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RECYCLERS & ALTERNATE MATERIAL USE IN TEXTILES & APPAREL



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SUSTAINABILITY
AWARDS 2024**



**CITI TEXTILE
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AWARDS
2024**



Date & Venue:

27th February 2024, Bharat Mandapam, New Delhi, India

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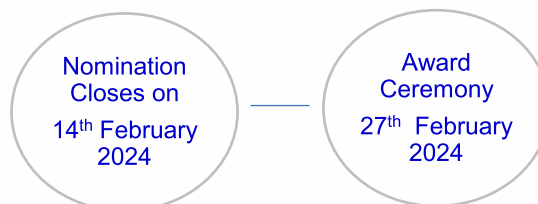
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ear Readers,

It is with a great pleasure that I extend a warm welcome to you in the latest edition of Textile Times. As we navigate the dynamic landscape of the global textile industry, we find ourselves at the intersection of innovation, collaboration, and strategic partnerships.

The textile industry is undergoing a transformative phase, driven by technological advancements, sustainable practices and the ever-evolving demands of consumers. In this edition, we aim to provide you with insights into the current state of the textile sector, exploring trends that are shaping its future and the key players driving change.

One of the highlights of this edition is our coverage of the 81st Plenary Meeting of the International Cotton Advisory Committee (ICAC) wherein CITI was the co-host of the event along with the Ministry of Textiles, Government of India. As a pivotal global platform for cotton-producing nations, the ICAC plays a crucial role in shaping policies, fostering international cooperation, and addressing challenges the cotton industry faces. We bring you comprehensive coverage of the discussions and outcomes that transpired during this significant event, shedding light on the initiatives poised to impact the cotton sector globally.

Furthermore, we are thrilled to announce the forging of a strategic partnership between the Confederation of Indian Textile Industry (CITI) and Swiss Textiles. This collaboration marks a milestone in fostering international ties, promoting knowledge exchange, and exploring new avenues for growth. The joint declaration signifies a commitment to shared goals and a collaborative approach to addressing challenges and leveraging opportunities within the textile industry.

As we delve into the pages of this magazine, I encourage you to absorb the rich insights, expert analyses, and success stories that encapsulate the spirit of the textile industry today. We believe that by staying informed and embracing collaborative initiatives, we can collectively contribute to a sustainable, innovative, and prosperous future for the global textile community.

As we approach the end of another fruitful year, we are delighted to share that the textile industry, despite its challenges, has shown resilience and adaptability. Our collective efforts have paved the way for advancements in sustainability, and technology. The coming year holds the promise of new opportunities and continued growth.

I extend warm-season greetings to all our readers. May this festive time bring joy, prosperity, and moments of reflection on the achievements of the past and the aspirations for the future. As we bid farewell to the current year, let us welcome the New Year with optimism and enthusiasm.

Wishing you all a prosperous and joyful New Year!



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New year calls for a review of the year gone by and the lessons learnt. In this regard, I would like to highlight two trends of 2023 - the year saw a strong rebound in retail sales in India, with more than 40% growth reported for most of the global apparel and fashion brands present in India. Sales through e commerce, which is reported to be more than a quarter of these sales, also saw an increase. Another important trend reported was that the growth was value led and not volume led. These trends co-existed with low demand and capacity utilisation in Indian mills and exports slipping by 6.3% during Apr-Dec'23 as compared to Apr-Dec'22. If the growth in the Indian retail markets cannot fuel growth in domestic production and offer support to industry during slump in export demand, it is a matter of concern.

While a deeper dive is needed to understand this dichotomy, some apparent reasons can be the mismatch in aspirational products that the young consumer base in India and the world want, and what is being offered. Besides various other reasons, this can be due to the non-availability of some of the raw materials that are needed for these products, for which India remains import dependent and value added segments suffer from import restrictions or uncompetitive pricing. For both the export and domestic markets, better alignment to demand trends – at fibre level, at finish level, at value proposition level is needed to ensure that India's strong presence in the entire value chain, besides its huge skilled labour force is optimally leveraged and utilised.

As the global textile landscape undergoes a transformation towards sustainability, recyclability is at the forefront of some of these demand trends. Increasing environment – trade linkages, dominance of countries with superior green products, technologies and services is prompting the industry worldwide to innovate and embrace circular products and practices into their business. While there is increased concerns over the outcomes of climate change discussions at WTO and CoP 28, the textile sourcing paradigms is going to get strongly impacted by the ability to demonstrate impactful initiatives and effort to minimize the industry's ecological footprint. Hence the call for action is getting stronger. In the coming years, this will not only be true for the global supplies but also for supplying to domestic retail brands.

