

TEXTILE



CONFEDERATION OF INDIAN TEXTILE INDUSTRY
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11th

atexcon
Asian Textile Conference



11th

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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Dear Readers,

I am deeply honoured to address you as the newly elected Chairman of CITI. It is with immense pride and a profound sense of responsibility that I take on this role, as we navigate through the ever-evolving landscape of Indian textile manufacturing and exports. I would like to express my heartfelt gratitude for entrusting me with this responsibility, and I am committed to leading our Association with diligence and dedication.



The Indian textile industry has always been a cornerstone of our nation's economy and cultural heritage. Our rich history in textiles dates back centuries, and today, we continue to be one of the global leaders in this sector. However, we are currently witnessing a pivotal moment in the Indian textile industry, one that promises exciting opportunities and challenges in equal measure and I must acknowledge that CITI's role is pivotal in facilitating collaboration, knowledge sharing, and advocacy.

As we stand on the cusp of new challenges and opportunities, we must acknowledge the dynamic nature of our industry. It is imperative that we continue to invest in research and development, adopt latest environmentally benign technologies, and sustainable practices, and foster a culture of collaboration within the industry.

As I take on charge, my top priority would be to harness the potential of collaborative efforts to upscale the various initiatives that are there at the sectoral, regional or industry level and bring synergies for more effective impact.

Another important area is ensuring raw material security and availability at competitive prices, as that is the backbone of a competitive value chain. Towards this, import duties on raw material like cotton, significant price fluctuations and differentials from imports are major deterrents to price competitiveness.

The textile industry is characterized by both promise and uncertainty. Our industry continues to be a significant contributor to our nation's GDP, providing employment to millions of people, particularly in rural areas. It has also shown remarkable resilience in the face of adversity, such as the COVID-19 pandemic, where many textile manufacturers swiftly pivoted to produce essential protective gear.

Additionally, our exports play a crucial role in boosting the Indian economy. CITI has been working closely with the government and other stakeholders to address trade barriers, enhance competitiveness, and explore new markets. Diversification and innovation in product offerings can open up new avenues for our industry on the global stage. As we navigate the present landscape, it is crucial to acknowledge the importance of sustainability and ethical practices. Consumers worldwide are increasingly conscious of the environmental and social impact of their choices. Therefore, our industry must continue to prioritize sustainability in production processes, resource management and product innovation.

I am happy to share that CITI is co-hosting the 81st Plenary Meeting of the International Cotton Advisory Committee (ICAC), in Mumbai from December 2nd to 5th, 2023 along with CCI and CAI. The event is being hosted by the Ministry of Textiles. The theme for this event is "Cotton Value Chain: Local Innovations for Global Prosperity," with over 400 delegates and observers expected to attend from more than 27 countries. With India playing a bigger role in platforms like ICAC and with events like the forthcoming Bharat Tex in February 2024, the industry has a greater opportunity to be at the center stage in the growing discussions on Global Value Chain.

Together, we can write a new chapter of success, sustainability, and innovation for our industry. I encourage open communication and collaboration among all stakeholders to foster an environment of growth and prosperity for our industry. Let us embark on this journey together, with a shared vision and unwavering dedication. Our legacy is strong, and our potential is boundless.

Thank you for your trust and support. I look forward to working closely with each one of you and making a meaningful impact on the future of our industry.

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As we move towards the last month of 2023, we see several recovery symptoms in the Indian textile sector after a long spell of financial stress, demand stagnation, inventory pile ups, raw material crisis and geo political challenges. Despite global economic uncertainties, the Indian T&A industry is on the path of recovery, leveraging its position as the 5th largest economy. The same is also reflected in the export data for September and October during which the T&A exports increased by 1.77% and 10.44% respectively as compared to the same period of previous year. The production indices and inventory positions also show signs of recovery. But the vision of achieving a USD 350 bn textile market by 2030 needs a far greater demand and supply side push in terms of raw material security, market access enablers, focussed facilitation for the MSMEs, business continuity support for stressed textile units, etc.



The present year witnessed an increased focus on environmental sustainability with the fashion industry marking a turning point towards a more eco-conscious future and initiatives like regenerative fibers, circular initiatives, transparency and digital solutions reshaping the fashion industry. In order to align itself with the changing global trend, India has also taken certain initiatives like the Quality Control Orders (QCOs) and the formation of an ESG (Environmental, Social, and Governance) Task Force to demonstrate India's commitment towards responsible manufacturing and emerges as the leaders in the global textile value chain.

CITI's events this year were also aimed at bringing these discussions to center stage – both for businesses and policy makers. CITI's Annual Mega Global Textile Conclave (GTC) emerged as a vital platform fostering collaboration, innovation, profitability, and sustainability in the global textile and clothing industry, setting the stage for a more responsible and balanced future. The theme "Strategies for Balancing Sustainability & Profitability in Textile Value Chain" underscored the need for strategic approaches in the industry. During the GTC 2023, CITI also introduced first ever Textile Sustainability Awards for categories such as Expanding Circularity, Progress Towards Sustainability, and Recyclers, to recognize companies that have aligned themselves with Sustainable Development Goals (SDGs).

With the increased commitments of Environmental, Social, and Governance (ESG) by global business stakeholders and with larger corporations embracing greener technology, there is also an emerging need to guide the majority of MSMEs towards capacity building in this area. Moreover, the influence of sustainable initiatives will significantly impact India's utilization of upcoming Free Trade Agreements (FTAs) with the EU, UK, and Canada, where evolving ESG regulations are becoming crucial for market access. With this in mind, CITI also started the ESG series by conducting workshops to enhance understanding, build capacity, and shared best practices with MSMEs that aimed to mitigate the impending negative impact of climate change. CITI, as a member of the Government's ESG Task Force, commits to facilitating industry connection and awareness for effective ESG initiatives.

The 11th edition of ATEXCON in Coimbatore in September 2023, themed "2025 & Beyond Asia's Global Hub for Textile Manufacturing & Consumers", was a grand success with stimulating discussions on Asia's pivotal role in textile manufacturing and consumption, acknowledging its 65% market share in the \$800 billion global trade, and a roadmap to further increase this share with India playing a pivotal role in the same.

Apart from this, CITI has conducted webinars on various topics throughout the year on topical issues like New Labour Codes and their impact on the Textile Industry, MSME Competitive (LEAN) Scheme, FTP 2023, Utilizing FTA's, etc.

The year also saw strong strides in CITI's Cotton Development & Research Arm, CDRA's role in enhancing cotton productivity and agronomic practices. Besides undertaking several CSR projects, CITI CDRA is also working as one of the implementing agencies for the Special Project on Cotton of ICAR-CICR - 'Targeting Technologies to Agro-Ecological Zones – Large Scale Demonstrations of Best Practices to Enhance Cotton Productivity' under NFSM during 2023-24. The CDRA network helped in implementation of several new agronomic practices and technologies with approximately 5000 small and marginal farmers. CITI is also developing a web-portal and mobile app for better implementation and project activities of this project. It is one of its kind portal where the real-time data of the farmers, the geo-referenced fields, and other provisions will be captured to help in better understanding, monitoring, and management of the farm production. The portal aims to strengthen market linkages of the producer and user industry in cotton and enhance traceability. CITI CDRA plans to work on promotion of regenerative cotton and carbon sequestration in the coming year. We invite textile industry to partner with us in these initiatives.

On behalf of the new Office Bearers and Committee Members of CITI, I wish all our readers a Very Happy and Prosperous New year!

11th Asian Textile Conference

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

Thank You Sponsors and Supporters



Asian Textile Conference (ATEXCON), the most awaited annual mega event of Confederation of Indian Textile Industry (CITI) was held on **31st August – 1st September 2023** in Hotel Radisson Blu, Coimbatore, Tamil Nadu, India. The initiative by the Confederation of Indian Textile Industry (CITI) brought together the entire textile value chain to discuss the issues and roadmap of the Indian textile industry. The Theme of 11th ATEXCON was **"2025 & Beyond Asia's Global Hub for Textile Manufacturing & Consumers"**. Over 450 delegates from global textile & apparel value chain participated in the 11th ATEXCON.

Shri Piyush Goyal, Hon'ble Union Minister of Textiles, Commerce & Industry, Consumer Affairs, and Food & Public Distribution graced the 11th ATEXCON as the Chief Guest and Smt. Darshana Vikram Jardosh, Hon'ble Minister of State for Textiles and Railways, Shri R. Gandhi, Minister For Handlooms And Textiles,

Boodhan & Gramadhan, Government of Tamil Nadu and Shri S. Muthusamy, Hon'ble Minister for Housing and Urban Development, Government of Tamil Nadu were the guest of honour. Other key government official from centre and state government also participated in the deliberations. A special advertisement on 11th ATEXCON was published in leading regional and national newspapers highlighting the mega event.

Gherzi Textile Organisation was the **knowledge partner** and **Southern India Mills Association (SIMA)** was the **Host Association** of the 11th ATEXCON. **Government of Tamil Nadu** extended its support to the 11th ATEXCON as a **State Partner**.

11th ATEXCON acknowledged 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 investigated on important aspects of the T&A business today with his 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 had an underlying need for collaborative solutions.

A galaxy of eminent speakers and panellists deliberated on various important aspects of the textiles and apparel business covering the following topics.

Business sessions:

- 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
- Collaborating With India
- Green Revolution: Scaling Sustainable Textile & Apparel Manufacturing
- Trends, Developments And Innovations In Home Textiles

Inaugural Address by Shri Piyush Goyal, Hon'ble Textile Minister - India has the potential to become the world's largest textile hub



(In the Picture): Mr. Piyush Goyal, Hon'ble Union Textile Minister delivering the Inaugural address as the Chief Guest.

Hon'ble Union Minister of Textiles, Commerce & Industry, Consumer Affairs and Food & Public Distribution, Sh. Piyush Goyal was the Chief Guest at 11th ATEXCON and his stimulating keynote address inspired the Industry. He especially appreciated CITI

Chairman, Shri T Rajkumar and Sima Chairman, Mr. Ravi Sam for putting in a lot of effort in organizing the 11th edition of ATEXCON and bringing together the entire textile value chain on a single stage. He was happy to see leaders of various Export Councils, Trade

promotions, and regional associations coming together at one table to discuss the issues and roadmap of the Indian Textile Industry.

