of the major drivers of market expansion throughout the foreseeable future. The panelists will provide insights into the Market Dynamics, New Fabrics and Changing Demand, Mapping out the new markets, Why Indian Home Textile Exporters are Shifting Focus Inwards, Made-In-India manufacturing solutions for Home Textile Industry, Responsible sourcing and transparency in the home textile industry, Home Textiles Growth Trajectory Post Covid-19 and Technological Innovations

### **SESSION: MANAGING FINANCIAL RISKS IN TEXTILES & APPAREL BUSINESS:**

The textile industry faces various financial risks, from having lenient payment terms to negotiating weak contracts. The presentation will delve into varied aspects of the financial risks right from practicing caution to evaluate the risk scores of your current and potential customers to mitigate risks from trade and investment.

I once again thank Hon'ble Union Minister of Textiles, Commerce & Industry, Consumer Affairs and Food & Public Distribution, and all the eminent moderators, Speakers, Co-Partners, Knowledge Partner, Sponsors, Authors who have contributed articles in the Textile Times Special Edition, Media and Delegates, for their whole-hearted support for the success of 11th ATEXCON. CITI will continue to foster opportunities for dialogue among the key stakeholders to contribute positively to a sustainable growth through 2025 and beyond.



[advertorial]



# Valtech Group's Milestone Move

Valtech Group Expands Horizons in Asia to Elevate Customer Reach

**Valtech Group is expanding its reach in Asia with a new plant and office in Khopoli, India, marking a strategic move to boost capabilities and innovation in the region.**

Valtech Group is a group of independent machine builders that bring state-of-the-art solutions in their area of expertise to customers all across the world. The group is active in a wide range of industries, including the textile, automotive, hydraulic, and recycling industries.

## **Valvan: A Dominant Force in Fibre Baling**

The group has 16 companies, including Valvan, an established player in fibre baling. Valvan is globally recognized, offering sorting and baling systems for textile recycling and the second-hand market. With automated and semi-automatic supply systems, baling presses, sorting systems, and more, their portfolio leads the industry. Since acquiring Gualchierani in 2010, Valvan maintains a strong presence in acrylic fibre baling.

## **Valtech Group Accelerates Asian Expansion**

Through its Indian subsidiary, Valvan Soenen India Pvt Ltd., Valtech Group is rapidly growing in Asia, with key clients such as Grasim, Indo Rama, Bombay Dyeing, Lenze, Reliance, and Vardhman.



CEOs of the Valtech Group: Frank and Peter Vandeputte.

► Recently, the group has announced plans for a new office in India, enhancing its Asian market presence. Located in Khopoli along the Pune Express highway near Mumbai, this facility signifies a significant milestone as the group's inaugural manufacturing site outside of Europe.

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# SCIENTIFIC PROCESSING OF COTTONSEED VIS-A-VIS TRADITIONAL PROCESSING

ROLE OF ALL INDIA COTTONSEED CRUSHERS' ASSOCIATION (AICOSCA), MUMBAI



**Mr. A.K. Chowdhury**

Secretary, AICOSCA

This Association, one of the oldest of its kind, having been established in the year 1959 on recommendation of an Ad-hoc Committee constituted by the Government of India to examine problems of Cottonseed Crushing Industry and make recommendation regarding its future development.

The Association is a “Public Trust” registered under Bombay Public Trust Act 1950 and is incorporated as a “Company Limited” under the Companies Act 1956. AICOSCA is also a 'stakeholder' in the newly formed Committee by the Government in September, 2020,

under the aegis of the “Committee on Cotton Production and Consumption” (COCPC).

The Association is also approached by the Government of India to provide feedback regarding issues and developments pertaining to the Cotton seed sector economy to the Commission for Agriculture Costs and Prices (CACP), Ministry of Agriculture and Farmers welfare, Government of India in the context of formulating 'Price Policy' by the CACP for Kharif Crops (including cotton) for different seasons.

## **Production of Cottonseed:**

Cotton seed is a by-product of cotton plant and is a valuable source of various agricultural and Industrial products like linters, hulls, cotton seed meal as also an important source of edible oil. These are also excellent and nutritious source of cattle, poultry and fish feed. Cotton seed forms 2/3<sup>rd</sup> portion of seed cotton, while lint forms remaining 1/3<sup>rd</sup> portion. Since all parts of cotton seed provide food, feed and valuable industrial products, cotton seed is rightly termed as a “Golden Goose”. Unlike other oilseeds, cottonseed is not grown exclusively for oil & feed. The main product is cotton fibre (lint). Cottonseed production in India is now above One crore Metric Ton mark and is now the highest among major oilseeds in India like soya, mustard etc., in terms of production tonnage.

### **1.Principal Activities:**

The principal activities of the Association are as under:

- i) Publish “**MONTHLY NEWSLETTER**” incorporating month's happenings in Cotton and Cottonseed Production, Cottonseed trade and industry in India and abroad, “Economic News” relating to oilseed trade and industry in general, technical articles on scientific processing of Cottonseed and on other related subjects, policy issues regarding export of cottonseed by-products etc.
- ii) Publish ' **ANNUAL REPORT**' containing years happenings in cotton production, trade and processing industry, policy issues relating to cottonseed processing including export-import of cottonseed and its by-products.
- iii) Organise Seminars/Workshops to propagate scientific processing of cottonseed and by-products like linters, hulls, cottonseeds oil etc., change over from traditional (oil based) cattle feeding to modern (Protein based) cattle feeding with extensive use of compound cattle feed.
- iv) Publish educational material including Video Films, Pamphlets, Leaf-lets etc., for propagating scientific processing of cottonseed.
- v) Counseling Government in formulating pragmatic policy for development of cottonseed processing industry on modern lines in tune with the developed countries.

## **Cotton seed Processing –**

### **(I) Traditional Method**

In this method the seeds are simply mechanically crushed as such for production of oil without undergoing the process of delinting/dehulling, solvent extraction etc. The process is primitive in nature and yields only about 12 - 13 % of crude oil which is inferior in quality and dark in colour. It produces about 80 – 85% of the oil cake which has low nitrogen and fiber content. This also results in passing of about 7% oil in oil cake which is considered as wastage. It is a wrong assumption that oil content in the cottonseed cake raises milk yield or increases fat percentage in milk. Oil is required for generation of energy which the cattle themselves generate while rumination as put forward by the National Dairy Research Institute (ICAR) Karnal.

Major portion of the cottonseed processed in the country is through traditional method, while about 10% is through scientific processing method. The net result is that not only we lose about 7% to 8% of the precious oil, but the oil is often of inferior quality. Oilcake obtained is also of low protein content.

### **(ii) Scientific Processing of Cottonseed:- AICOSCA's Role**

#### **Scientific processing of cottonseed involves following steps**

- |         |   |                                   |
|---------|---|-----------------------------------|
| Step 1  | - | Cleaning of Seed                  |
| Step 2  | - | Delinting                         |
| Step 3  | - | Dehulling                         |
| Step 4  | - | Separation of seed meat from hull |
| Step 5  | - | Seed Meat Drying                  |
| Step 6  | - | Flaking and rolling of seed meal  |
| Step 7  | - | Cooking of seed meat              |
| Step 8  | - | Extraction of oil                 |
| Step 9  | - | Degumming                         |
| Step 10 | - | Refining of oil                   |
| Step 11 | - | Washing of Refined oil and        |
| Step 12 | - | Bleaching.                        |

By adopting this method, we are able to recover almost all oil content in the seed, valuable by-products like linter, hull etc. besides getting resultant oilcake (Deoiled cake with high protein content of about (40 - 42 %) and low fiber content).



### Progress of Scientific Processing of Cottonseed

(In Lakh tonnes)

	2019-20	2020-21	2021-22	2022-23
<b>1. Cotton Production</b>	365.00	352.48	311.17	<b>337.23</b>
<b>2. Availability of cottonseed for Processing</b>	121.55	117.38	103.62	<b>112.30</b>
<b>3. Cottonseed Processed Scientifically (%)</b>	10.00	10.00	10.00	<b>10.00</b>
<b>4. Percentage of quantity Processed Scientifically to the total availability of cottonseed for processing (%)</b>	<b>12.16</b>	<b>11.74</b>	<b>10.36</b>	<b>11.23</b>

Sources: -

As estimated by the Committee on Cotton Production and Consumption (COCPC), in its meeting held on 24-3-2023

The Committee was formed by the Government in September, 2020 replacing the Cotton Advisory Board (CAB)

According to Central Institute for Research on Cotton Technology (CIRCOT) (ICAR), Mumbai, presently scientific cottonseed processing is not attractive for small entrepreneurs as the returns are not very different from traditional processing to justify the additional investment though traditional processing results in national loss of valuable resources. Hence, there is need for providing incentives to this sector. Improve the cost of economics of scientific processing by conductive research. Central Institute for Research on Cotton Technology (CIRCOT) (ICAR) has been working in this direction.