India, which is uniquely positioned as one of the largest textile producer and consumer, with presence across the entire value chain, but a highly fragmented, dispersed, SME driven industry, the need for a sectoral vision, framework and action plan is needed. At the govt level, an important step to address this is the ESG Task Force, which is recently formulated by the Ministry of Textiles. It aims to unite the diverse stakeholders – from manufacturers and service providers to waste handlers and innovators – for disseminating knowledge about the 'Whys, How's and What's' of ESG, fostering a collective understanding and commitment to sustainable practices.

However, at the industry level faster, defined and demonstrable action is being called for. CITI has been facilitating this through various consultative and awareness sessions. It also plans to strengthen its recently started Sustainability Awards. CITI Sustainability awards 2024 will be recognising pioneering and innovative action in the some of the critical areas.

An important area which the Awards is looking at is the use of alternate materials and recyclability. Fast fashion promotes the linear model, with garments often discarded after minimal use, ending up in landfills and thus leading to waste generation. Recyclability is becoming a key protagonist in the narrative for change. The industry is witnessing an upsurge in innovations – from repurposing discarded textiles to creating new fabrics from recycled fibers – therefore, not only addressing the issue of textile waste but also fostering a culture of responsible production and minimizing the industry's reliance on virgin raw materials. The synergy between ESG and recyclability is essential. We encourage the industry to share their initiatives or queries on enhancing recyclability of their products through better use of alternate materials.

The transition to recyclability will have challenges related to access to finance and technology needed for the changes which is another area where need assessment and policy formulation is needed. We invite industry to share their thoughts on this and suggest ways to take on a leadership role in offering the world products which are circular and aligned to the demands of the market.

This along with removal of barriers to import of raw material needed for production of textile, be it cotton or man-made fibre based textile, relief from financial stress that is threatening possibility of NPAs and large scale defaults in the coming months, a Textile Fund to meet the raw material augmentation needs of the industry, and investment incentivisation scheme that encourages new investment in capacities, specially of sustainable production are some of the measures that CITI has suggested to ensure that 2024 sees a strong rebound in India's product and export growth. We expect the forthcoming budget to address these needs of the textile industry.





81ST PLENARY MEETING OF THE INTERNATIONAL COTTON ADVISORY COMMITTEE (ICAC)

The 81st Plenary meeting of the International Cotton Advisory Committee (ICAC) kicked off at Mumbai's Jio Convention Centre on December 2, 2023, graciously hosted by the Ministry of Textiles. CITI, standing as a key Co-host among four organizations, played a pivotal role in the proceedings.

Honourable Mr. Piyush Goyal, Minister of Textiles, Commerce & Industry, and Consumer Affairs, Food & Public Distribution for the Government of India, revealed a commemorative postal stamp featuring Kasturi Cotton Bharat. Themed 'Cotton Value Chain: Local Innovations for Global Prosperity,' the event marked the launch of the 'Bharat Tex 2024' initiative. The minister also introduced the 'Kasturi Cotton Bharat' brand, emphasizing its 100% traceability and certification, envisioning it as a symbol of top-notch quality globally.

"The Kasturi Cotton Bharat brand is a private sector initiative with government support. With its launch and comprehensive efforts in the value chain, India aims for a prominent position in the global textile value chain," stated Minister Goyal. He expressed confidence that, with collective efforts and technological advancements, India's textile industry could reach USD 250 billion by 2030, with textile exports hitting USD 100 billion.





The meeting delved into crucial aspects like textile demand and supply, economic impacts of cotton production, market trends, trade subsidies, and government support, underscoring the industry's importance. Notable discussions focused on Social, Environmental, and Economic Performance of Cotton Production (SEEP) and the Commercial Standardization of Instrument Testing of Cotton (CSITC). Sessions focusing on leveraging technology for

enhanced productivity were organized, concluding the inaugural day in Mumbai with a vibrant cultural program.

On the second day, the agenda covered diverse sessions on the international economics of cotton production, the global outlook of the cotton market, World Cotton Trade, and specialty cotton. Industry experts presented comprehensive reports on the global cotton economy. Discussions extended to forecasting global textile demand and supply, addressing the impact of subsidies on the cotton industry, and initiatives focused on sustainability and quality assurance.