India is at the rare bright spot of the economy and despite facing the challenges of, the Russian-Ukraine War, global inflation, and challenges posed by Covid-19, India today is one of the fastest growing economies of the world and it is a matter of pride that despite having the different challenges India is able to keep a low inflation rate during the last decade and come out as the fastest growing economy and became 5th largest economy in terms of size of GDP and first time in 75 years we had relatively low inflation in the last nine years.

He thanked all captains of the industry and appreciated for achieving an increased exports of about 776 bn, during 2022-23 which has increased by about 55% in a span of just two years. He expressed confidence that the Indian economy to become a US\$ 35 trillion economy by 2047 when we celebrate 100 years of our independence

Mr. Goyal highlighted the importance of India for having the highest working-age population in the world. India has about 65% population in the working age group, whereas the same is about 33% for the rest of the world. This will give an added advantage to India in years to come.

Under the able leadership of Hon'ble Prime Minister, Shri Narendra Modi Ji, a strong foundation for the economy has been laid. Our government has brought political and economic stability in the last nine years. Today India has the world's fourth largest forex

reserves and we are very sure the growth rate of India will grow faster than this current rate in the years to come and we should be far more ambitious in achieving our goals.

The Minister said that FTA's will bring glory to India's textile sector and soon world market will be flooded with Indian goods. The minister raised hopes of concluding FTA with the UK which will provide a big boost to the Indian Textile Industry.

Appreciated the efforts of Indian Machine Manufacturers like LMW for developing indigenous technology and textile machines for the Indian Textile Industry and reducing dependency on imports. He opined that we must scale up the indigenous textile technologies and modern machines through R&D and innovation. It is a matter of pride for Tamil Nadu, Coimbatore, and India.

Minister appreciated the Textile Industry for doing commendable work till now and asked them to multifold their efforts and put in more hard work as a lot is yet to be achieved. The Textile Industry has the potential for the same and India has the potential to become the world's largest textile hub. I am sure the entire textile value chain will weave tradition and innovation, weave together culture and commerce, and will work together to contribute to the all-inclusive growth of the Indian Economy as the world is seeing the true potential of India. We are privileged to serve our motherland. Let us all collectively resolve to work in a spirit of togetherness and work with a spirit of duty as brothers and sisters and as one family to bring glory to India as a developed nation, so that the world acknowledges that 21st century is an Indian century.



Shri T Rajkumar welcoming Chief Guest and Guest of Honors at the 11th ATEXCON. In the picture (from left to right) Mr. Ashwin Chandran, Vice Chairman, CITI, Shri K.M. Subramanian, President, TEA, Shri Sakthivel, Vice President, PDEXCIL, Shri Premal Udani, MD, Kaytee Corporation, Padma Shri, Dr. A. Sakthivel, President, FIEO, Shri R. Gandhi, Hon'ble Minister for Handlooms & Textiles, GoTN, Shri Piyush Goyal, Hon'ble Union Minister for Textiles, GoI, Smt Darshana V. Jardosh, Hon'ble Minister of State for Textiles, GoI, Shri R Sakkarapani, Hon'ble Minister for Food and Civil Supplies, GoTN, Shri Ravi Sam, Chairman, SIMA, Smt. Vanathi Srinivasan, National President, BJP Mahila Morcha MLA, Coimbatore South, Shri K Annamalai, President, BJP (Tamil Nadu), Shri Vijay Kumar Agarwal, Vice Chairman, TEXPROCIL, Shri Rahul Mehta, Chief Mentor, CMAI and Shri Rakesh Mehra, Deputy Chairman, CITI

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 had a welcome address by Mr. T. Rajkumar, Chairman, CITI, followed by theme presentation by Gherzi Textil Organisation, Knowledge Partner of the 11th ATEXCON, Keynote address by Smt. Darshana Vikram Jardosh, the Hon'ble Minister of State for Textiles and Railways and Vote of Thanks by Mr. Rakesh Mehra, Deputy Chairman, CITI.

In his Welcome Address Mr. T. Rajkumar, Chairman, CITI stated that India plays a significant role in the Asian textile industry and also the global textile industry. India is one of the few countries of the world which have the presence of the entire textile value chain i.e., from the production of raw materials to the delivery of finished products, with substantial value-addition at each stage of processing, unlike its peer competitors which are dependent on other countries for their raw material supply, he said.

The Indian textile industry has improved as a result of investments made in a number of departments,



(In the Picture): Mr. T. Rajkumar, Chairman, CITI welcoming the delegates and delivering the address in the Theme Session.



(In the picture): Smt. Darshana Vikram Jardosh, the Hon'ble Minister of State for Textiles and Railways delivering Keynote Address as the Guest of Honor

particularly the Research and Development division, which has enhanced the general performance of the fabrics used in the textile sector, stated Ms. Darshana Vikram Jardosh, Hon'ble Minister of State for Textiles at the 11th ATEXCON.

Addressing the Asian Textile Conference (ATEXCON) organised by the Confederation of Indian Textile Industry, Mr. Jardosh noted that the Indian textile

industry is primarily concentrating on the supply chain, which is made up of the 5Fs: farm to fiber, fiber to factory, factory to fashion, and fashion to foreign.

The development of indigenous manufacturers has been greatly aided by the "Make in India" push, Ms. Jardosh said and added that to support the welfare of domestic manufacturers, the Indian government has implemented the PLI and PM Mitra schemes.



(In the Picture): Mr. Navdeep Singh Sodhi, Partner, Gherzi Textil Organisation, Switzerland while making the Theme Presentation as Knowledge Partner of 11th ATEXCON.

Highlights of Theme Presentation by Knowledge Partner – Gherzi Textil

The invention of the spinning jenny by James Hargreaves in the 18th century heralded the Industrial Revolution. Since then, the textile industry has been continuously reinventing itself. At different stages of the industry's historical evolution, structural and technological shifts have played a defining role. The theme of the two-day 11th ATEXCON, being organised by CITI in Coimbatore on 31 Aug – 1 Sep, is therefore quite apt.

Since the liberalisation of the world trade in textiles and clothing in 1995 post MFA, Asia has emerged as the powerhouse for textiles. This is clearly evident in terms of manufacturing capacity, fibre production, international trade and marketing.

- 60 percent of the world's cotton and 80 percent of man-made fibres are produced in Asia and Oceania
- 90 percent of short-staple spinning and more than 80 percent of fabric forming capacity (knitting and weaving) is installed in Asia (ITMF 2021)
- The continent has a market share of 60 percent in world exports of textiles & clothing. Intra-Asia

imports of textiles and clothing are more than 125 bn (WTO 2021) and growing as supply chains disperse

- Presently two Asian brands are ranked among the world's Top 5 brands and retailers – Fast Retailing and Shien

5 THEMATIC AREAS

The global textile industry is presently undergoing the second wave of restructuring and consolidation. Five thematic areas will shape the future evolution of textile industry:

- Sourcing shifts are accelerating due to economic fundamentals and geopolitics. In 2001 -the year of China's accession to WTO-its market share of world clothing trade was 19 percent. China's market share at its peak reached 40 percent (2015); in 2021 it had contracted to 33 percent.
- Climate change has brought environmental sustainability as the pivot of policy making. The

global north has introduced about 60 different legislative initiatives with potential implications for suppliers. Of these 12 initiatives will have far-reaching operational and legal impacts on apparel suppliers. These will include increased demands from brands about traceability and increased reporting requirements. The US Uyghur Forced Labor Prevention Act (ULFPA) is already effective. The European Green Deal singles out the EU Strategy for Circular Textile with 11 legislative measures (examples: eco-design for sustainable products, digital product passport, et al)

- Digitalization: Both demand side and supply side digitalization and automation will gain pace and have a big impact on the industry. This will require adaptation and inculcation of digital literacy among entrepreneurs and workers.
- Consumption patterns are changing: Circa 1960, the US personal spending was \$ 330 bn with ratio of goods to services as 55:45. Since 2000, the ratio has been consistently reversed to 35:65 (goods: services). Moreover, the share of apparel in total US consumer spending on goods has dropped from 12 percent to 8 percent (BEA). Notably, the US annual spending on clothing and footwear increased from \$317 bn in 2008 to \$491 bn. Mass customisation is also gaining momentum.
- Demographics- In 1990, Asia and Pacific had 60% share of the global workforce. In 2030 the share will decline to 55%. On the other hand, share of Africa will increase from 10% to 20%

5 POLICY IMPERATIVES

From the above narrative therefore, we take away five policy imperatives for the industry and governments to ponder technology upgradation to achieve sustainability goals (especially energy, water and recycling). There is also a big disparity in state-of-technology from one country to another. For instance, at the world level, 37 percent ring spindles are less than 10 years old (considered)

- Technology upgradation – There is a huge potential for relatively modern). Turkey and China have more than 40% modern spindles whereas India has less than 30 percent share of modern spinning capacity (ITMF 2021)
- Cluster development- The Asian industry thrives in natural clusters that have evolved over the last more 30 to 50 years (Ludhiana, Panipat, Tiruppur, Ichalkaranji, Narayanganj, Surat, Faisalabad, Ho Chi Minh City, and several more). Millions of anonymous SME's populate them. They are the

backbone of our industry and their eco-system will have to be consolidated and upgraded. This requires massive public investments, especially in water infrastructure and renewable energy.

- Scale: To integrate with the global value chain, the industry in emerging countries needs scale. China understood this early on. Consider this, there are 25 companies in China and Viet Nam that have a knitting and processing capacity of 50 tons per day and above (of which are 10 are with more than 100 tpd of capacity); in the sub-continent there are less only five such companies with scale.
- Policy distortions- A low hanging fruit would be to unlock the potential of our industry by first addressing the distortions that stifle downstream investment and cross-border regional trade. The industry needs unfettered access to raw materials and at competitive prices.
- Brands- Asia will have to create more ODMs (Original Design Manufacturing) and OEMs (Original equipment manufacturing).



Ms. Prajakta L. Verma, IAS, JS, Ministry of Textiles addressing the 11th ATEXCON delegates

The new approach will require a transition to new business models with a holistic approach. Gherzi has been a thought leader for the industry since 1929 providing advisory on transition to sustainable growth.