It will be seen from the data presented in the table above that about 114.55 lakh tonnes of cottonseed will be available for processing during the current year i.e. 2022-23. As against the availability, an insignificant percentage that is 10% subject to scientific processing. Most of the cottonseed processed scientifically is by AICOSCA members, who are concentrated in the Southern States of Andhra Pradesh and Telangana. Based on the actual processing figures by these members, it seems, we would be processing scientifically about 12 lakh tonnes of cottonseed during the current year. The progress is fairly better than earlier year's figure of 5-6 lakh tonnes. Although the progress appears encouraging, nevertheless the situation is far from satisfactory even now, since hardly about ten percent of the cottonseed production is subject to scientific processing, despite AICOSCA's sincere efforts in various ways to propagate scientific processing.

### Some Facts About Scientific Processing of Cottonseed:

- i.) India is one of the oldest cotton producing country in the world along with Egypt, Sudan, Iran and some African countries, producing cotton between 350 lakh bales to near about 400 lakh bales per year (vide production data of 398 lakh bales in the year 2013-14)
- ii.) In the year 2005, cottonseed production was hardly 3,50,000 tonnes which crossed one crore tonnes mark in the year 2010-11
- iii.) However, as stated above, scientific processing of cotton seed is only about 10 to 12 lakh tonnes in the country
- iv.) While availability of cottonseed is much higher i.e. 112 to 118 lakh tonnes
- v.) Remaining seed is processed in an un-organised manner, i.e. traditional method which is primitive leaving oil in the cake of 5-6%, worth about several crores of rupees, which is a gross national wastage. Also losing other valuable by-products like linters and hulls in the traditional processing.

### Percentage of Products obtained from Scientific Processing of Cottonseed

- |   |            |
|---|------------|
| 1. Linters                              | - 5 – 8%   |
| 2. Hulls                                | - 20 – 25% |
| 3. Decorticated Cottonseed Cake or Meal | - 40 – 45% |
| 4. Cottonseed Oil                       | - 18 – 20% |

### **AICOSCA's Efforts So far In Propagating Scientific Processing :- Brief review of extension work done by AICOSCA**

The principal mandate of AICOSCA is scientific processing of cottonseed. In this context, AICOSCA seeks to propagate scientific processing of cottonseed to prevent recurring National loss of valuable cottonseed by-products like cottonseed oil, cotton linters, hulls etc. worth about `Rs. 7000/- crores to Rs. 8000/- crores every year. It seeks to promote the use of decorticated proteinous cottonseed extraction as animal feed in place of traditional wasteful use of whole cottonseed as well as undecorticated cottonseed oilcake and promote use of refined cottonseed oil (termed as Heart oil) which is healthy and cheaper cooking medium. This is achieved through education, extension work, publicity by way of issuing informative pamphlets/folders/ educative films etc. The specific extension/education work done by AICOSCA so far is briefly mentioned below:

#### **(i) Organising Seminars/Webinars on Cotton seed/Cotton seed by-products:**

Cotton seed by-products like linters, hulls, decorticated cotton seed meal, cotton seed oil, in association with other like-minded Associations/Government organizations like Central Institute for Research on Cotton Technology, (CIRCOT-ICAR), Mumbai, Solvent Extractors Association of India, Mumbai, CLFMA etc.

#### **(ii) Bringing out a Monthly Newsletter:-**

The Association brings out a Monthly Newsletter and keeps its members concerned, Government Departments, the subject matter specialists and others informed of the latest development regarding cotton in the country and the world, cottonseed production, prices of cottonseed and cottonseed products, policy issues and focuses attention on the problems of the scientific cottonseed processing industry and the measures needed for its development on modern lines. Although the Association's membership is only about seventy, about 100 copies of the monthly newsletter are circulated every month and distributed to non-members free of charge. This is the only publication in India devoted exclusively to cottonseed processing industry and is published every month.

#### **(iii) Publishing of Annual Report during Annual General Meeting:-**

The Association brings out Annual Report every year giving details of the development in cottonseed processing industry in India during the year. It gives details of the achievements of the industry, including adopting scientific processing of cottonseed, excellence in export of cottonseed by-products, problems being faced etc. The Report is circulated to all concerned, Government organisations and members of the trade and Industry.

#### **(iv) Award for Excellence in Domestic Production and Export:-**

To encourage scientific processing of cottonseed and larger use of by-products obtained during scientific processing, and promoting export of cottonseed by-products like linters, hulls, and cottonseed extraction the Association grants the following Awards every year.

1. Award for excellence in Export of Cottonseed Linters.
2. Award for excellence in Domestic sales of Cottonseed Extraction (Meal).
3. Award for excellence in Export of Hulls.
4. Award for excellence in Export of Cottonseed Extraction (Meal)-(Doc).

**(v) Almost a dozen of Papers on Scientific Processing of Cottonseed have also been presented by this Association at various Seminars organised by the cotton and vegetable oil industry from time to time.**

**(vi) Contribution to Development Fund for Propagating Scientific Processing of Cottonseed by prominent members of the Association.**

## **2. Constraints in Promoting Scientific Processing of Cottonseed:**

**According to Central Institute for Research on Cotton Technology (CIRCOT) (ICAR), there are certain constraints in promoting scientific processing of cottonseed and its by-products which are as under**

- i) Higher Capital Investment required as Machinery Costs are quite high
- ii) Seasonal Availability of the Raw Material (Cotton)
- iii) Products obtained i.e Linters, Hulls, Decorticated Cake mainly depend on export market hence price keep varying as well as income
- iv) Local market has more demand for undecorticated cake
- v) Lack of Government support. AICOSCA feels without proper government support the industry cannot grow.
- vi) Prices of the products obtained keep on varying depending on the demand and prices of competing products and therefore price realization keep on varying which is again a deterrent for investment in this sector.

## **3. Way Forward:**

Again according to Central Institute for Research on Cotton Technology (CIRCOT- ICAR),

- i) Presently returns from scientific processing not commensurate with additional Investment but as pointed out above traditional processing results in huge loss
- ii) Incentives needed from Government
- iii) Establishment of Forward Industrial Linkages such as chemical industry which can utilize linters.
- iv) Research & Development on Value Addition to Products obtained from scientific processing can improve profits.
- v) Educating the livestock farmers about the benefits of high protein decorticated cake/meal over undecorticated cake.

## **Ways and Means to change over from traditional to scientific processing of Cottonseed:**

In an Article contributed by Chairman, AICOSCA, Shri Sandeep Bajoria under the title

“Cotton seed: An emerging potential for meeting growing vegetable oil requirement.” Published by “India Society of oilseeds Research, Hyderabad as early as in the year 2009, the following deserves mention:

### **(I) Make scientific processing economically**

**viable:** As explained earlier, scientific processing of cottonseed does not appear economically viable at present. This is mainly because of ignorance of the cattle feeders which can be removed by launching an effective widespread extension campaign by the central and state extension agencies, in collaboration with the trade and industry. Since there is considerable gestation period for such campaign to yield desired result, some monetary incentive is needed in the initial years for change over from traditional to scientific processing. We do not need Government money for running our industry. However, monetary incentive may facilitate shifting from traditional to scientific processing expeditiously in the larger national interest.

### **(ii) Modernisation of processing machinery:**

Most of the cottonseed processed in the country is through traditional ghani or expeller. Machinery used even where cottonseed is processed in a scientific manner is also quite old and inefficient. Delinting and dehulling are two important steps in processing cottonseed in a scientific manner. Comparative cost of operation of the existing as well as modern machinery for delinting comes to about Rs.64.01 lakhs and 37.42 lakhs, respectively. This comparative cost analysis underlines the urgent need for replacing the existing age old processing machinery with modern cost –effective machinery which is now easily available in India through American collaboration.



**(iii) Delinting seed – Adoption of China**

**pattern:** It is reported that in China there is an in-built system of delinting cottonseed after ginning. This practice not only yields a large quantity of linters- prized raw material but also better quality of oil as well as higher recovery of oil. The bulk density of cottonseed (undelinted) is about 40% more than the delinted cottonseed. Thus, about 40% more seeds could be transported/ stored in the same area if seeds are delinted.