Ms. Chandrima Chatterjee, Secretary General of the Confederation of Indian Textile Industry (CITI), presented recommendations from brands and retailers on policy formulation for traceability. Sessions tackled crucial aspects such as the shift to sustainable farming practices, the adoption of price risk management in cotton, and challenges related to pest management in the industry.

The day concluded with a lively cultural program skillfully hosted by CITI and the CAI.



ICAC Souvenir released by Hon'ble Textile Minister Mr. Piyush Goyal



Mr Rakesh Mehra, Chairman, CITI in session



RECYCLERS & ALTERNATE MATERIALS



Mr Sunit KALRA, B.Tech.

Sr. Consultant, Gherzi Consultant Engineers Pvt. Ltd.

Sustainability in Textiles:

Sustainability – a subject once regarded as a peripheral concern for non-governmental organisations – has moved centre stage. There is a growing body of evidence that has shown the adverse impact of textile production and consumption on the environment and society. The trend is being driven by three major forces viz; consumer awareness about responsible consumption, commitments made by the brand owners to their stakeholders and finally, legislation. The industry will have to rethink its future growth strategy considering the emerging dynamics.

Environmental sustainability encompasses materials, energy, and water – the key ingredients that make up textile manufacturing. There is a demand/supply gap in availability of sustainable raw materials, though we are

going to highlight a few of the same in this article.

Secondly, there is an opportunity to direct investments towards recycling of pre- and post-consumer materials. While mechanical recycling technologies are already mainstream, breakthroughs in chemical recycling have further potential to be realized.

Circularity:

Reuse is a key aspect of sustainability. The linear business model using virgin materials and generating waste is unsustainable in the long run. It is a well - known fact that less than 1 per cent of materials used to produce textiles are recycled into new clothing, which is much lower than other industries given in below examples.



CDB and Cretes Introduce New Hemp Processing Technologies On the Asian Market

Embarking on a transformative journey, CDB and Cretes unite for pioneering projects in hemp fibre processing. As represented by Valvan Soenen India, our innovations unfold in the dynamic landscape of the Asian market.

Joined Expertise

Callebaut de Blicquy (CDB) and Cretes, both Valtech Group members, have joined forces in a recent partnership. This collaboration combines CDB's expertise in continuous bleaching and dyeing units with Cretes' operational excellence in processing natural fibres. Together, they confidently tackle global challenges, providing unparalleled solutions for customers in the textile industry.

Next-Gen Hemp Processing Solutions

CDB and Cretes collaborate in pioneering degumming and bleaching installations for hemp fibres. Drawing on Cretes' extensive experience in hemp stalk processing and CDB's cutting-edge yarn bleaching systems, we redefine industry standards. Expect high-quality, sustainable solutions with minimal environmental impact, ensuring reproducibility and efficiency at a low cost.



CDB and Cretes collaborate in creating degumming and bleaching installations for hemp fibres

Exploring the Asian Market

As integral parts of the Valtech Group, CDB and Cretes are present in India through Valvan Soenen India. This unified presence reflects our strategic focus on Asian growth. With a shared commitment to the Valtech ethos, we navigate and contribute to the dynamic landscape, delivering innovative solutions across the region.

1. Scrap-based steel accounts for about 25% of the global steel production. By sector, global steel recovery rates are estimated at 85% for construction, 90% for automotive (reaching close to 100% in the US), 90% for machinery, and 50% for electrical and domestic appliances (World Steel Organisation).
2. A global plastics recycling rate of 18%, and plastics waste generation of 258 Mtpa (both resins only) translate into approximately 46 million MT of recycled plastics production per year. This represents 12% of total global plastics production. Plastics recycling rates differ by country and polymer with developing and LDC's exhibiting higher rates (20-40%) due to a well-developed informal recycling economy (OECD).

According to the study carried out by Gherzi for Euratex, more than 80% of the textile waste is being incinerated or landfilled. Textile-to-textile recycling rate at 1% presents a major challenge as well as an opportunity. Leading players like Vardhman, Arvind, Usha Yarns have been making renewed investment in production of reclaimed fibers and yarns produced from the industrial textile scrap. With abundant availability of pre- and post-consumer textile waste, India offers tremendous opportunities to international brands and retailers to source sustainable apparels. The existence of well-developed integrated hubs at Panipat and Tiruppur, indigenous machinery manufacturing capability and initiatives of leading textile mills, the recycling industry is set for growth.