Ms. Prajakta L. Verma, IAS, Joint Secretary, Ministry of Textile while addressing the conference delegates opined that convergence and cooperation enable significant progress. Convergence aids in correcting errors and responding to criticism. To address the

issues and challenges, the textile sector needs both internal and external collaboration, she stressed.

Ms. Verma said that the overall emissions produced by the aviation and maritime sectors are virtually comparable to those of the textile sector alone.

The textile sector needs workers with green skills in order to adopt sustainability and circularity, minimize emissions, and solve this issue. Our greatest strength and the source of 90% of our production is the MSME, she pointed out.



Mr. Rakesh Mehra, Deputy Chairman, CITI delivering the Vote of Thanks in the Theme Session



(In the Picture: From Left to Right) Mr. Ashwin Chandran, Vice Chairman, CITI, Mr. Rahul Mehta, Chief Mentor, CMAI, T. Rajkumar, Chairman, CITI, Ms. Prajakta Verma, IAS, Joint Secretary, Ministry of Textiles, Smt. Darshana Vikram Jardosh, Hon'ble Minister of State of Textiles & Railways, Government of India, Mr. Rakesh Mehra, Deputy Chairman, CITI, Mr. Navdeep Sodhi, Partner, Gherzi Textil and Dr. Christian Schindler, DG, ITMF.

SESSION: ENABLING RESILIENT TEXTILE & APPAREL SUPPLY CHAINS



(From Left to Right in the picture): Mr. Subhash Chahar, DGM & RM(SRO), Export Credit Guarantee Corporation Ltd (ECGC), Ms. Annika Passii, Executive Director – Business Operations, PDS Ltd., Mr. Rahul Mehta, Past President & Chief Mentor, Clothing Manufacturers Association of India (CMAI) & MD, Creative Garments, Mr. Vijay Agarwal, Vice Chairman, The Cotton Textiles Export Promotion Council (TEXPROCIL), Mr. Srinivasan Kari, President and Chief of Manufacturing and Operations, Page Industries, Jockey India and Mr T. Sivaraman, Managing Director, Royal Classic Mills Pvt Ltd

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 panellists delved into some key approaches to promote resilience within these supply chains.

Discussions in the Session was focussed on the need of having a Resilient Textile & Apparel Supply Chain. Panellists opined that in today's time it is very important to develop "Right Product at Right Time and Right Place" by taking care of the aspects of margin also.

Panellists discussed about the need of having the concepts of Just in Time (JIT), lean manufacturing etc, to keep the right inventory at right place. However, such

concepts should be adopted along with a with a shock absorbing mechanism to take care of the situations like Covid and Russian-Ukraine War.

There were also talks related to the need to having more Green factories in India to meet the emerging requirements of ESG of various brands and companies should focus more on developing domestic supply chain instead of depending on imports.

SESSION: REGIONAL COOPERATION AND PARTNERSHIPS FOR SUSTAINABLE DEVELOPMENT



(From Left to Right in the picture): Mr. Debasish Kumar Saha, CEO, Esquire Group, Bangladesh, Dr. Christian Schindler, Director General, International Textile Manufacturers Federation (ITMF) (Session Moderator), Mr. Boobalan Pitchamuthu, President Director, Texcoms Worldwide and Ms. Roop Rashi, Textile Commissioner, Government of India (Session Chair)

Session deliberated upon how the Asian countries should boost regional cooperation to take the maximum benefit of the China + 1 policy.

Panellists opined that Asian countries like India, Bangladesh, Indonesia should work towards having a more resilient and integrated supply chain starting from the fibre to finished goods like apparel and made-ups and should also utilize the latest IT solutions to make them more robust. Panellists suggested that in order to capture the share of China from the global trades, other Asian countries should work towards achieving the scale and should also adopt flexibility in their manufacturing to meet the emerging demands of customers.

It was also discussed that Asian countries should work towards having common standards, certificates and cooperation in Customs for increased mutual cooperation in the region.

Panellists opined that Asian countries should ask their respective Governments to come up with new HSN codes for garments and other textile items made-up of recycled fibres. Ideas to incorporate the costs of obtaining sustainability and other certifications in the supply chains were also discussed with manufacturers and various brands and sourcing companies.

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



(From Left to Right in the picture): Mr. Bhadresh Dodhia, Chairman, The Synthetic & Rayon Textiles Export Promotion Council (SRTEPC), Mr. K.M. Subramanian, President - TEA, K.M. Knitwear Pvt. Ltd., Mr. Rohit Kansal, IAS, Additional Secretary, Ministry of Textiles (Session Chair), Mr. Prashant Agarwal, Jt. Managing Director, Wazir Advisors (Session Moderator), Dr S K Sundararaman, Managing Director, Shiva Textyarn Ltd. and Mr. T. Murugan, Global Business Development Head, Grasim Industries Ltd, Pulp & Fibre I Aditya Birla Group

The session started with the opening remarks of Shri Rohit Kansal, Additional Secretary, Ministry of Textiles. He said that the demand for MMF is increasing globally. Trends such as Resilience of Supply Chain, sustainability, digitalization, and investment in R&D are re-shaping the global MMF industry.

Panellists opined that India has a big domestic market. Moreover, the synthetic industry in India is growing at a faster pace as compared to the cotton industry and we need to work towards increasing our MMF manufacturing base to meet this increased demand and also to align ourselves with the changing global trend.

Deliberations were also made about increasing R&D in the MMF and Technical Textile Sector by establishing more cluster-focused research institutes. Requests were made to the Government towards greater access of low-cost capital for MMF and the Technical Textile Industry as also working towards increasing FDI from countries

like Taiwan, Korea, Japan, etc. which are already strong in the MMF sector.

SESSION: BRAND TALK



(In the Picture-Left to Right): Dr. Kiruba Devi, Head category and sourcing, Zivame, Mr. Raman Dutta, General Secretary, Brands & Sourcing Leaders Association, Mr. Tapan Bansal, Director, Mothercare Sourcing India Pvt Ltd and Mr. Mohit Mathur, Chief Sourcing Officer, Ace Turtle

Branding is a crucial aspect of business and marketing, involving the creation and management of a distinctive image, message, and perception for a company, product, or service. Effective branding can help a business stand out in a crowded market, build customer loyalty, and convey its values and personality. Sustainability, digitalization and Make in India are the key areas that the brands need to focus on.

The deliberations of the panel focussed on:

- How are the Indian fashion brands faring against their international rivals to capture the mind share of the Indian market
- There are only two Asian brands (Shein, Uniqlo) among the top 10 international fashion brands and retailers. With Asia as the consumption hub, what opportunities are foreseen to launch regional brands
- Several home textile majors that have achieved success in the export market are trying to
- How to position India as an alternative sourcing destination
- Impact of the move towards circularity on brand marketing and safeguards against green washing

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



(Left to Right): Mr. A. Jeyamohan, MD, ICI Projects, Dr.M. Vallalar I.A.S, Textile Commissioner, Government of Tamil Nadu, Mr. Navdeep Sodhi, Partner, Gherzi Textil Organisation (Session Moderator), Dr. K. Selvaraju, Secretary General, SIMA and Mr. Ramanathan V., Executive Director, Silk Park, Kanchipuram

The panel discussion was focus on topics of contemporary interest:

- Argue about the experience of other major textile & garment producing countries towards development of SEZs
- What would be the key success factors for the realization of the policy objectives
- Argue about the state government policies and action plan to attract investment

SESSION: GREEN REVOLUTION: SCALING SUSTAINABLE TEXTILE & APPAREL MANUFACTURING

The session deliberated upon increasing the usage of the renewable energy in the textile industry which will not only reduce the consumption of natural resources but will also help in saving certain costs.

Panellists opined that though many technologies are already present in the market which can reduce water and electricity consumption by about 30-40% thereby reducing the operational costs, however, there is lack of awareness for the same.

Panellists also discussed about reducing the cost implications towards adopting renewable technologies in textile industry



(In the Picture-Left to Right): Ms Anjali Krishnan, Program Manager, Alternate Materials, IDH, Mr. Jayanth Kashyap B, Investment Lead, Good Fashion Fund, Mr. Varun Gulati, CEO, India Net Zero Alliance & FirstView Group Media Ventures (Session Moderator), Mr. Dharmendra Pratap Yadav, IAS, Principal Secretary, Handloom, Handicrafts, Textiles and Khadi Department Secretariat, Govt. of Tamil Nadu (Session Chair), Mr. M. Sankar, President, Lakshmi Machine Works (LMW), Mr. Harish Anantharaman, Managing Director, Accelerated Cleaning Systems India and Mr. Balakrishna Thoopili, AGM, Waaree Energies Ltd.

Session discussion were focussed on:

- Pathways to Achieve Net Zero Emissions & Water Net Zero
- Innovative Green Technologies in Textile Manufacturing
- Circular Economy & Textile Recycling
- Certification & Standards for Sustainable Textiles
- Negotiating the EU-Green Deal – Impact on Textile Industry
- Discuss compliance requirements and potential business opportunities and perceived challenges arising from the Green Deal

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



(In the Picture-Left to Right): Mr. G. Kannappan, CMD, Sharadha Terry Products and Mr. Siddharth Rajagopal, Executive Director, The Cotton Textiles Export Promotion Council (TEXPROCIL) (Session Moderator)

as a result of the expanding real estate industry and rising standards of living. This was also anticipated to be one of the major drivers of market expansion throughout the foreseeable future. The panellists of the Session provided 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

Deliberations in the Session were made to take Indian exports of Home Textiles to a level of about USD 15 bn by 2030. Panellists opined that India should use its inherent potential and also cash upon the FTA to grab more market share in the world.

Deliberations were also made towards the usage of MMF and blends in the manufacturing of Home Textiles products.

The 11th ATEXCON was a huge success and ended on a very positive note. The Vote of Thanks at the end was delivered by Mr. Ashwin Chandran, Vice Chairman, CITI.