It is urgently necessary to adopt this practice of delinting seed immediately after ginning of cotton to reap the above benefits. This aspect can form an integral part of the existing scheme on modernization of ginning factories being executed by the Technology Mission on Cotton.

**(iv) Use of cottonseed extraction in compound cattle feed:**

**cattle feed:** We are passing through a fast changing era of animal nutrition when traditional cattle feeds are being replaced by the nutritionally balanced compound cattle feed. The compound feed manufacturers will do a yeoman service to the nation by using larger quantities of proteinous cottonseed extraction (Deoiled cake) in manufacture of compound cattle feed, fish feed and also poultry feed. It would encourage scientific processing of cottonseed and thereby reduce enormous national loss of cottonseed by-products caused by traditional processing. Initially, there may be problem of adequate availability. However, once the demand is generated production would chase the demand automatically.

**(v) Intensification of research on cottonseed:**

Most of the research work on cotton has so far been confined to cotton lint which forms only 1/3<sup>rd</sup> portion of the seed cotton. We need to have need-based research on cottonseed especially for enhancing the oil content, reducing gossypol contents etc. The specific aspects on which research need to be directed are as follows:

- i. Increase in seed yield/ha
- ii. Increase in oil percentage
- iii. Reduction in gossypol content

- iv. Increase in protein percentage
- v. Increase in lysine content
- vi. Better resistance of micotoxins
- vii. Use of cottonseed (meal) as protein food-based on the recent research in USA

**Conclusion**

It is said that in Cuba sugar is a by-product of sugarcane. This is a reward to the country which has utilized the by-products of sugar cane so effectively. India needs to learn from this example especially for cotton. By utilizing all the cottonseed by-products effectively, pressure on lint prices would be reduced without loss to the cotton farmers as well as the processors. Besides this win-win situation for all stakeholders in cotton, about 5 to 6 lakh tonnes of much needed cottonseed oil would be added every year to our vegetable oil production.



## OBITUARY

### SHRI. T. KANNAN JI

Committee Member of CITI and Chairman of the Thiagarajar Mills Madurai



*We want to honour the memory of a well-known businessman, Shri T. Kannan, who passed away on Tuesday, May 23, 2023. He was 70 years old. He was the important part of CITI since September 1, 1986, for 37 years.*

*Shri T. Kannan had been temple trustee (Thakkar) of the famous Sri Meenakshi Sundareswarar Temple since 2005.*

*As the chairman of the Thiagarajar Mills Madurai and president of the Thiagarajar Colleges, Shri Kannan was associated for many years with academic and industrial organisations including the Confederation of Indian Industry (CII) and the Southern India Mills Association (SIMA). He was a State Planning Commission member and was actively involved in many universities in Tamil Nadu, including Anna University Chennai.*

*He will always be remembered for his contribution to the Indian textile industry.*

### SHRI R.L. NOLKHA JI

Committee Member & Former Vice Chairman of CITI and Chairman, Nitin Spinners Ltd.



*In remembrance of the esteemed entrepreneur, Shri R.L. Nolkha Ji, who passed away on Saturday, August 12, 2023, at the age of 77, we seek to pay tribute to his enduring legacy.*

*Shri R.L. Nolkha Ji was the Committee Member at CITI, starting from June 29, 2005, until December 15, 2021. Notably, he assumed the role of Vice Chairman at CITI during the term of 2020-2021. From 2007 onward, he actively contributed to the initiatives of CITI-CDRA in Rajasthan. He was the Chairman of NITRA and RTMA.*

*His enduring memory shall forever be associated with his remarkable impact on the Indian textile industry, with a special focus on his significant contributions to the progress of CITI-CDRA in Rajasthan.*



11<sup>th</sup>

# Asian Textile Conference

August 31 - September 1, 2023

Radisson Blu, Coimbatore, India

2025 AND BEYOND – ASIA, THE GLOBAL HUB FOR TEXTILE MANUFACTURING & CONSUMERS

## PROGRAMME

DAY 1 – 31 <sup>st</sup> August	
0930 Hrs	Registration and Welcoming the Delegates
1015-1130 Hrs	<b>THEME SESSION:</b> 2025 and beyond – Asia, The Global Hub for Textile Manufacturing & Consumers
1145 –1300 Hrs	<b>SESSION I:</b> ENABLING RESILIENT TEXTILE & APPAREL SUPPLY CHAINS
1400 – 1515 Hrs	<b>SESSION II:</b> REGIONAL COOPERATION AND PARTNERSHIPS FOR SUSTAINABLE DEVELOPMENT
1520 – 1550 Hrs	<b>SESSION:</b> BRAND TALK
1600 – 1700 Hrs	<b>INTERACTIVE SESSION WITH SHRI PIYUSH GOYAL</b> Hon'ble Union Minister of Textiles, Commerce and Industry and Consumer Affairs, Food and Public Distribution, Government of India
DAY 2 – 1 <sup>st</sup> September	
1030 – 1130 Hrs	<b>SESSION III:</b> EMERGING TRENDS & OPPORTUNITIES IN THE MMF BASED VALUE ADDED TEXTILES INCLUDING TECHNICAL TEXTILES
1145 – 1300 Hrs	<b>SESSION IV:</b> COLLABORATING WITH INDIA: INVITING STATE PARTNERS WITH PM MITRA MEGA TEXTILE PARKS
1400 – 1500 Hrs	<b>SESSION V:</b> GREEN REVOLUTION: SCALING SUSTAINABLE TEXTILE & APPAREL MANUFACTURING
1510 – 1600 Hrs	<b>SESSION VI:</b> TRENDS, DEVELOPMENTS AND INNOVATIONS IN HOME TEXTILES
1605 – 1640 Hrs	<b>SESSION VII:</b> MANAGING FINANCIAL RISKS IN T&A BUSINESSES

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## CITI ACTIVITIES

### CITI ESG WEBINAR SERIES “ESG Reporting Frameworks”

The requisite need for a better understanding of ESG requirements in the textile and apparel space has been growing. The need has been growing not only because of expectations from the Western markets, EU and U SA, but with the recent SEBI and RBI guidelines it is now relevant for the listed textile companies and the supply chain partners of those companies. With a long value chain, the implications for the input suppliers are also growing.

Recognizing the importance of this, CITI has initiated the ESG webinar series. The first two webinars were to understand; why the industry now needs to understand them and follow the ESG norms and the opportunities therein. Today's webinar on “ESG Reporting Frameworks”, the third in the series was focused more on the reporting frameworks and reporting requirements with the view to give the industry a perspective on the various reporting frameworks that are presently available.



*Mr. Shankar Venkateswaran, Managing Partner, Sustainability Integration and Co-founder of Ecube presenting on ESG reporting formats*

**The webinar detailed the frameworks under Global Reporting Initiative, UN Global Compact, National Guidelines on Responsible Business Conduct, Business Responsibility and Sustainable Reporting, etc.**

The presentation was made by Mr. Shankar Venkateswaran, Managing Partner, Sustainability Integration and Co-founder of Ecube.

ECube as a knowledge partner for today's webinar emphasized on understanding various reporting frameworks and also the relevance of these frameworks for the different kinds of requirements that the industry may have for reporting, based on the region they work with, the buyers they work with, and the products they are working on.

Observations were made by industry representatives like TRIBURG, NEW TIMES GROUP, wherein NEW TIMES GROUP highlighted the concerns of the users specifically with regard to the plethora of requirements and the cost requirements as there is still no clarity on how the cost has to be

shared between the buyers and the users. Triburg, as a facilitator to several exporting unit also highlighted the challenges they observed of the suppliers

CITI will continue to hold these workshops to dive deeper into the various aspects of sustainability ESG requirements and reporting frameworks with the objective of capacity building of the Textile and Apparel industry, especially the MSME sector.

CITI invite suggestions from the industry on the areas they need further discussions on.



*Ms. Chandrima Chatterjee, Secretary General, moderating the session*

## CITI ACTIVITIES

### CITI's textile and apparel CEOs delegation at ITMA, Milan

CITI took a delegation of textile industry members to ITMA 2023, the world's largest textile and garment technology exhibition in Milan, Italy held from June 8th to June 14th, to understand the emerging trends in technology. The show had over 1,700 exhibitors from 47 countries and highlighted solutions for advanced materials, automation and the digital future and sustainability and circularity under the show theme, *Transforming the World of Textiles*



*Smt. Darshana Vikram Jardosh, Hon'ble Minister of State for Textiles & Railways addressing Indian delegates to ITMA, during a dinner hosted by HE Dr. Neena Malhotra, Ambassador of India to Italy.*



*Mr Rakesh Mehra, Deputy Chairman CITI addressing guests at the inauguration of Colourjet Pavillion*

Coinciding with ITMA'23, the Confederation of Indian Textile Industry (CITI), one of the leading business chambers representing T&C value chain, organised the Indian Textile & Apparel CEOs Delegation with the participation of decision-makers of leading textiles and apparel companies of India. The CITI delegation at ITMA 2023 represented a dynamic collaboration between Indian textile and apparel CEOs, fostering innovation and driving sustainable growth in the industry. With a focus on digitalization and sustainability, the delegation aimed to seize new opportunities and strengthen international partnerships.