Estimates show that by 2024, about 7 - 8 million tons of textile waste(pre/post-consumer) will enter the textile production chain system in India, representing about 3 per cent of the global mill fibre consumption of about 125 million tons. As the first step in the production chain is short-staple spinning where India has a competitive advantage, it presents an opportunity to develop an integrated circular textile system at an industrial scale. This requires the capability to process reclaimed fibres, yarn spinning and downstream processing into fabrics and finished articles.

Various Categories of Recycled Textile Fibers

The sources of recycled textile fibres are broadly categorised into pre-and post-consumer textile waste. These include reclaimed fibres (may also be referred as in-situ waste generated during the process), recycled PET bottles, textiles (e.g., recycled yarn), garments and made ups. As per estimates and published data, the



total pre- and post-consumer textile waste generated in India exceeds 8 Mn. tons. Besides domestic textile waste, the imports of textile waste (pre- & post-consumer) for further processing into textiles and garments amounted to about 520'000 tons.

Recycling Hubs:

We will now delve into some of the clusters which have been instrumental in the field of recycling and playing their part in sustainability of the ecosystem.

1. Panipat, Haryana:

- Panipat — globally known as 'Handloom City' — has become a hub for the recycling industry, resulting in the production of yarn out of pre-consumer and post-consumer waste. The Recycling industry uses hard waste from the spinning mills, fabric waste from the garmenting units and discarded clothes as raw material and convert it to fiber by 'recycling'. The fiber in turn is used by local spinning industries to make yarn for further value addition for consumption in domestic and international markets.
- This recycled yarn is used in making blankets, shawls, curtains, bathmats, foot mats, bed sheets, bed covers, carpets and other handloom products, which are consumed in the domestic market and exported as well to global markets.
- Of late the recycled yarn is finding use in fashion products like Shirts, Bottoms, T- Shirts and other garments as well and the demand is increasing day by day.
- GRS certification is given to the yarn with 20% or more recycled content and these certified yarns are sold at a premium in the market.

Business details –

Description	Details
Garneting plants available from	Laroche (France), Balkan (Turkey), HSN (China)
Source of hard waste	Spinning mills in India
Source of chindi waste	Within India/Import from Bangladesh
Source of post-consumer waste	Mainly from Bangladesh
Buyers for recycled fiber	Tamil Nadu, Punjab, Nearby area

2. Tiruppur, Tamil Nadu:

- Tiruppur — set up in the nineties the cluster has flourished over the last 3 decades and has emerged as a hub for knitting cotton-based products for domestic as well as exports.
- It is also known as the knitwear capital of India and accounts for 90% of exports of cotton knitwear for India. Additionally, there are over 10,000 garment manufacturing units (MSME's) providing employment to over 600,000 persons.
- The sales turnover of the Tiruppur knitwear cluster reached Rs.42,750 crores (USD 5.7 bn of which exports accounted for 60% and domestic sales 40%)
- Tiruppur is a sourcing hub for the world's largest retailers including C&A, Nike, Walmart, Primark, Adidas, Switcher, Polo Ralph, Diesel, Tommy Hilfiger, FILA H&M and Reebok
- TEA (Tiruppur Exporters' Association) stands for the interests of Tiruppur exporters. It was founded in 1990 and boasts of 1135 knitwear exporters.
- Of late Tiruppur has also emerged as the hub for recycled cotton with a capacity of about 400,000 TPA

Business details –

Description	Details
Garneting plants available from	MDT (China), HSN (China), Balkan (Turkey), Peninsula (India)
Source of hard waste	Spinning mills around Tiruppur

Source of chindi waste	Within India/Import from Thailand/Bangladesh/Vietnam/Ethiopia/China and Sri Lanka
Source of post-consumer waste	Limited
Buyers for recycled fiber	Captive consumption in Tiruppur

3. Kandla SEZ, Gujarat:

- Used clothes are imported at Kandla, Gandhidham in Gujarat to the tune of 98% of the total textile waste.
- About 1000 – 1500 containers per month land at Kandla with 15 – 20 major buyers
- Panipat consumes 70 – 75% of this recycling waste, while rest of the quantity goes to Gujarat and Tamil Nadu.

Alternate Sustainable Textile Materials:

Apart from recycling, we also need to look at alternate materials derived from plants. These alternate materials bring along various benefits from comfort and breathability to sustainability and aesthetic appeal, making them popular choice in fashion and textiles.