11th ATEXCON was supported by leading Textile Trade Associations like International Textile Manufacturers Federation (ITMF), Joint Apparel Association Forum, Sri Lanka, Apparel Export Promotion Council (AEPC), The Cotton Textiles Export Promotion Council (TEXPROCIL), The Synthetic & Rayon Textiles Export Promotion Council (SRTEPC), The Clothing Manufactures Association of India (CMAI), Handloom Export Promotion Council (HEPC), Tirupur Exporters Association (TEA), etc.

The Sakthi Group of Companies, Lakshmi Machine Works (LMW), Birla Cellulose, Waaree Energies, India ITME Society, ECGC are some of the prominent sponsors of the 11th ATEXCON.



Vote of Thanks delivered by
Mr. Ashwin Chandran, Deputy Chairman, CITI



**Jemmy Kartiwa
Sastraatmadja**

CHAIRMAN OF TEXTILE
ASSOCIATION OF INDONESIA
(API)

WORDS FROM

"India & Indonesia are bound by a shared cultural legacy, both our nations foster a long lasting relationship built on mutual trust & camaraderie.

In pursuit of mutual growth and strengthening our relationship in Textile trade, I take this opportunity on behalf of the Indonesian Textile fraternity to invite CITI to join with us in a collaborative approach to organise together a next event in Indonesia.

It would be a stepping stone to synergize our efforts, discuss collaborations, and explore growth opportunities together"



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CITI PRESS RELEASES

"INDIA HAS THE POTENTIAL TO BECOME THE WORLD'S LARGEST TEXTILE HUB"

New Delhi, Friday, 01 September 2023: The Confederation of Indian Textile Industry has organized the 11th edition of ATEXCON in Coimbatore from 31st August to 1st September. This year's theme of ATEXCON is "2025 & Beyond Asia's Global Hub for Textile Manufacturing & Consumers". Over 400 delegates from the global textile & apparel value chain are participating in the 11th ATEXCON.

ATEXCON brings together the leading players of the Asian textile industry, global input suppliers, and service providers to deliberate on key areas of business, including regional as well as global issues concerning this sector..

Hon'ble Union Minister of Textiles, Commerce & Industry, Consumer Affairs and Food & Public Distribution, Sh. Piyush Goyal was the Chief Guest at ATEXCON and his stimulating keynote address inspired the Industry. He especially appreciated CITI Chairman, Sh. T Rajkumar and SIMA Chairman, Mr. Ravi Sam for putting in a lot of effort in organizing the 11th edition of ATEXCON and bringing together the entire textile value chain on a single stage. He was happy to see leaders of various Export Councils, Trade promotions, and regional associations coming together at one table to discuss the issues and roadmap of the Indian Textile Industry.

India is at the rare bright spot of the economy and despite facing the challenges of, the Russian-Ukraine War, global inflation, and challenges posed by Covid-19, India today is one of the fastest growing economies of the world and it is a matter of pride that despite having the different challenges India is able to keep a low inflation rate during the last decade and come out as the fastest growing economy and became 5th largest economy in terms of size of GDP and first time in 75 years we had relatively low inflation in the last nine years.

He thanked all captains of the industry and appreciated for achieving an increased exports of about 776 bn, during 2022-23 which has increased by about 55% in a span of just two years.



CITI'S 65th AGM

New Delhi, Friday, 29 September 2023: The Confederation of Indian Textile Industry (CITI) held its 65th Annual General Meeting (AGM) on 29th September 2023, through video conferencing.

Following the 65th AGM, the newly Reconstituted Committee of CITI elected, Shri Rakesh Mehra as Chairman, CITI, Shri Ashwin Chandran as Dy Chairman, CITI and Sh. Dinesh Nolkha as Vice Chairman for the year 2023-24.

The brief profiles of the Office-bearers of CITI are given below for your kind reference.

Shri Rakesh Mehra, Chairman, CITI

Mr Rakesh Mehra, a Chartered Accountant, is the Chairman of Banswara Syntex Limited (BSL), integrated textile manufacturer & exporter of yarns, fabrics and garments, having a turnover of Rs 1,400 crores. He did his schooling in Amritsar & Ajmer and BCom in Chandigarh. He completed his 3 year Articleship with AF Ferguson & Co, Chartered Accountants, Mumbai

Mr Mehra joined BSL in 1986 and was one of the pioneers in developing the export of Man Made Textiles out of India. He has to his credit the opening up of the fabric export business to the UK and the Yarn Export Business to Turkey.

Mr Mehra has been associated with various Industry Associations. He was elected Chairman of The Synthetic & Rayon Textile Export Promotion Council (SRTEPC) for two terms. He was President of Indian Spinners' Association (ISA), and Deputy Chairman of Confederation of Indian Textile Industry (CITI).

Shri Ashwin Chandran, Deputy Chairman CITI

Shri Ashwin Chandran, Chairman and Managing Director of M/s. Precot Limited, Coimbatore **has been elected as the Deputy Chairman of CITI**. Shri Ashwin Chandran, a B.Sc., (Hons) Graduate in Textile Technology, UMIST, UK and Post-Graduate (MBA) from University of Illinois, USA, Shri Ashwin Chandran has held the position of Director in PC Racing Foundation, The Cotton Textiles Export Promotion Council, Textile Sector Skill Council. He has also been the Chairman of SIMA, Member of CITI Sub-Committee on Manmade Fiber and Yarn and Technical Textiles, Chairman of Yarn Committee of TEXPROCIL, Vice-Chairman of Confederation of Indian Textile Industry (CITI), New Delhi

Shri Dinesh Nolkha, Vice Chairman, CITI

Mr. Dinesh Nolkha, **Managing Director & CEO of Nitin Spinners Ltd.**, Bhilwara, is a fellow member of The **Institute of Chartered Accountants of India** and **The Institute of Cost & Management Accountants of India**. He had a brilliant academic career having secured 4th rank on All India Basis in ICMA Final Exams in 1991 and 43rd Rank in ICAI Final exams in 1992. Mr. Dinesh Nolkha is a member of various industrial associations. He has served as President of Mewar Chamber of Commerce and Industry, Bhilwara, Rajasthan and Chairman of NITRA, Ghaziabad. Presently he is Vice President of Rajasthan Chamber of Commerce & Industry, Jaipur, Rajasthan. He has also been conferred by CA Business Leader Award by The Institute of Chartered Accountants of India.

CITI'S OUTGOING CHAIRMAN SHARES THE OUTLOOK OF THE TEXTILES AND APPAREL SECTOR

New Delhi, Friday, 29 September 2023: The outgoing Chairman of CITI, Sh. T Rajkumar delivered his address today at the 65th Annual General Meeting (AGM) of the Confederation of Indian Textile Industry (CITI) to the members sharing the outlook on what he believes in the road ahead for the Indian textiles and apparel (T&A) industry.

He said that it has been a challenging mandate in every respect possible. Unprecedented is almost an understatement due to the pandemic, However I am so pleased to inform that the CITI team demonstrated tremendous leadership over the past four years and immediately embraced the opportunity to lead in responding to the pandemic crisis.

Prior to the new board taking over, Sh. Rajkumar complimented on proactive policy support from the Government of India as a result, India achieved its highest ever T&A exports (HSN 50 to 63) of US\$ 43.4 Bn during 2021-22 which was about 41% higher than exports of US\$ 30.9 bn during 2020-21. He opined that T&A industry across the globe has been facing unprecedented financial stress mainly due to stagnation in production and trade stemming from a multitude of reasons such as high volatility in raw material prices, uncertainties emerging due to geopolitical conflicts like the ongoing Russia-Ukraine war, reorientation of supply chains and high inflationary pressures in countries like USA, EU, etc. giving a setback on exports of T&A from India which declined by about 18% to reach US\$ 35.7 bn during FY 23 as compared to FY 22.

He opined "The outlook is not entirely grim, the same can be seen in the latest trade figures released by the Ministry of Commerce which shows that after declining continuously for many months, India's cumulative Exports of Textiles and Apparel during August'23 have registered a growth of 4.33% over August' 22 primarily led by a 14% increase in the Textile exports.

Mr. Rajkumar expressed the industry will surely bounce back strongly towards the goal to clock a US\$ 350 bn market size including US\$ 100 bn exports by 2030. The aggressive pace and scope of the recent FTAs which are either signed up such as India-UAE CEPA, India-Australia ECTA or are under negotiations with countries like EU, UK, and Canada are indicators of this.

He opined that the introduction of the Quality Control Orders (QCOs) for several textile products, including all the major textile fibres have posed challenges ; such as product coverage, testing facilities, licensing procedures and timelines, domestic availability, dependence on imports, etc. which has affected the production planning of the entire textile value chain, He opined that good news is that a consultative approach is being taken by the Government in this matter to address the issues flagged by the industry.

Major Policy Issues and Recommendations

Sh. Rajkumar opined that CITI has been aggressively pursuing the various underlying issues of the Textile and apparel industry in a time-bound manner. While under the leadership of Hon'ble Union Minister of Textiles, Shri Piyush Goyal many of the issues of the industry have been resolved, there are yet several issues which need urgent intervention of the Government. Some of the issues that have been raised by CITI are:

- Removal of Import duty from cotton imports
- Revision of the Standard Input-Output Norms (SION) applicable for Viscose Staple Fibre Spun Yarn & its Blended Spun Yarn and MMF Blended Spun Yarns with Cotton
- Provide RoDTEP benefit on export of Cotton Yarn under Advance Authorization Scheme
- Exempting Bamboo and other Cellulosic Fibre not produced indigenously from the purview of VSF – QCO 2022
- Amending para 4.10 (i) of HBOP 2023 according to the provisions of GST Law

- Making submission of production data mandatory by the mills
- Rationalization of Goods & Service Tax (GST) on Man-Made Fibre and its Raw Materials to avoid Inverted Duty Structure

He expressed hope that the Government will soon resolve the other pending issues as well.

Major Developments in Cotton Textile Advisory Group (TAG)

He said the Government formed Cotton TAG with the participation of various stakeholders of the cotton value chain. CITI being one of the key stakeholders of TAG played the role of a think tank in resolving many of the issues of the cotton value chain, such as

- **Restructuring of the MCX Cotton Contract Specifications to make it more representative:** In this, a newly restructured MCX Cotton Future Contract was relaunched at MCX on 31st January 2023 and the trading on the same commenced from 13th February 2023 with the collaborative approach of the Government of India.
- **Augmenting Supply of Domestic Cotton:** He complimented that CITI's proposal Ministry of Agriculture & Farmers Welfare has initiated 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) model.