The delegation witnessed the support and presence of esteemed dignitaries including Smt. Darshana Vikram Jardosh, Hon'ble Minister of State for Textiles & Railways, Govt. of India, HE Dr. Neena Malhotra, Ambassador of India to the Republic of Italy, Mr. Rohit Kansal, IAS Additional Secretary, Ministry of Textiles, Government of India.



*Smt. Darshana Vikram Jardosh, Hon'ble Minister of State for Textiles & Railways addressing one-on-one investors meeting*

## CITI ACTIVITIES

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Smt. Darshana Vikram Jardosh, Hon'ble Minister of State for Textiles & Railways, was warmly welcomed by the ITMA organizers on 8th June. Hon'ble Minister inaugurated the 'Colorjet Pavilion' and embarked on an engaging exhibition tour, meeting with various exhibiting companies at their respective booths. Exhibition tour by the delegation included visit to Lakshmi Machinery Works, Rieter, Trützschler, Picanol, TEXCOMS, Andritz, Dilo, etc. and witnessed the state-of-the-art technology showcased at their booths.

The Minister also chaired productive one-on-one investors meeting with Oerlikon, ITEMA Group, LOEFPE, SETEX, Sedo, Loptex, Turkish Machinery, Datatex Consulting, Neuenhauser Maschinenbau, Brückner, Mayer & Cie, Aquafil Group, Ecotton, etc. to explore potential investment opportunities and collaborations.

### **Seminar on "Digital & Sustainable Transformation of The Textile Industry at ITMA 2023"**



On 9th June, a thought-provoking panel discussion on "Digital & Sustainable Transformation of The Textile Industry" was organized by the Confederation of Indian Textile Industry (CITI) with the support of CEMATEX - The European Committee of Textile Machinery Manufacturers.

Smt. Darshana Vikram Jardosh, Hon'ble Minister of State for Textiles & Railways, Govt. of India Inaugurated the Session and address the Delegates. HE Dr. Neena Malhotra, Ambassador of India to the Republic of Italy, Mr. Rohit Kansal, IAS Additional Secretary, Ministry of Textiles, Government of India addressed the delegates. Mr. Ernesto Maurer, President of CEMATEX, moderated the session.

The esteemed panellists including Mr. Rakesh Mehra, Deputy Chairman of CITI, Mr. Alex Zucchi, President of ACIMIT (Association of Italian Textile Machinery Manufacturers), Mr. H.K. Agarwal, Managing Director of Grasim Industries Ltd, and Mr. Frank Vandeputte, CEO of Valtech Group gave insights on the Textile Industry's digital and sustainable transformation and discussed on the latest technological advancements and business trends, investment opportunities in emerging markets, technological collaborations, etc.



## CITI ACTIVITIES

### CITI's Textile and apparel delegation to Denmark



*Indian Delegates visited the Denmark Textile Industries*

Confederation of Indian Textile Industry (CITI) has joined hands with Innovation Centre Denmark, Confederation of Danish Industry and lifestyle and design cluster Denmark for creating awareness on production and development of sustainable Textiles under the purview of Indo-Danish Green pact.

Under this collaboration, CITI has organised a series of awareness workshops on the EU legislation on Environmental Social Governance (ESG) and their impact on Indian Textile Industry.

CITI has also facilitated B2B meetings and factory visits in India for the Danish Textile Sourcing Companies in May 2023.

The lifestyle and design cluster Denmark, in collaboration with Innovation Centre Denmark and Confederation of Danish Industry hosted an Indian delegation of textile industry representatives for better understanding of the developments in the Danish textile industry with regard to growing need for sustainable manufacturing and sourcing.

CITI was happy to facilitate this delegation aimed at greater engagement between danish brands and Indian textile manufacturers and accelerate collaboration on circularity in the indo danish textile trade. The three day delegation from 21st to 24th June 2023, helped the delegates understand the development in the area of Green Textiles and explore market options.

The lifestyle and design centre Denmark is steering a Danish Sector collaboration in textiles with several Danish textile industries and brands signatories to the three goals of

- By 2030, all textile and clothing from Danish companies will consist of at least 40% recycled material
- Create common circular design requirements and be part of optimal circular loops
- Encourage circular business models

All these goals require creation of supply chain partners who can align their business models to these goals.

DM&T, the Danish fashion and textile association with over 350 member companies in fashion, home textiles, furniture and interior products is supporting this initiative. The delegation had detailed interactions with these organisations to understand their action plan and discuss areas of collaborative work.

The delegation visits included visit to some of the leading Danish brands like DK, JBS, Knowledge cotton apparel, sorting and recycling units, universities and business support institutions working in this area.

## CITI ACTIVITIES

### CITI joins ILO and KOICA organised study tour to Korea with the aim to promote sustainable enterprises in India



*Indian delegates during the visit to Korea International Cooperation Agency (KOICA)*

International Labour organisation (ILO) in association with Korea International Cooperation Agency (KOICA) and supported by Korea Small Business Institute (KOSI) had organised a study tour to Republic of Korea from 3-7 July 2023 under a cooperation project titled “Promoting Sustainable Enterprises in India” (PSEI). The objective of this study tour was to understand the initiatives at institutional and industry level to accelerate sustainability in their value chains.

Under this tour discussions on making an ecosystem for promoting sustainable textile enterprises in India and support capacity building efforts of Indian SME's and start-ups for better

integration with Global value chain was held with several government and industry organizations like Korea International Cooperation Agency (KOICA) which funds and supports development program like Promoting Sustainable Enterprises in India (PSEI), Korea Small Business Institute (KOSI) which works on promoting start-ups, Tech Incubator Program for Start-ups (TIPS) which is actively working on entrepreneurship and incubating start-ups, Korea Federation of Textile Industries (KOFOTI), Youth Start-up Academy (YSA), Korea SMEs & Start-up's Agency (KOSME), Ministry of MSME and Start-ups, Ministry of labour and Korea Textile Development Institute (KTDI) were held.

The program entailed key meetings with the Korean policy makers especially from the Ministry of SME's, visit to industrial clusters and other MSME facilities, visit to garment and textile companies with the objective of sharing the learning and experiences.

The India delegation was headed by Ms Prajakta Verma, Joint Secretary, Ministry of Textiles, Government of India and joined by senior representatives from the central Ministry of MSME, Labour & Employment, state ministries and MSME enterprises from the state of Andhra Pradesh and Odisha and team ILO, which are part of the PSEI project.

Secretary General, Confederation of Indian Textile Industry was also invited to join this delegation.

The participants had fruitful discussions on initiatives concerning productivity improvement of MSME and entrepreneurship trainings, with special focus on start-ups, innovation and ESG aspects.

This study tour was aimed at promoting sustainability in the MSME value chain in India and provide ideas and opportunities for greater institutional partnerships between the relevant organizations in the two countries.



*From left to right Vice Chairman, KOFOTI. Ms. Prajakta Verma, Joint Secretary, Ministry of Textiles, Government of India, and Ms. Sudipta Bhadra, Chief Technical Advisor, (PSEI), ILO Ms. Chandrima Chatterjee, Secretary General, CITI exchange felicitations during the meeting.*



*Conference and photo session during visit to Korea Federation of Textile Industries (KOFOTI)*



*Delegates meeting with Mr. Amit Kumar, Ambassador of India to Korea*

## CITI PRESS RELEASES

### "TEXTILE INDUSTRY ISSUES AND OUTLOOK"

**New Delhi, Wednesday, 23 August 2023:** The Confederation of Indian Textile Industry (CITI) organized a press meeting on 23rd August 2023 to deliberate on the issues concerning the hindrances in the growth of the T&A industry vide the topic "Textile Industry Issues and Outlooks". This meet was organized in association with the South India Mills Association (SIMA), The Cotton Textiles Export Promotion Council (TEXPROCIL), Synthetic & Rayon Textiles Export Promotion Council (SRTEPC) and Apparel Export Promotion Council (AEPC).