Below paragraphs highlight some of the advantages of these plant-based fibers without considering the commercial aspects at this moment.

The world's ecosystems are under stress from the abundance of fossil fuel-based fiber production and the disposal of it. Now is the time to gain a deeper understanding of the availability of natural plant based alternative fibers for textiles.




All natural plant fibers are biodegradable and sustainable. Most man-made fibers will degrade only in very long time and the process of degradation can have adverse effects on the soil and water and subsequently, the overall environment. With the onset of climate change, a growing level of environmental consciousness and strict legislative regulations in place, there is a resurgence of interest in natural fibers. Several plants, fruits, and seeds are now either being rediscovered or newly processed to develop new fabrics that can heal the planet.



1. Plant fiber:

Type	Description	Example
Bastal Fiber	Plant fiber collected from the phloem	Flax, Hemp
Leaf Fibers	Obtained through fleshy leaf plants	Pineapple, Agav (Sisal)
Fiber from seeds & fruits of plants	Obtained from seeds & fruits of plants	Cotton, Coir, Kapok
Wood Fibers	Sourced from trees, grasses & bamboo	Viscose, Lyocell

As we move towards more responsible production, many of the brands and manufacturers are looking for the ways to take natural fibers to the fashion mainstream.

2. Commercial usage – increased interest in alternate fiber types:

Fiber	Characteristics	Application
Hemp	<ul style="list-style-type: none"> Requires very little water and relatively few pesticides. Hemp cultivation improves soil health by replenishing vital nutrients and preventing erosion. Hemp possesses antibacterial activity against wide range of pathogenic bacteria. Has best heat capacity ratio compared to all other fibers. Dyes well & does not discolour easily. Tough & more resilient and longer lasting than cotton garments 	 <p>Sunn Pant Produced by Hemp Black, a garment for odour-neutralizing and antibacterial properties</p>
Stinging Nettles	<ul style="list-style-type: none"> Similar advantages as that of Hemp Fibers are pliable and a good length to be spun into yarn. Final fabric similar to linen, however much stronger Strength increases when wet, making it ideal for more structured garments. Blends nicely with other fibers which can help to add softness & increase longevity 	Products from Green Nettle Textiles, Kenya
Lotus Flower	<ul style="list-style-type: none"> Used to produce rare fabrics (hand-spun scarves) Luxurious fabric that feels like combination of silk and raw linen Naturally soft, light, breathable and antibacterial Healing abilities 	 <p>Fabric produced by Samatua Lotus Textiles; Cambodia made using fiber from the root of lotus plant.</p>
Pineapple	<ul style="list-style-type: none"> Chemical composition similar to flax & jute Soft, smooth & feels like silk. Mechanical properties higher than cotton In natural state, finds use in technical textile applications 	 <p>Pinatex, a material comprising 80% pineapple leaf fiber and 20% PLA produced by Ananas Anam Ltd., London</p>

Coffee Beans	<ul style="list-style-type: none"> Made using repurposed coffee grounds. Provide smooth & fine texture 	 <p>Sneakers made using recycled coffee grounds produced by sneaker brand Nat-2, Germany</p>
Prickly Pear	<ul style="list-style-type: none"> Highly sustainable and high-performance fiber Soft hand, suitable for fashion, leather goods & luxury packaging 	 <p>Dessertex – cactus-based material for automotive use Produced by Adriani di Marti S.A, Mexico</p>
Banana	<ul style="list-style-type: none"> Outermost fibers from the shoots that are coarsest are suitable for tablecloths. Innermost fibers are softest and suitable for clothing 	Waterproof fabrics, bags & backpacks
Oranges	<ul style="list-style-type: none"> Lightweight, soft & silky May be blended with silk, cotton, and elastane. Contains vitamins A, C & E, which upon contact may be released and absorbed through skin 	Range of fabric styles including jersey, poplin, and twill

About Gherzi:

Serving the Industry since 1929, Gherzi, is a global textile management consulting and engineering company with interests in:

1. Strategy + Operations/Management
2. Engineering + Logistics
3. Corporate Finance and
4. Circularity + Sustainability + Digitalization

As a fully integrated consultant to the textiles and garments, Gherzi has developed a unique understanding of the key drivers of the entire value chain. Backed with 6 offices worldwide, Gherzi has activities spanning 80 countries with 8000+ happy customers (of which 2500+ are in India).