Branding of Kasturi Cotton:

CITI is actively participating towards the Traceability, Certification, and Branding of “Kasturi Cotton India” which is being implemented by TEXPROCIL in association with CCI.

Sh. Rajkumar opined that the industry's aspirations in terms of an alternative flagship TUFS scheme should come through quickly and will have the required scope and mandate to address the need for scaling up and innovation. Also, the Industry is continuously requesting the Government for PLI 2.0 with lower investment thresholds and wider product coverage and the industry is hopeful for an announcement soon in this regard.

He further informed; the Government will surely listen to our request favourably towards support for the MSME-driven Indian Spinning sector on the following financial support:

- Extend a one-year moratorium for repayment of the principal amount;
- Convert three-year loans under ECLGS into six-year term loans;
- Extend necessary financial assistance to mitigate the stress on working capital, on a case-to-case basis.

Sh. Rajkumar appreciated the Government for considering requests such as a special one-time Amnesty Scheme for default in Export Obligations, focus on Infrastructure and logistics development, Paperless filing of export obligation discharge applications, more focus on Online approvals without physical interface and several others.

Sh. Rajkumar expressed gratitude to the Hon'ble Prime Minister of India, Shri Narendra Modi Ji for listening to the Textile Industry's pleas and taking many pathbreaking policy decisions for the betterment of Indian Textile & Apparel Industry.

Sh. Rajkumar also expressed gratitude to the Hon'ble Union Minister of Textiles, Commerce & Industry, Consumer Affairs, Food and Public Distribution, Shri Piyush Goyal Ji, Hon'ble Union Minister of Finance, Smt. Nirmala Sitharaman, Smt. Darshana Vikram Jardosh Ji, Hon'ble Minister of State for Textiles, for extending all possible support and kind encouragement for the growth of the Textile Industry.

Sh. Rajkumar expressed sincere gratitude to Smt. Rachna Shah, Secretary Textiles, who has been steering the Textile Industry in the right direction and addressing various underlying issues of the Textile & Apparel Industry.

CITI ACTIVITIES

CITI'S WEBINAR ON UTILISING FREE TRADE AGREEMENTS TO GROW EXPORT OPPORTUNITIES

On September 14, 2023, the Confederation of Indian Textile Industry (CITI) hosted a seminal webinar titled 'Utilising Free Trade Agreements to Grow Export Opportunities'. This virtual event featured distinguished speakers including T. Rajkumar, the Chairman of CITI, Ms. Anjali Hirawat, and Shri Ankur Sharma, both partners at the renowned law firm specialists in Customs and International Trade, Lakshmikumaran & Sridharan (LKS).



The webinar covered the framework of the FTA's especially with regard to rules of origin and tariff/non-tariff notifications that the units should look into before they take a decision on importing from or exporting to an FTA country. More awareness of not just the country but also the tariff and non-tariff conditions and product-specific rules are important for successfully utilizing the FTA's.

Sh. T Rajkumar, Chairman, CITI appreciated the commitment of our Government to not only expand the Indian markets but also attract more FDI which comes with FTAs and leads to technology transfer, job creation, and economic development of the country. The Chairman opined that it is a matter of pride that India has signed 13 FTAs in the last five years including the India-Mauritius Comprehensive Economic Corporation and Partnership Agreement (CECPA), India-UAE Comprehensive Partnership Agreement, and India-Australia Economic Cooperation and Trade Agreement. He opined that there is a concern that we have not been able to leverage FTA's and hence we would like to sensitize the industry on this issue and have more stakeholder discussions on how to leverage the FTAs, especially for the Textile and apparel sector as India has immense potential to capture a major market share in these countries. He highlighted the status of the Japan, Korea and UAE FTAs where India signed CEPA with Korea in 2010. Since last 10 years Korea's T&A imports from the world have increased at a CAGR of 4% to reach US\$ 18.8 bn in 2022 while from India, it has increased at a CAGR of just 0.2% to reach US\$ 0.37 bn. Moreover, India's share in Korea has been hovering in a range of 2-3% during the last 10 years starting from 2013.

Similarly, India signed CEPA with Japan in 2011. During 2022, Japan imported T&A products worth about US\$ 35.4 bn from the world, India's share in which was a minuscule 1%. Moreover, India has not been able to increase its market share in Japan which since 2013 is still about 1% only.

India-UAE Comprehensive Partnership Agreement which came into force on May 2022. During the financial year 2022-23 (Apr- 22 to March 23) which consists of 10 months of FTA period, India's total merchandise exports to UAE increased by 12.7% as compared to the financial year 2021-22 while for Textile & Apparel India's exports to UAE declined by about 21.6% during the same period.

To conclude, we as an industry should align ourselves with the partner country, be it Supply Chain Management, be it institutional partnership or any type of cultural ethics. The industry must be at the forefront of adhering to the compliance and sustainability requirements of the FTA countries besides maintaining global quality standards, astute business models, and competitive pricing. The more we engage ourselves with the partner country, the more we will be able to reap the benefit of a greater partnership with the country.



CITI'S SECOND WEBINAR OF THE SERIES TITLED 'UTILISING FREE TRADE AGREEMENTS TO GROW EXPORT OPPORTUNITIES'

On 31st October, 2023, the Confederation of Indian Textile Industry (CITI) hosted the second webinar of the series titled 'Utilising Free Trade Agreements to Grow Export Opportunities'. This virtual event featured distinguished speakers including Ms. Chandrima Chatterjee, the Secretary General of CITI, Ms. Anjalai Hirawat, and Shri Ankur Sharma, both partners at the renowned law firm specialists in Customs and International Trade, Lakshmikumaran & Sridharan (LKS).

The primary objective of this webinar was to equip attendees with a familiarity with concession schedules along with the Rules Of Origin (ROO) and its associated concepts.

During the webinar, Anjali Hirawat emphasized the critical starting point of determining a product's eligibility under the Free Trade Agreement (FTA) Schedule of Concessions. She illustrated this point using Australia's Tariff schedule from the India Australia FTA. Anjali underscored the importance of correctly identifying the HSN classification of the product in question. Additionally, she discussed Staging Categories and the necessity of analyzing whether a product complies with the Rules of Origin (ROOs). Shri Ankur Sharma provided live examples of FTA schedules available in the public domain. Anjali and Ankur further elaborated on the multifaceted aspects of ROOs, including tariff jump, value addition (build up and build down formulas), indirect and direct methods of value addition, product-specific rules, and differences between sizing and minimal operations -- all using real-world examples. The concept of Bilateral Cubulation and the De Minimis Principle were also explained, allowing some flexibility in achieving the ROOs criteria. Concepts such as Insufficient Operations, Treatment of Packing Materials, Direct Consignment, and Third-Party Invoicing were covered.

In conclusion, the webinar provided a comprehensive understanding of the technicalities and operations of concession schedules and the rules of origin, enabling participants to navigate the world of FTAs more effectively.



CITI'S WEBINAR ON PRICING EXCELLENCE IN INDIAN TEXTILES & APPAREL SECTOR

On October 06, 2023, the Confederation of Indian Textile Industry (CITI) hosted a seminal webinar titled 'Pricing Excellence in Indian Textiles & Apparel Sector'. This virtual event featured distinguished speakers including Ms. Chandrima Chatterjee, the Secretary General of CITI, Mr. Pratul Kumar, Director, and MR. Hrishikesh Deshpande, Director - Client Services at Progility Consulting.

Ms. Chatterjee opened the session emphasizing the importance of pricing in the industry. Mr. Pratul Kumar, Director of Progility Consulting, discussed how pricing impacts profitability, emphasizing that textiles boast high operational efficiency.

Mr. Kumar highlighted that pricing should be based on perceived customer value rather than being reliant on agents and distribution partners. He stressed the need for differentiated customer preferences and focusing on profitability. The speaker's fundamental belief is that there exists no such thing as commodity. He further emphasized the importance of communicating customer value and escaping the commodity mindset. "...One will struggle to evaluate the commodity as the parameters will be endless and price won't be the first one...", he commented. He further said that how pricing decisions should not be arbitrary; they must be data-driven, considering external factors to reduce value loss. Increasing prices is possible when customers perceive value. Mr. Kumar cited the example of the steel industry, which successfully communicated and delivered value.

Hrishikesh Deshpande, Director- Client Services at Progility Consulting, emphasized the importance of data-based analytics in pricing and how developing a scientific tool is more beneficial over traditional calculations. "The pricing journey involves tackling a lot of internal myth and lots of introspection.", he added. He introduced a 3D approach aimed at achieving visibility, building governance structures, and making informed pricing decisions. The goal is to protect margins, justify discounts, identify profitable customer segments, and utilisation of data driven approach in product mix optimization. The key factor is to gain visibility and control over costs, prices, gross margin, contribution margin, quotes, discounts, and pricing guidelines and see whether it answers the effectiveness of margin protection, identification of products meeting recommended margins, and the justification of discounts.

Key Concept: 4
Pricing can't be guesswork

Variables that may lead to Price Decisions

Industry Segment	Customer Segment	Item/SKU's	Quality Specifications	Service requirements	Payment terms
Product Strategy	Market Share	Competitor Price	Market Trend	Machine & Route	Input Cost
Customer Strategy	Quantity/Lengths	Discounts	Rejections	Inventory Holding	Past Margins

PROGILITY

Ms. Chandrima Chatterjee, Secretary General CITI, Mr. Ratul Kumar, Director, Prodigy Consulting and Mr. Hrishikesh Deshpande, Director- Client Services at Progility Consulting

(In the Picture) Ms. Chandrima Chatterjee, Secretary General CITI, Mr. Ratul Kumar, Director, Prodigy Consulting and Mr. Hrishikesh Deshpande, Director- Client Services at Progility Consulting

CITI'S WEBINAR ON AN INTRODUCTION TO THE FS TREND PLATFORM

On October 26th, 2023 CITI hosted a webinar on Fashion Trend Forecasting in collaboration with Fashion Snoop's Platform, shedding light on the fusion of art and science in the fashion industry.