The industry shared its outlook for the coming months as also the reasons for the stagnation in production and trade in the past few months. The industry is very confident that the inherent strengths of India's Textile Industry- Its good raw material base, skilled workforce, improved global positioning, and growing strategic alliances. These will help India bounce back strongly to become a US\$ 350 bn industry in the coming years. The government of India is taking considerable policy measures to strengthen the Indian Textile & Apparel Sector. The presentation made during the Meet is enclosed herewith. A summary of the views expressed in this meeting by the respective association chairman is as below:

"Government should consider removing the 11% import duty from the cotton, if not all, then at least from the Extra Long Staple (ELS) cotton till the time it has adequate domestic availability. At present ELS is being imported to make high quality Fabric and Apparels which are meant for Export purpose. ELS imports accounts to only 5-7% of India's total cotton production which under most optimistic scenario can go to a maximum of 15% only and hence will not affect the interest of domestic cotton cultivators." He also said "Textile industry is facing financial stress due to slow demand and price volatility of inputs in the recent past and Government is requested to come up with adequate financial measures to provide relief to the industry including a one-year moratorium for repayment of the principal amount and Converting three-year loans under ECLGS into six-year term loans"

**Mr. T Rajkumar, Chairman, CITI**

"As far as exports of cotton textiles is concerned, we have amplified the need to ensure the supply of raw material and capacity building for better productivity and yield. There are a set of projects approved by the Ministry of Textiles, Government of India to increase the production and quality of cotton in India. Industry is also pursuing the Government for TMC 2.0 and our emphasis is more on seed technology as improvised seeds will increase the income of the farmer."

**Mr. Sunil Patwari, Chairman, Texprocil**

"For improving the quality and production of cotton there should be a total embargo on the illegal seeds. In order to provide a level playing field and enabling the Industry to procure cotton as per International rates, Government should remove duty from cotton at least for six months during April to September. It's the right time for the Government to reduce Hank Yarn Obligation to provide relief to spinning sector."

**Mr. Ravi Sam, Chairman, South India Mills Association**



“We have legendary growth opportunity in India and we are confident that we will be able to achieve the target market size of USD 350 billion including USD 100 billion exports by 2030. Achieving this target is not a difficult task provided we all policymakers and stakeholder join hands to bring more investment in the sector. Government should come up with PLI 2.0 with reduced threshold and wider product basket, so that even the MSME can be benefitted from the scheme. QCO's is a welcome step but they must be applied judiciously and should not be centred at one point of value chain which at present is Fibre. Government should start implementing the QCOs from the Garmenting Stage as it is the ultimate product used directly by the consumers”

**Rakesh Mehra, Dy Chairman, CITI**

“We need to have more players in manmade fibre textile exports in addition to the existing exporters. There is a need of improvised ATUF scheme, and PLI 2.0 to be implemented at the earliest so that more players from the manmade fibre sectors can enter the exports. We request Government to notify more HS codes for Technical Textiles to cover the entire product range and industry is keenly looking on the forthcoming FTA's with EU, UK and Canada.”

**Mr. A. Ravikumar, Executive Director, SRTEPC**

## ADOPTING ESG NORMS A WAY FORWARD FOR THE INDIAN TEXTILE INDUSTRY – CITI

**New Delhi, Thursday, 04 May 2023:** Confederation of Indian Textile Industry (CITI) organised an awareness webinar on Climate Fit – an introduction to sustainability metrics (ESG) for the textile sector. To help the textile sector better understand these requirements, CITI will be organising a series of awareness workshops in the coming days. The first in the series was organised today with ESG experts, Ms. Namrata Rana, Director, Strategies & Brand, Futurescape and Professor Utkarsh Majmudar, Member, Board of Directors, IIM Raipur.

Ms. Chandrima Chatterjee, Secretary General, CITI in her opening remarks stated that the Indian textile industry which is one of the largest contributors to the economy and the second-largest employment provider to the youths must align itself with ESG principles for the socio-economic growth of the country.

She further stated that the Indian textile sector needs to keep pace with the global concerns on ESG issues, given it contributes significantly to the environmental pollution, with significant carbon emissions, water consumption, and chemical usage. By adopting ESG principles, textile companies can not only substantially reduce the environmental impact by reducing waste, minimizing resource consumption, and using sustainable materials but also effectively take care of the labour issues and human rights.

She pointed out that today, consumers have become increasingly conscious about sustainability and ethical issues and support companies that demonstrate responsible and sustainable practices in products making. Hence, adopting ESG norms, textile companies can improve their brand reputation and appeal to a growing market of environmentally and socially conscious consumers across the globe.

Ms. Namrata Rana, Director (Strategy & Brand) at Futurescape in her presentation stated that the fashion and textile business worldwide was rapidly transforming and sustainability issues were taking centre stage and impacting trends, manufacturing and consumption. She further stated that what worked in the past may not necessarily work in the future, hence, there was a growing need for the companies to change their business strategies and adopt more sustainable business model which efficiently take cares of environmental, social and governance aspects of the business.

She stated that the Indian companies should align its goal with the Prime Minister's statement that "By 2030 India will increase the share of renewable energy in total energy to 50% and Net Zero Emission by 2070" which was announced at the COP26 – UN Climate Change Conference in Glasgow. To achieve the PM's vision, she stated that 58% of top companies in 2022 reported to aspire to be either carbon neutral or achieve net zero. She further revealed that 80% of India's top 100 companies had shared their decarbonization plans in 2022 and elaborated on the ways how can Indian companies adopt to the climate change.

Prof. Utkarsh Majmudar centred his presentation around understanding sustainability metrics. He elaborated in detail about the 7 Modules of Climate Fit which entailed step-by-step guide to help companies to reduce emissions across their businesses which were 1) Climate Strategy & Governance, 2) Climate Action for Operations, 3) Reducing Emissions in Supply Chain, 4) Design for Net Zero, 5) Financing Net Zero Transition, 6) Engaging People & Communities, and 7) Net Zero Storytelling.

He described that Net Zero refers to achieving an overall balance between emissions produced and emissions taken out of the atmosphere. He further elaborated on Carbon Markets, Carbon Tax, Scope Emissions and the seven steps to execute a great energy efficiency strategy that can help the companies to achieve their sustainability goals.

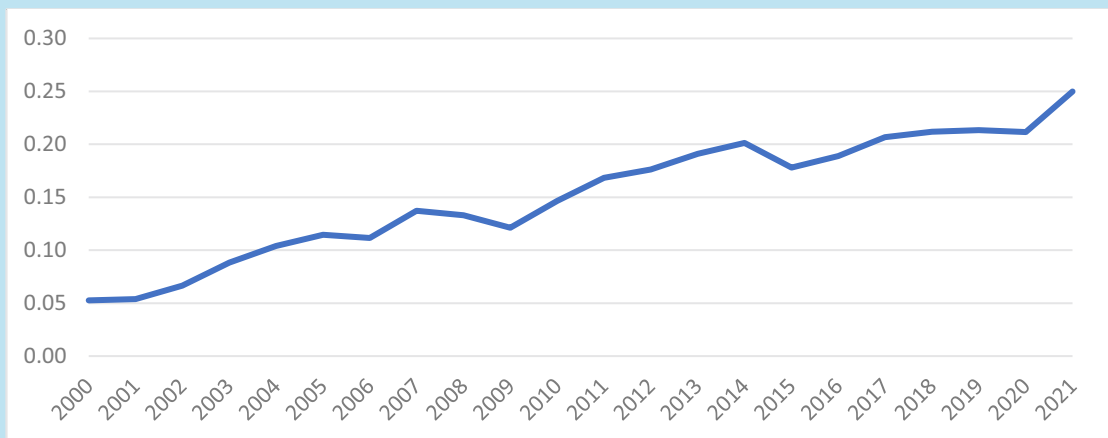
In their concluding remarks, the Secretary General stated that at the moment, ESG considerations are not mandatory for the companies operating in the textile and apparel domain, however, it is widely being recognized as a key factor in the industry's long-term sustainability and success in the international market. The companies that have adopted ESG practices are better positioned to meet the changing demands of consumers, investors, and other stakeholders, and to thrive in a rapidly evolving business landscape. Hence, more and more companies should set their sustainability targets to have better visibility in the international market.

## NEW ZEALAND

### A Market with a Huge Potential for India's Textile Exports

With a GDP of about US\$ 0.25 trillion in 2021, New Zealand (NZ) was the 52nd largest economy in the world and is one of the most globalized economies in the world. As per the estimates of the International Monetary Fund (IMF), NZ's nominal GDP is expected to reach the US\$ 0.26 trillion mark during 2023.