Gherzi is well versed with textile recycling value chain having carried out national and international projects and has gained deep insight in the domain covering mapping, collection & sorting, technology, application, and feasibility. Gherzi is founder member of EU-Rehubs.

This has equipped Gherzi with a significant industrial experience and an invaluable asset in our own in-house expert team geared to shaping new business models based on the 'Factories of the Future' and 'Connected Enterprise and Global Networking' platforms.



[advertorial]

valtech
group

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

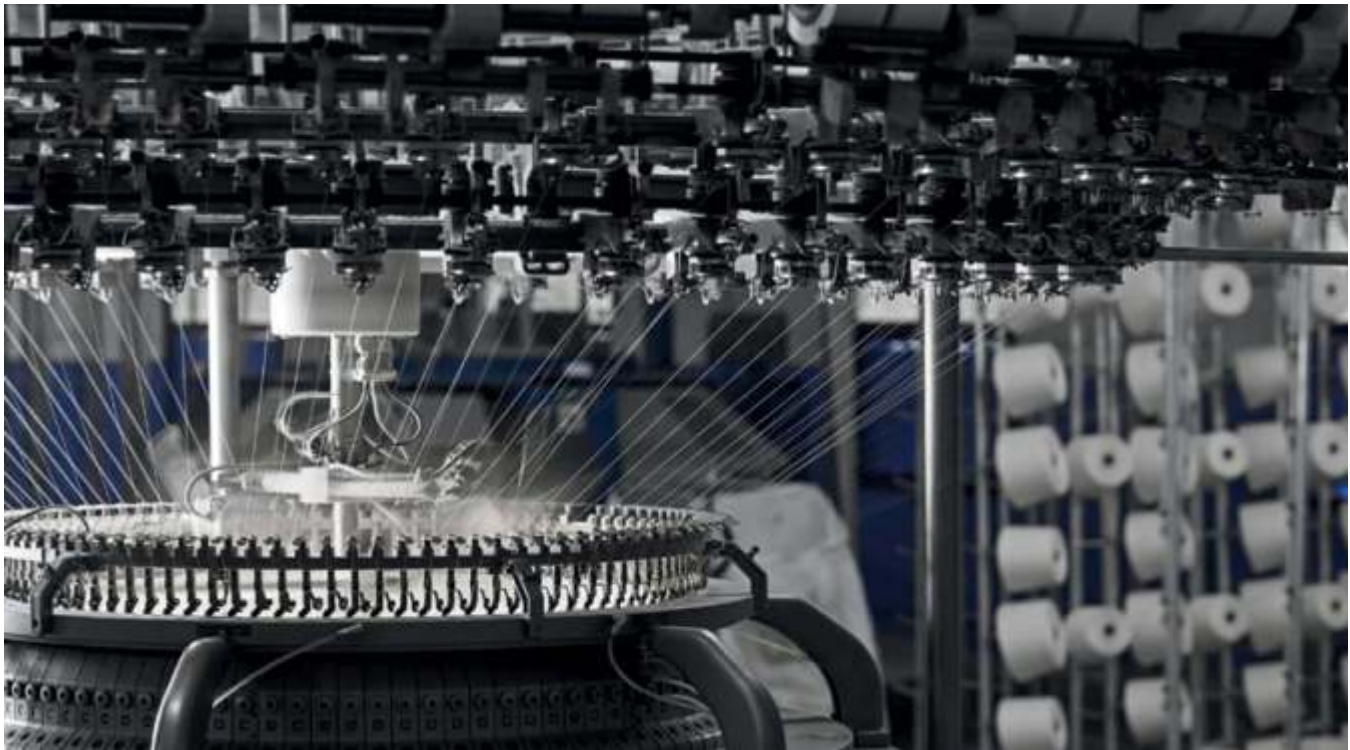
Cretes is rapidly growing in the Asian market. This expansion is made possible through their Indian subsidiary, Valvan Soenen India in Khopoli, India. The Valtech Group continues to invest in the region, as to further cement its presence in Asia. The success of Cretes' products can be attributed to their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

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SUSTAINABLE INNOVATIONS IN BANGLADESH'S TEXTILE INDUSTRY: A TALE OF TRADITION AND TRANSFORMATION