During the event, Shri Piyush Girotra, Senior Consultant, Fashion Snoops, emphasized that successful trend forecasting empowers fashion professionals with a competitive edge, enabling them to create products that resonate with their target audience and stay ahead in a fiercely competitive market.

The event showcased Fashion Snoop's platform for attendees to explore the multifaceted benefits of trend forecasting through the synergy of data-driven analysis, creative intuition, and cutting-edge technology, offering insights into the pivotal role it plays in designing and marketing products that resonate with consumers in the highly competitive and dynamic world of fashion.

Shri Piyush Girotra told that macro and micro trends are identified based on cultural sentiments, design aesthetics, and seasonal narratives. These trends form the basis for compelling trend stories, helping fashion enthusiasts make informed predictions about the industry's future direction. During the webinar attendees were also introduced to the "TRACK" section, a unique AI-backed tool that provides comprehensive coverage of future month fashion trends, going from the broader picture to specific products.



CITI CDRA CELEBRATES WORLD COTTON DAY 2022



New Delhi, Saturday, 07 October 2023: In celebration of World Cotton Day, the Confederation of Indian Textile Industry (CITI) - Cotton Development Research Association (CDRA) proudly recognizes the invaluable contribution of cotton to India's textile sector and the global economy. World Cotton Day, observed on October 7th, highlights the crucial role that cotton plays in our everyday lives, from textiles and apparel to medical supplies and even food products. It is a day to acknowledge the importance of cotton as a sustainable and versatile crop.

Cotton, often referred to as "white gold," holds a paramount position in India's textile industry. It is the backbone of countless livelihoods and a key driver of economic growth, making India one of the world's leading cotton producers. On this special occasion, CITI-CDRA reaffirms its commitment to advancing cotton research, development, and sustainability practices.

Mr. Rakesh Mehra, Chairman of CITI, commented "World Cotton Day is a momentous occasion to acknowledge the tireless efforts of our cotton farmers and the collaborative work of researchers, policymakers, and industry stakeholders. CITI-CDRA remains committed to fostering sustainable practices, enhancing cotton quality, and ensuring the prosperity of cotton farmers."

CITI- CDRA (Cotton Development and Research Association) is making waves in the Cotton production sector, connected with more than 92,576 farmers across 109,971 hectares of cotton land in the states of Maharashtra, Rajasthan, and Madhya Pradesh. Through various initiatives and partnerships, CITI CDRA is driving Cotton productivity, sustainability, and empowering cotton farmers in these regions.

In Maharashtra, CITI -CDRA is collaborating with the SABC (Sustainable Agriculture and Biodiversity Conservation) to address the Pink Bollworm epidemic in cotton farming to create awareness and providing demonstrations of PB Knot, a vital tool to combat this devastating pest.

Promoting Organic Farming in Maharashtra:

To further support sustainable agriculture, CITI CDRA has joined forces with Zydex company to offer free demonstrations of organic products to 10 selected farmers in Maharashtra. This collaborative project aims to promote organic farming practices and reduce the environmental impact of agriculture.



INTERNATIONAL
COTTON
ADVISORY
COMMITTEE

81st Plenary Meeting

Cotton Value Chain:
Local Innovations for Global Prosperity

*Inspired by the 5F vision of
Hon'ble Prime Minister, Shri Narendra Modi
- Farm to Fibre to Factory to Fashion to Foreign
And aiming towards making Textiles & Apparel Businesses
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CITI Activities...

Boosting ELS Cotton Production in Madhya Pradesh:

With the increasing demand for textile products made from Extra Long Staple (ELS) cotton, CITI CDRA is taking action in Madhya Pradesh. By supplying micronutrient kits and conducting demonstrations, CITI-CDRA is encouraging ELS cotton farmers to enhance production and meet the growing demand for high-quality cotton varieties.

Sustainability Initiatives for Cost Reduction and Soil Health in Rajasthan:

CITI CDRA is committed to sustainability, advocating for the preparation and use of biopesticides made from readily available farm and home products. This initiative not only cuts down production costs but also nurtures soil health, promoting long-term agricultural sustainability.

These efforts have yielded significant results, with an average increase of 22.10% in Cotton productivity in Maharashtra, 19.08% in Madhya Pradesh, and 19.6% in Rajasthan compared to non-project areas. This demonstrates the positive impact CITI CDRA is having on the livelihoods of farmers and the agricultural industry in these regions.

As India celebrates World Cotton Day, CITI CDRA remains dedicated to fostering sustainable agricultural practices, empowering farmers, and ensuring the continued success of the cotton industry and urges all stakeholders to recognize the indispensable role of cotton in the textile industry and pledge to support sustainable cotton cultivation and research endeavours.

CITI BIDS FAREWELL TO PAST CHAIRMAN SHRI T RAJKUMAR

On 27th October 2023, Confederation of Indian Textile Industry (CITI) hosted a farewell function to honor Mr. T. Rajkumar, the Immediate Past Chairman, and introduce the new Office Bearers of CITI.

Mr. Rakesh Mehra, Chairman-CITI highlighted the achievements and acknowledged the significant contributions of Mr. Rajkumar.

The function had an insightful session on "Outlook and Opportunities for Indian Textiles & Apparel Sector," by Economic Law Practice representative.



The function was attended by various Government officials including Textile Commissioner Ms. Roop Rashi, IA&AS and many industry stalwarts who appreciated Shri T. Rajkumar for his commendable work for the Indian Textile Industry during his tenure as CITI Chairman and they all also welcomed the new leadership of CITI and assured their full support in resolving the various issues of industry.



Revolutionizing Natural Fibre Processing in Asia



Cretes, a prominent member of the Valtech Group, is making waves in the textile industry by providing innovative, high-capacity solutions for processing natural fibres such as hemp, flax linen, and kenaf. With a focus on delivering top-notch quality and efficient production lines, Cretes is redefining the way these fibres are processed.

High Capacity and Quality Output

Cretes takes pride in its ability to build processing lines with a capacity ranging from 1 to 10 tons per hour. This modular approach allows for scalable growth, enabling customers to tailor their processing systems to their specific needs. Whether you're a small operation or a large enterprise, Cretes has you covered.

Complete Scutching Systems

One of Cretes' standout offerings is its comprehensive scutching systems for flax and hemp linen. These systems cover everything from harvesting the raw materials in the field to treating by-products like tow, shives and seeds. Additionally, Cretes ensures a clean and efficient production process by incorporating state-of-the-art dust extraction technology. This means that customers can rely on Cretes for a turnkey solution from the field to the final fibre product.



Cretes produces high-quality processing machinery for processing natural fibres such as hemp, flax and kenaf.

Expansion into Asia

Cretes is rapidly growing in the Asian market. This expansion is made possible through their Indian subsidiary, Valvan Soenen India in Khopoli, India. The Valtech Group continues to invest in the region, as to further cement its presence in Asia. The success of Cretes' products can be attributed to their efficiency, as well as the hands-on approach of a local team that understands the unique needs and challenges of the market.

M/s Valvan Soenen India Pvt Ltd:

T: +91 22 2650 1900 - Einfovsi@valtechgroup.eu

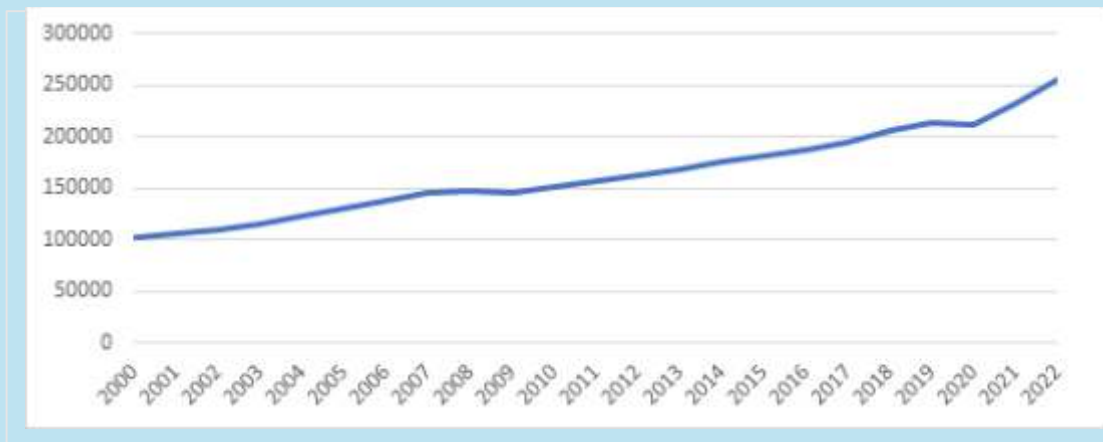
Cretes: T: +32 56 411 094 - Enfo@cretes.be

www.cretes.be

UNITED STATES

With a GDP of about US\$ 23.31 trillion in 2021, United States (US) was the 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), US's nominal GDP is expected to reach the US\$ 26.854 trillions in 2023. The IMF also projects that the US's real GDP will grow by 2.1% in 2023.

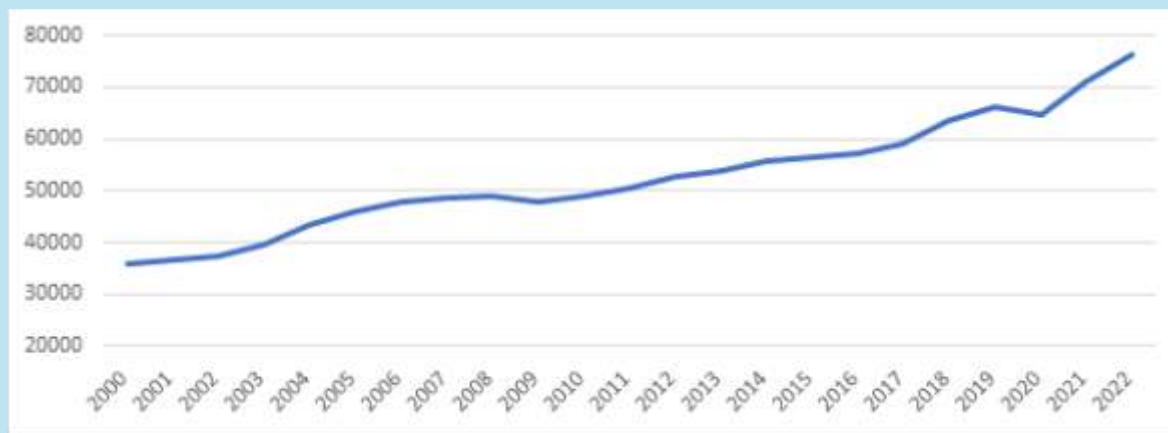
GDP (Current US\$) of US (US\$ Trillion)



Source: World Bank and CITI Analysis

The Gross National Income of US has increased at a CAGR of about 3.1% during the last two decades and is expected to rise further at a faster rate owing to favourable economic conditions. High income makes US a favourable market for Textile Products.