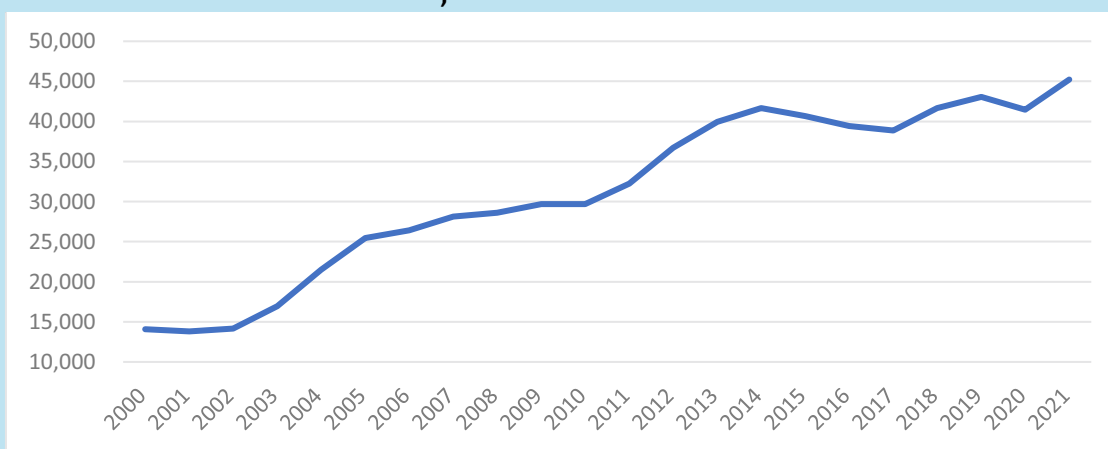
**GDP (Current US\$) of New Zealand (US\$ Trillion)**



Source: World Bank and CITI Analysis

NZ is one of the Developed and High-Income Economies. The Gross National Income of NZ has increased at a CAGR of about 6% during the last two decades and is expected to rise further at a faster rate owing to favorable economic conditions. High income makes NZ a favorable market for Textile Products.

**Gross National Income (GNI) Per Capita, of New Zealand (US\$)**



Source: World Bank and CITI Analysis  
GNI is as per the Atlas method (Current US\$)



## Overview of the Global Textile & Apparel Trade of New Zealand

NZ is a net importer of Textile and apparel (T&A) products. During 2022, New Zealand exported T&A commodities worth about US\$ 0.46 bn to the world which have decreased at a CAGR of about 6.1% during 2018-2022. On the other hand, during 2022, NZ imported T&A commodities worth about US\$ 2.28 bn from the world which have increased at a CAGR of about 4.8% during 2018-2022.

### Total Textile & Apparel (T&A) Trade of New Zealand (US\$ Bn)

Year	Exports	Imports	Trade Balance
2018	0.59	1.89	-1.30
2019	0.52	1.87	-1.34
2020	0.40	1.76	-1.35
2021	0.49	2.23	-1.73
2022	0.46	2.28	-1.82
CAGR	-6.1%	4.8%	

Source: ITC Trade Map & CITI Analysis

Category-wise analysis shows that Apparel was the largest imported T&A category by NZ from the world and had a share of about 59.9% in NZ's total T&A imports from the world during 2022 followed by Home Textiles with a share of about 13.5% during the same time frame.

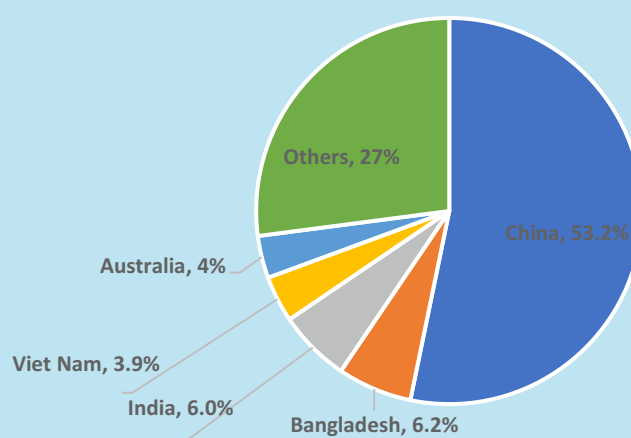
### Category Wise Imports of T&A by NZ in 2022 (US\$ Mn)

Row Labels	2022	Share 2021
Fibre	31.9	1.4%
Filament	39.5	1.7%
Yarn	15.0	0.7%
Fabric	172.1	7.6%
Apparel	1,363.2	59.9%
Home Textiles	307.6	13.5%
Others	347.9	15.3%
Total	2,277.2	100.0%

Source: ITC Trade Map & CITI Analysis

China was the leading supplier of T&A commodities to NZ and had a share of about 53.2% in NZ's total T&A imports from the world during 2022 followed by Bangladesh and India with a share of about 6.2% and 6.0% respectively. The top 5 countries accounted for about 73% of NZ's total T&A imports from the World during 2022.

### Share of Top Suppliers of T&A Commodities to New Zealand during 2022



Source: ITC Trade Map & CITI Analysis

The top 10 T&A commodities imported by NZ constitute about 53.2% of NZ's total T&A imports from the world during 2022. Import of HSN 6307 has shown the maximum CAGR of about 28% during 2018-2022 while HSN 6204 was the highest imported T&A commodity by NZ from the world during 2022.

#### Imports of Top 10 T&A Commodities by NZ (US\$ Mn)

HS Code	Commodity	2018	2019	2020	2021	2022	CAGR	Commodity Wise Share in 2022
6302	Bedlinen, table linen, toilet linen and kitchen linen of all types of textile materials	24.7	23.8	23.7	31.2	30.2	5.2%	22.0%
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, etc.	7.1	8.2	7.1	10.9	12.6	15.5%	9.1%
6109	T-shirts, singlets and other vests, knitted or crocheted	4.5	4.9	5.1	6.9	8.5	17.5%	6.2%
5702	Carpets and other textile floor coverings, woven, not tufted or flocked, whether or not made	6.6	6.1	5.5	8.7	7.0	1.7%	5.1%
6305	Sacks and bags, of a kind used for the packing of goods, of all types of textile materials	4.6	5.0	3.9	7.3	6.8	10.2%	4.9%
5603	Nonwovens, whether or not impregnated, coated, covered or laminated,	2.0	3.1	2.7	5.4	4.8	24.2%	3.5%
6111	Babies' garments and clothing accessories, knitted or crocheted (excl. hats)	2.1	3.1	3.5	6.0	4.0	18.4%	2.9%
5310	Woven fabrics of jute or of other textile bast fibres of heading 5303	2.4	1.9	1.2	2.9	3.8	12.4%	2.8%
5402	Synthetic filament yarn, incl. synthetic monofilaments of < 67 decitex	4.3	5.9	3.3	4.0	3.7	-3.2%	2.7%
6104	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, etc.	3.1	4.0	2.4	3.2	3.4	2.6%	2.5%

Source: ITC Trade Map & CITI Analysis

#### Textile & Apparel Trade Between India and New Zealand

India was the 3rd largest supplier of T&A commodities to NZ in 2022. During 2022, NZ imported T&A commodities worth US\$ 137.4 bn from India which have increased at a CAGR of 17.2% during 2018-2022.

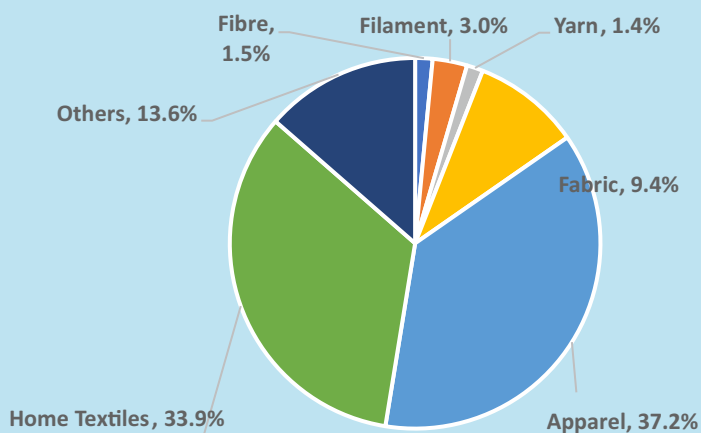
#### NZ imports of T&A from India (US\$ Mn)

Row Labels	2018	2019	2020	2021	2022	CAGR
Fibre	0.7	1.4	0.9	1.6	2.1	29.2%
Filament	4.5	6.1	3.6	4.4	4.1	-2.0%
Yarn	1.2	1.5	1.4	2.1	2.0	13.4%
Fabric	11.4	10.4	7.3	13.1	12.9	3.2%
Apparel	32.6	37.6	33.0	48.1	51.2	12.0%
Home Textiles	39.3	37.9	36.2	51.0	46.5	4.3%
Others	10.9	12.7	10.9	18.7	18.7	14.4%
Grand Total	100.5	107.6	93.2	138.9	137.4	8.1%

Source: ITC Trade Map & CITI Analysis

Category-wise analysis shows that apparel was the largest imported T&A commodity by NZ from India and accounted for about 37.2% of total T&A imports by NZ from India followed by Home-Textiles with 33.8% share.