Gross National Income (GNI) Per Capita, of United States (US\$)



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

Overview of the Global Textile & Apparel Trade of US

US is a net importer of Textile and apparel (T&A) products. During 2022, US exported T&A commodities worth about US\$ 30.8 bn to the world which have increased at a CAGR of about 3.2% during 2018-2022 and imported T&A commodities worth about US\$ 145.5 bn from the world which have increased at a CAGR of about 5.1% during 2018-2022.

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

Year	Exports	Imports	Trade Balance
2018	27.2	119.2	-92.02
2019	26.1	119.4	-93.31
2020	22.8	117.3	-94.49
2021	25.6	127.8	-102.23
2022	30.8	145.5	-114.72
CAGR	3.2%	5.1%	

Source: ITC Trade Map & CITI Analysis

Category-wise analysis shows that Apparel was the largest imported T&A category by US from the world and had a share of about 72.39% in US's total T&A imports from the world during 2022 followed by Home Textiles with a share of about 10.53% during the same time frame.

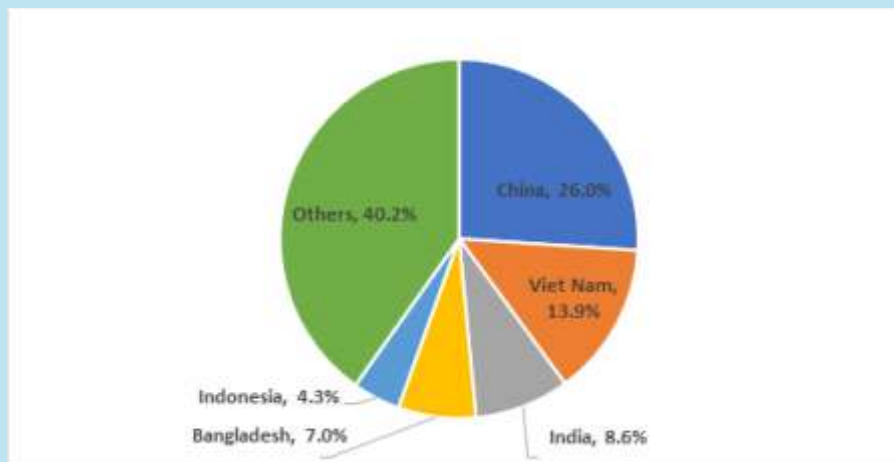
Category Wise Imports of T&A by US in 2022 (US\$ Mn)

Row Labels	2022	Share 2022
Fibre	1.6	1.11%
Filament	1.7	1.13%
Yarn	0.7	0.52%
Fabric	8.1	5.53%
Apparel	105.4	72.39%
Home Textiles	15.3	10.53%
Others	12.8	8.78%
Total	145.5	100%

Source: ITC Trade Map & CITI Analysis

China was the leading supplier of T&A commodities to US and had a share of about 26.0% in US's total T&A imports from the world during 2022 followed by Viet Nam and India with a share of about 13.9% and 8.6% respectively. The top 5 countries accounted for about 40.2% of US's total T&A imports from the World during 2022.

Share of Top Suppliers of T&A Commodities to US during 2022



Source: ITC Trade Map & CITI Analysis

Categorical analysis shows that the top 10 T&A commodities imported by US constitute about 56.7% of US's total T&A imports from the world during 2022. Although the import of HSN 6103 has shown the maximum CAGR of about 14% during 2018-2022, the share of it is 2.4% compared to HSN 6110 which is the highest imported commodity with a share of 12.4% in the same time frame.

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

HS Code	Commodity	2018	2019	2020	2021	2022	CAGR	Commodity Wise Share in 2022
6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted (excl. ...	15.25	15.49	11.63	15.52	18.01	4.2%	12.4%
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, ...	10.36	10.21	7.65	9.02	12.19	4.2%	8.4%
6203	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches ...	8.52	8.46	5.74	7.51	10.24	4.7%	7.0%
6109	T-shirts, singlets and other vests, knitted or crocheted	6.14	6.57	5.09	7.38	9.30	11.0%	6.4%
6104	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, ...	6.20	5.90	4.97	6.92	7.49	4.8%	5.1%
6307	Made-up articles of textile materials, incl. dress patterns, n.e.s.	5.06	5.40	20.60	7.50	7.06	8.7%	4.8%
6302	Bedlinen, table linen, toilet linen and kitchen linen of all types of textile materials (excl. ...	5.97	5.97	5.49	7.55	6.98	4.0%	4.8%
6108	Women's or girls' slips, petticoats, briefs, panties, nightdresses, pyjamas, négligés, bathrobes, ...	3.26	3.19	2.84	4.15	4.30	7.2%	3.0%
6103	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches ...	2.10	2.20	1.94	3.17	3.54	14.0%	2.4%
6205	Men's or boys' shirts (excl. knitted or crocheted, nightshirts, singlets and other vests)	3.51	3.39	2.17	2.24	3.39	-0.9%	2.3%

Source: ITC Trade Map & CITI Analysis

Textile & Apparel Trade Between India and US

India was the 3rd largest supplier of T&A commodities to US in 2022. During 2022, US imported T&A commodities worth US\$ 12,478.92 from India.

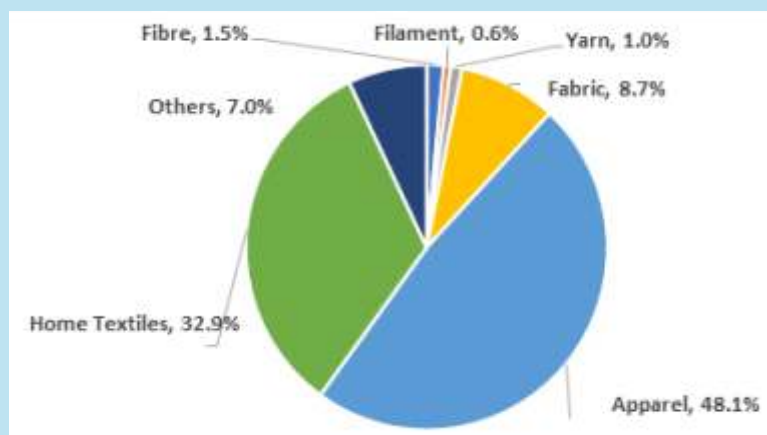
US imports of T&A from India (US\$ Mn)

Row Labels	2018	2019	2020	2021	2022	CAGR
Fibre	124.82	93.79	98.39	174.16	187.27	10.7%
Filament	57.66	57.99	40.87	62.43	80.41	8.7%
Yarn	59.42	55.45	62.92	102.41	126.33	20.8%
Fabric	536.20	554.41	556.97	916.54	1,089.78	19.4%
Apparel	4,023.77	4,255.06	3,201.61	4,490.65	6,004.89	10.5%
Home Textiles	3,236.88	3,262.23	3,089.05	4,550.01	4,110.61	6.2%
Others	458.13	544.88	562.13	852.21	879.63	17.7%
Total	8,496.88	8,823.80	7,611.93	11,148.41	12,478.92	10.1%

Source: ITC Trade Map & CITI Analysis

Category-wise analysis shows that apparel was the largest imported T&A commodity by US from India and accounted for about 48.1% of total T&A imports by US from India followed by Home-Textiles with 32.9% share.

Category Wise Share of US imports of T&A from India



The top 10 commodities imported by US from India accounted for about 58.6% of US's total T&A imports from India during 2022. HSN 6302 was the largest imported T&A category by US from India which accounted for about 18.5% of US's total T&A imports from India.

Source: ITC Trade Map & CITI Analysis

Top 10 T&A Imported commodities by US 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 (excl. ...	1,954.5	1,957.4	1,800.7	2,707.2	2,303.0	4.2%	18.5%
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, ...	552.0	625.9	498.0	694.7	1,122.5	19.4%	9.0%
6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted (excl. ...	514.7	541.5	383.8	571.5	650.8	6.0%	5.2%
5702	Carpets and other textile floor coverings, woven, not tufted or flocked, whether or not made ...	390.2	407.6	409.1	624.6	618.2	12.2%	5.0%
6206	Women's or girls' blouses, shirts and shirt-blouses (excl. knitted or crocheted and vests)	504.0	495.3	342.0	406.7	534.8	1.5%	4.3%
6109	T-shirts, singlets and other vests, knitted or crocheted	268.8	289.9	222.5	370.3	504.3	17.0%	4.0%
6111	Babies' garments and clothing accessories, knitted or crocheted (excl. hats)	178.8	234.7	223.4	348.7	426.3	24.3%	3.4%
6305	Sacks and bags, of a kind used for the packing of goods, of all types of textile materials	232.6	262.6	245.6	361.4	417.9	15.8%	3.3%
6205	Men's or boys' shirts (excl. knitted or crocheted, nightshirts, singlets and other vests)	291.2	283.9	191.1	237.3	376.3	6.6%	3.0%

Source: ITC Trade Map & CITI Analysis

Way Forward:

The textile and apparel industry in the United States 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 US apparel market is approximately worth \$351.40 billion and is expected to grow at a CAGR of 2.3% in the coming years. The largest segment of the market is women's apparel, followed by sports apparel, knitted garment, bed linen and home textiles. The US bed linen market was worth \$17.85 billion in 2023 and is expected to grow by 3.15% and is projected to reach \$40.7 billion. The market is driven by quality demand, online shopping, eco-friendly trends, and innovation.

US is home to a number of fast fashion brands, high-end boutiques, as well as local designer stores. Shein gained more than double market in the United States from March 2020 to 2022, claiming the largest portion of the market. Moreover, online retail has been growing steadily in the US thus making it a lucrative market for T&A products.

The vast textile and apparel market of US provide ample opportunities for India to spread its market share. The market of women's apparel, one of the largest segments of US's textile market, is one such area where India has the chance to increase its market share. Considering the manufacturing capabilities of India, below are some more product categories with considerable potential for India to increase its market share in US:

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

HS Code	Product label	US Imports from the World in 2022	US 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, ...	12,189.2	1,122.5	9.2%	3,096.0
6109	T-shirts, singlets and other vests, knitted or crocheted	9,303.2	504.3	5.4%	2,540.4
6205	Men's or boys' shirts (excl. knitted or crocheted, nightshirts, singlets and other vests)	3,387.0	376.3	11.1%	1,048.2
6211	Tracksuits, ski suits, swimwear and other garments, n.e.s. (excl. knitted or crocheted)	2,998.2	318.5	10.6%	1,010.4

Source: ITC Trade Map & CITI Analysis

CITI ANALYSIS OF EXPORTS AND IMPORTS OF T&A FOR AUGUST 2023

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

Export category	Aug-22	Aug-23	% Change	Apr-Aug'22	Apr-Aug'23	% Change
Cotton Yarn/Fabs./made-ups, Handloom Products etc.	883.90	1,113.67	26.00%	4,994.57	4,881.92	-2.26%
Man-made Yarn/Fabs./made-ups etc.	419.86	412.20	-1.82%	2,183.96	1,963.62	-10.09%
Jute Mfg. including Floor Covering	42.08	32.33	-23.17%	211.96	156.26	-26.28%
Carpet	104.25	117.96	13.15%	604.08	555.55	-8.03%
Handicrafts excl. handmade carpet	145.41	142.46	-2.03%	765.85	670.60	-12.44%
Sub-Total Textiles	1,595.50	1,818.62	13.98%	8,760.42	8,227.95	-6.08%
Apparel	1,233.85	1,133.35	-8.15%	7,105.65	5,969.94	-15.98%
Textile and Clothing	2,829.35	2,951.97	4.33%	15,866.07	14,197.89	-10.51%
All Commodity	37,017.74	34,484.24	-6.84%	1,96,334.85	1,72,948.43	-11.91%
% of T&C in Total Exports	7.64%	8.56%		8.08%	8.21%	

Source: Press Information Bureau

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

Import category	Aug-22	Aug-23	% Change	Apr- Aug'22	Apr- Aug'23	% Change
Cotton Raw & Waste	295.64	74.9	-74.67%	764.1	362.09	-52.61%
Textile yarn fabric, made-ups	264.66	216.02	-18.38%	1,195.08	935.75	-21.70%

Source: Press Information Bureau

QUICK ESTIMATES OF IIP FOR TEXTILE & CLOTHING SECTOR (T&C): JULY 2023

T&C in Index of Industrial Production (IIP): Growth Rates (% , Y-o-Y)							
Sector	Weights	Index			Cumulative Index		
		Jul-22	Jul-23	% Change	Apr- Jul-22	Apr- Jul-23	% Change
General	100	134.4	142	5.7	136.3	142.8	4.8%
Manufacture of textiles	3.2913	107.2	108.2	0.9	110.2	107.4	-2.5%
Manufacture of wearing apparel	1.3225	134.4	104.2	-22.5	140.8	107.4	-23.7%

Source: Press Information Bureau

- For the month of July 23, the Quick Estimates of Index of Industrial Production (IIP) with base 2011-12 stands at **142** which is about **5.7%** higher than IIP of September 22.
- IIP for manufacture of textiles was up by (+) **0.9** percent in July 23 as compared to July 22 and Wearing Apparel was down by (-) **22.5** percent over the same period.

CITI ANALYSIS OF EXPORTS AND IMPORTS OF T&A FOR SEPTEMBER 2023

- During Sep'23, Indian Textiles Exports registered a growth of **11.06%** over the previous year while Apparel Exports registered a degrowth of **-11.23%** during the same time period. However, as compared to Sept'21, both exports of both Textile and Apparel have declined by -23.02% and -27.27% respectively.
- Cumulative Exports of Textiles and Apparel during Sep'23 have registered a growth of 1.77% over Sep'22 while it has declined by about -24.62% as compared to Sept'21.
- During Apr-Sept'23, Indian Textiles Exports registered a degrowth of **-3.59%** over the previous year while Apparel Exports registered a degrowth of **-15.36%** during the same time period. Similarly, as compared to Apr-Sept'21 the exports of Textile and Apparel have declined by 18.37% and 5.69% respectively.
- Cumulative Exports of Textiles and Apparel during Apr-Sep'23 have registered a degrowth of -8.81% as compared to Apr-Sep'22 while the same has declined by about -13.59% as compared to Apr-Sep'21.

CITI ANALYSIS OF EXPORTS AND IMPORTS OF T&A FOR SEPTEMBER 2023

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

Export category	Sep-21	Sep-22	Sep-23	% Change Sep 23/ Sep 22	% Change (Sep 23/ Sep 21)	Apr- Sep'21	Apr- Sep'22	Apr- Sep'23	% Change (Apr-Sep23/ Apr-Sep22)	% Change (Apr-Sep23/ Apr-Sep21)
Cotton Yarn/Fabs./made-ups, Handloom Products etc.	1,310.49	798.98	1,017.84	27.39%	-22.33%	7,294.96	5,793.55	5,899.77	1.83%	-19.13%
Man-made Yarn/Fabs./made-ups etc.	455.84	400.98	372.77	-7.04%	-18.22%	2,687.18	2,584.94	2,336.39	-9.62%	-13.05%
Jute Mfg. including Floor Covering	40.96	34.35	28.89	-15.90%	-29.47%	229.11	246.31	185.15	-24.83%	-19.19%
Carpet	157.83	105.84	113.79	7.51%	-27.90%	871.81	709.92	669.34	-5.72%	-23.22%
Handicrafts excl. handmade carpet	184.95	150.12	121.86	-18.82%	-34.11%	1,023.48	915.97	792.40	-13.49%	-22.58%
Sub-Total Textiles	2,150.07	1,490.27	1,655.15	11.06%	-23.02%	12,106.54	10,250.69	9,883.05	-3.59%	-18.37%
Apparel	1,301.11	1,066.01	946.33	-11.23%	-27.27%	7,333.88	8,171.66	6,916.37	-15.36%	-5.69%
Textile and Clothing	3,451.18	2,556.28	2,601.48	1.77%	-24.62%	19,440.42	18,422.35	16,799.42	-8.81%	-13.59%
All Commodity	33,814.61	35,390.80	34,465.25	-2.62%	1.92%	1,98,250.72	2,31,725.65	2,11,398.04	-8.77%	6.63%
% of T&C in Total Exports	10.21%	7.22%	7.55%			9.81%	7.95%	7.95%		

Source: Press Information Bureau

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

Imports category	Sep-21	Sep-22	Sep-23	% Change Sep 23/ Sep 22	% Change (Sep 23/ Sep 21)	Apr- Sep'21	Apr- Sep'22	Apr- Sep'23	% Change (Apr-Sep23/ Apr-Sep22)	% Change (Apr-Sep23/ Apr-Sep21)
Cotton Raw & Waste	44.02	317.33	39.11	-87.68%	-11.15%	297.25	1081.43	401.2	-62.90%	34.97%
Textile yarn fabric, made-ups	166.47	219.9	201.67	-8.29%	21.14%	897.09	1414.98	1137.42	-19.62%	26.79%

Source: Press Information Bureau

QUICK ESTIMATES OF IIP FOR TEXTILE & CLOTHING SECTOR (T&C): AUG 2023



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

Sector	Weights	Index			Cumulative Index		
		Aug-22	Aug-23	% Change	Apr -Aug 22	Apr-Aug 23	% Change
General	100	131.5	145.1	10.3	135.3	143.5	6.1
Manufacture of textiles	3.2913	105.2	106.9	1.6	109.2	107.2	-1.8
Manufacture of wearing apparel	1.3225	117.8	97.7	-17.1	136.2	105.4	-22.6

Source: Press Information Bureau

- For the month of August 23, the Quick Estimates of Index of Industrial Production (IIP) with base 2011-12 stands at **145.1** which is about **10.3%** higher than IIP of August 22.
- IIP for manufacture of textiles was up by (+) **1.6** percent in August 23 as compared to August 22 and Wearing Apparel was down by (-) **17.1** percent over the same period.

Textile sector Skill Council



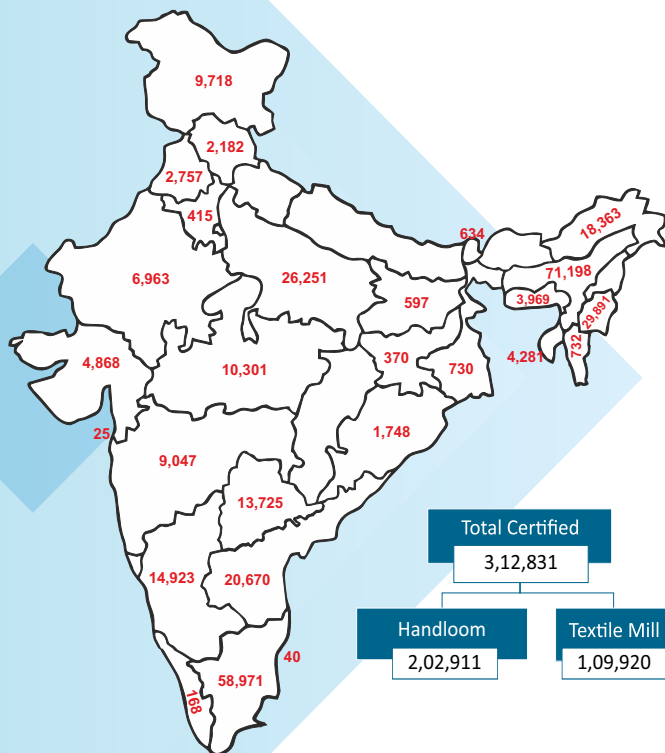
Who we are :-

- 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