**Category Wise Share of NZ imports of T&A from India**



The top 10 commodities imported by NZ from India accounted for about 61.8% of NZ's total T&A imports from India during 2022. HSN 6302 was the largest imported T&A category by NZ from India which accounted for about 22% of NZ's total T&A imports from India.

Source: ITC Trade Map & CITI Analysis

**Top 10 T&A Imported commodities by NZ from India (US\$ Mn)**

HS Code	Commodity	2018	2019	2020	2021	2022	CAGR	Commodity Wise Share in 2022
6302	Bedlinen, table linen, toilet linen and kitchen linen of all types of textile materials	24.7	23.8	23.7	31.2	30.2	5.2%	22.0%
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, etc.	7.1	8.2	7.1	10.9	12.6	15.5%	9.1%
6109	T-shirts, singlets and other vests, knitted or crocheted	4.5	4.9	5.1	6.9	8.5	17.5%	6.2%
5702	Carpets and other textile floor coverings, woven, not tufted or flocked, whether or not made	6.6	6.1	5.5	8.7	7.0	1.7%	5.1%
6305	Sacks and bags, of a kind used for the packing of goods, of all types of textile materials	4.6	5.0	3.9	7.3	6.8	10.2%	4.9%
5603	Nonwovens, whether or not impregnated, coated, covered or laminated,	2.0	3.1	2.7	5.4	4.8	24.2%	3.5%
6111	Babies' garments and clothing accessories, knitted or crocheted (excl. hats)	2.1	3.1	3.5	6.0	4.0	18.4%	2.9%
5310	Woven fabrics of jute or of other textile bast fibres of heading 5303	2.4	1.9	1.2	2.9	3.8	12.4%	2.8%
5402	Synthetic filament yarn, incl. synthetic monofilaments of < 67 decitex	4.3	5.9	3.3	4.0	3.7	-3.2%	2.7%
6104	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, etc.	3.1	4.0	2.4	3.2	3.4	2.6%	2.5%

Source: ITC Trade Map & CITI Analysis



## Way Forward:

The textile and apparel industry in New Zealand is a significant contributor to the country's economy. It encompasses a wide range of activities including clothing manufacturing, textile production, design, retail, and more. The industry has evolved over the years to focus on sustainable and ethical practices, which align with New Zealand's commitment to environmental conservation and social responsibility.

NZ is home to a number of fast fashion brands, high-end boutiques, as well as local designer stores. Moreover, online retail has been growing steadily in the NZ thus making it a lucrative market for T&A products.

India has been able to get a higher UVR in NZ as compared to its world's average UVR thus NZ's T&A market poses a strong opportunity for India. At present, India has a limited share in NZ's total T&A imports and the major market share is occupied by China. However, considering the manufacturing capabilities of India, below are certain product categories for which India can increase its market share in NZ

### Potential Textile Export Categories for India to NZ (Value in US\$ Mn)

HS Code	Product label	NZ Imports from the World in 2022	NZ Imports from India in 2022	India's Share	India's Exports to the World in 2022
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, etc	201.6	12.6	6.2%	3,096.0
6203	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches,	143.3	2.9	2.0%	1,119.6
6109	T-shirts, singlets and other vests, knitted or crocheted	140.2	8.5	6.1%	2,540.4
6302	Bedlinen, table linen, toilet linen and kitchen linen of all types of textile materials	115.2	30.2	26.2%	2,037.7

Source: ITC Trade Map & CITI Analysis

# SPECIAL PROJECT ON COTTON OF ICAR-CICR

Ministry of Agriculture & Farmers Welfare has approved a Special Project on Cotton of ICAR-CICR titled ‘Targeting Technologies to agro-ecological zones – large scale demonstrations of best practices to enhance cotton productivity’ under NFSM during 2023-24. Ministry of Textiles is also part of the review and steering group of the project. The objective of the project is to boost cotton productivity in a cluster based and value chain approach in Public Private Partnership (PPP) mode with the participation of ICAR-CICR, Nagpur; CITI & SIMA; Seed Industry Associations (NSAI and FSII); Extension partners (Cotton Development and Research Associations of CITI and SIMA; Agricultural Technology Application Research Institutes & their Krishi Vigyan Kendras); State Departments of Agriculture-ATMA), Textile partners and Cotton Corporation of India (CCI).

The Pilot Project comprises of three technologies namely High-density planting system, Closer Spacing planting system and Production technology for ELS cotton.

The objective of Special project is enhancement in productivity of rainfed cotton on marginal soils from 350 kg lint/ha to 750 kg lint/ha, under HDPS in drought prone area to 600 kg lint/ha; and under closer spacing from 600 to 1000 kg lint/ha, and extra-long staple cotton to 750 kg lint/ha through improved package of practices.

CITI CDRA is allotted with 3160 ha areas across Rajasthan, Maharashtra and Madhya Pradesh from the total 15358 ha project area for extension activities with HDPS, Closer spacing and ELS interventions **(State wise Details given in Annexures)**.

In order to have a better monitoring and implementation of the project activities, Ministry of Agriculture has also mandated CITI to develop a web-based portal/mobile application for the Pilot Project on Cotton and has also formed a Sub Group for the same which is chaired by the CITI-Chairman Shri T. Rajkumar and have representatives from Industry, Ministry of Agriculture and Ministry of Textiles.

## Objective of the Portal/Mobile Application

- Management and monitoring of the pilot project on cotton development in identified clusters.
- Given the project will be rolled out in DBT mode, monitoring the deliverables for approvals and transfer of funds.
- Capturing good/ best practices for benefit the farmers and project efficacy.

The portal / mobile application is in development phase with many functionalities already developed and some under in development and is expected to be rolled out soon after the due diligence from the concerned Ministry.

## RAJASTHAN

### *Annexure I*

- CITI CDRA is allotted 240 ha area with Closer spacing technology and a subsequent addition of 200 ha ELS from adjoining Madhya pradesh area for the Pilot Project in Rajasthan.
- We achieved 100% of our target area, covering 10 clusters in 3 districts namely Bhilwara, Chittorgarh and Rajasmand with a total of 600-woman farmers for closer spacing and an approx of 500 farmers for ELS covering one Cluster of Banswara district.
- CITI CDRA has given full importance to women empowerment through Pilot Project by selecting 100 percent woman farmers for Closer spacing area who are working as labour in MANREGA project of Government of India.
- Apart, CITI set 60 demonstrations on Mycorrhiza in 60 acres of Pilot Project (6 acres/cluster) and 50 demonstrations on Agnihotri in 50 acres of Pilot Project as good practices.
- CITI made available first dose of Mepiquat chloride (PGR) on credit of 2 months through HINDUSTAN SEEDS AND PESTICIDES for application at 55-60 days after sowing for the project farmers.



Closer spacing cotton crop

PGR distribution

## MAHARASHTRA

## Annexure II

- CITI CDRA is allotted with 400 ha area for HDPS technology in the pilot project Maharashtra.
- We have achieved 351 ha from the target area, covering 14 clusters of 2 districts namely Nagpur and Wardha with a total of 515 number of farmers.
- For 336.4 ha area, CITI CDRA supplied seeds to farmers through ANKUR seeds & RASI seeds on credit of 2 months.
- Seeds were taken on credit because the recommended seed rate for the project is 15 packets/ha but due to limitation in growing nature small & marginal farmers in area which is usually only 5 or 6 packets/ha so farmers declined/incapability to spend on additional CICR suggested seed quantity therefore CITI has to make the seeds available to farmers on credit for the accomplishment of project.
- Later under instruction of CICR, CITI CDRA covered the remaining 49 hectares with Closer spacing. Therefore, in Maharashtra also CITI CDRA achieved 100 % of allotted target area (400 ha) of Pilot Project.





*Seed distribution*

*HDPS*

### MADHYA PRADESH

### Annexure III

- CITI CDRA is allotted with 2040 ha area for ELS - covering 12 clusters in 3 districts namely Jhabua, Ratlam and Dhar. And for closer spacing 480 ha area in 10 clusters of 2 districts namely Alirajpur and Dhar. So, a total of 2520 ha area in Madhya Pradesh under Pilot Project.
- Banswara district of Rajasthan added to the project under guidance of CICR for ELS to meet the target due to limitation in availability of approved seeds in the State and CITI CDRA have achieved almost 98% of the target area allotted with Closer spacing and 100% area of ELS interventions.
- 1600 packets of Shakti BT (Closer spacing) and 1363 packets of SIMA Platinum (ELS) purchased by CITI CDRA on credit from SIMA. 1000 packets of ELS seeds (Bumbac) arranged through RASI and 150 packets through MAHYCO.
- CITI CDRA team conducted 3 to 4 surveys due to ELS seeds shortage and continuous requirement for replacements of farmers - with approximately 3000 farmers each survey for data collection consisting personal details, bank details and farmers details.



# CITI ANALYSIS OF EXPORTS AND IMPORTS OF T&A FOR JULY 2023

## Monthly Export Updates of Textile and Clothing (Value in USD Mn.)

Export category	July-22	July-23	% Change	Apr-July'22	Apr-July'23	% Change
<i>Cotton Yarn/Fabs./made-ups, Handloom Products etc.</i>	946.48	1,009.1	6.62%	4,110.67	3,767.83	-8.34%
<i>Man-made Yarn/Fabs./made-ups etc.</i>	435.81	390.25	-10.45%	1,764.10	1,551.12	-12.07%
<i>Jute Mfg. including Floor Covering</i>	39.17	29.35	-25.07%	169.88	123.93	-27.05%
<i>Carpet</i>	117.77	111.44	-5.37%	499.83	437.6	-12.45%
<i>Handicrafts excl. handmade carpet</i>	156.03	122.96	-21.19%	620.44	528.9	-14.75%
<b>Sub-Total Textiles</b>	<b>1,695.26</b>	<b>1,663.10</b>	<b>-1.90%</b>	<b>7,164.92</b>	<b>6,409.38</b>	<b>-10.54%</b>
<b>Apparel</b>	<b>1,381.14</b>	<b>1,141.17</b>	<b>-17.37%</b>	<b>5,871.80</b>	<b>4,835.88</b>	<b>-17.64%</b>
<b>Textile and Clothing</b>	<b>3,076.40</b>	<b>2,804.27</b>	<b>-8.85%</b>	<b>13,036.72</b>	<b>11,245.26</b>	<b>-13.74%</b>
<b>All Commodity</b>	<b>38,335.81</b>	<b>32,254.36</b>	<b>-15.86%</b>	<b>1,59,318.26</b>	<b>1,36,218.47</b>	<b>-14.50%</b>
<b>% of T&amp;C in Total Exports</b>	<b>8.02%</b>	<b>8.69%</b>		<b>8.18%</b>	<b>8.26%</b>	

Source: Press Information Bureau

## Monthly Import Updates of Textile and Clothing (Value in USD Mn.)

Import category	July-22	July-23	% Change	Apr-July'22	Apr-July'23	% Change
<i>Cotton Raw &amp; Waste</i>	193.86	88.72	-54.24%	468.46	287.19	-38.69%
<i>Textile yarn fabric, made-ups</i>	267.04	201.15	-24.67%	930.42	719.74	-22.64%

Source: Press Information Bureau

# QUICK ESTIMATES OF IIP FOR TEXTILE AND CLOTHING SECTOR (T&C): JUNE 2023



## T&C in Index of Industrial Production (IIP): Growth Rates (% , Y-o-Y)

Sector	Weights	Index			Cumulative Index		
		Jun-22	Jun-23	% Change	Apr- Jun-22	Apr- Jun-23	% Change
General	100	138.3	143.4	3.7	136.9	143.0	4.5
Manufacture of textiles	3.2913	107.8	107.5	-0.3	111.1	107.4	-3.3
Manufacture of wearing apparel	1.3225	156.9	120.3	-23.3	142.9	108.2	-24.2

Source: \* CITI Analysis & Ministry of Statistics Planning & Implementation

- For the month of June 2023, the Quick Estimates of Index of Industrial Production (IIP) with base at 2011-12 stands at **143.4**.
- Cumulative change for Apr-June 2023 for textiles was down by **3.3%** and wearing apparel was also down by **24.3%** over the same period of the previous year.





# 11<sup>th</sup> Asian Textile Conference

August 31 - September 1, 2023

Radisson Blu, Coimbatore, India

2025 AND BEYOND – ASIA, THE GLOBAL HUB FOR TEXTILE MANUFACTURING & CONSUMERS

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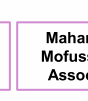
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# Textile sector Skill Council



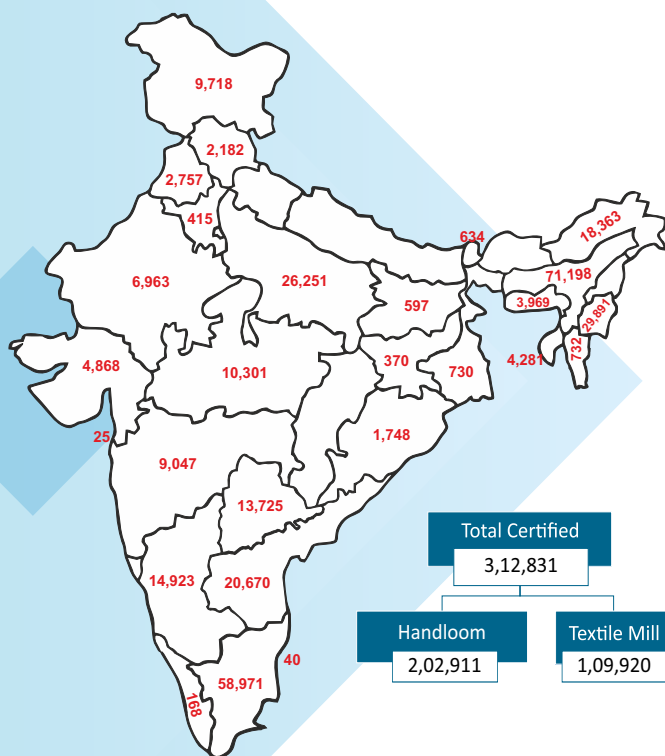
## Who we are :-

- Sector Skill Council for Textile & Handloom established in 2014.
- Guided by 11 industry associations and 3 export promotion councils.
- Recognized as an Awarding Body for textile and handloom sector by NCVET since, June 2022.
- Mandated to develop skilled workforce for textile value chain from spinning to fabric finishing.

## Birds eye view of Indian Textile Industry :-

- Contributes to 27% of the revenue from foreign exchange, mainly through textile exports.
- Contributes to 14% value-addition in the manufacturing sector of the country.
- Second largest in terms of providing employment opportunities to more than 35 million people.
- India's textile industry is expected to reach USD 209 billion by 2029.
- Fifth largest producer of Technical Textiles with 4-5% Global Share.
- Technical textiles market is projected to increase to reach USD 3.7 billion by 2027.
- Industrial textiles market is likely to increase to reach USD 3.3 billion in 2027.
- Industry has around 4.5 crore employed workers including 35.22 lakh handloom workers across the country.
- Union Budget 2023-24, the total allocation for the textile sector was Rs. 4,389.24 crore (US\$ 536.4 million).

## Training Achievements



## What we have done :-

- Developed 71 industry relevant Qualification Packs.
- DigiBunai CAD software based training for Handloom Weavers.
- Class 10th opportunity through National Institute of Open Schooling (NIOS).
- Helping industry with 20 futuristic qualifications.
- Encouraged 692+ training center to contribute in Skill India.
- Facilitated career progression for 400+ handloom weavers through mudra loan and connecting them to direct market.

## Contribution of Textile Industry in Skill Ecosystem :-

- Invest significantly in training unskilled youth, spending almost Rs. 332 Crore annually to train about 1.23K freshers.
- Facilitated development of industry relevant courses.
- Promoted Apprenticeship and On-the-Job Training
- Collaboration with educational institutions and vocational training centres.

## Industry benefits under Skill Ecosystem :-

- Reimbursement of Skilling Cost as per the common norms for the duration of the courses between 300 – 400 Hrs.

## Incentivisation under apprenticeship program :-

- Engage Apprentices in the band of 2.5% to 15% of total Manpower Strength.
- Employers are exempted from EPF and ESI contributions.
- Partial reimbursement of stipend to candidate

## Some of the Future Qualifications of TSC :-

- Tape Plant Operator
- Tape Winder
- Circular Loom Operator
- Assistant Design Maker - Textiles