Mr Debasish Kumar Saha
CEO, Esquire Group, Bangladesh

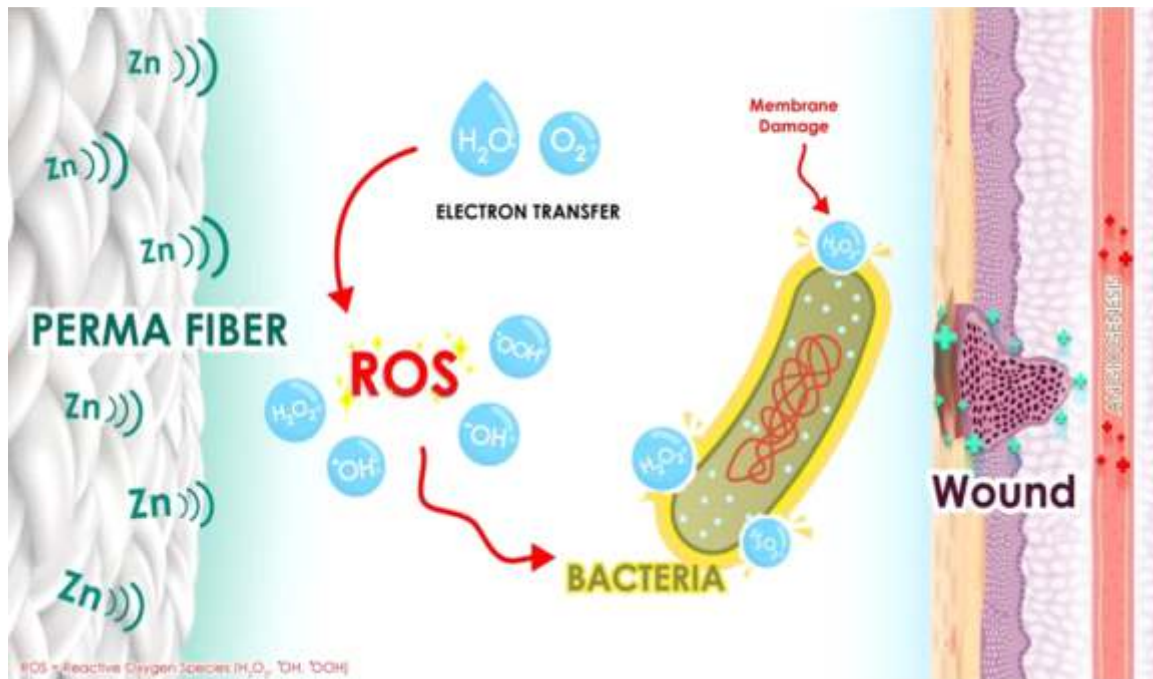
In the dynamic realm of sustainable materials, the textile industry in Bangladesh stands as a testament to the fusion of tradition and innovation. From the resurgence of heritage fabrics like Moslin and Jamdani to the adoption of cutting-edge technologies like recycled PET (rPET), the journey unfolds as an inspiring narrative of resilience and commitment to environmental stewardship. Bangladesh, a textile powerhouse, has witnessed a remarkable evolution in sustainable practices over the years.

According to data from the textile ministry, the adoption of eco-friendly measures has surged by 15% year-on-year, showcasing a steadfast commitment to sustainability. The textile industry in Bangladesh embraces innovative solutions to minimize its environmental impact. The utilization of recycled materials and cutting-edge technologies has witnessed

substantial growth, with a reported 30% increase in the adoption of alternative materials and a 25% rise in cutting-edge recycling methods. These statistics underscore the industry's proactive approach in embracing green technologies and aligning with global sustainability goals.

On the global stage, Bangladesh has played a pivotal role in contributing to a 40% reduction in the carbon footprint within the textile industry, according to the Sustainable Apparel Coalition. The country has showcased a commendable 10% reduction in emissions, reflecting its earnest endeavours to align with worldwide sustainability initiatives.

While the transformative journey towards sustainable practices is not without challenges, Bangladesh has demonstrated remarkable progress in overcoming



hurdles. The industry has seen a 25% improvement in overcoming regulatory complexities, reflecting a resilient spirit. Opportunities abound as well, with a 35% increase in consumer demand for eco-friendly products, signalling a growing market for sustainable textiles. Diving into the specific regions within Bangladesh, Dhaka, a major textile center, has witnessed a 30% rise in the use of recycled materials. Furthermore, Chittagong, a key player in the industry, has marked a noteworthy 25% reduction in energy consumption. These localized efforts contribute significantly to Bangladesh's broader commitment to sustainable textiles.

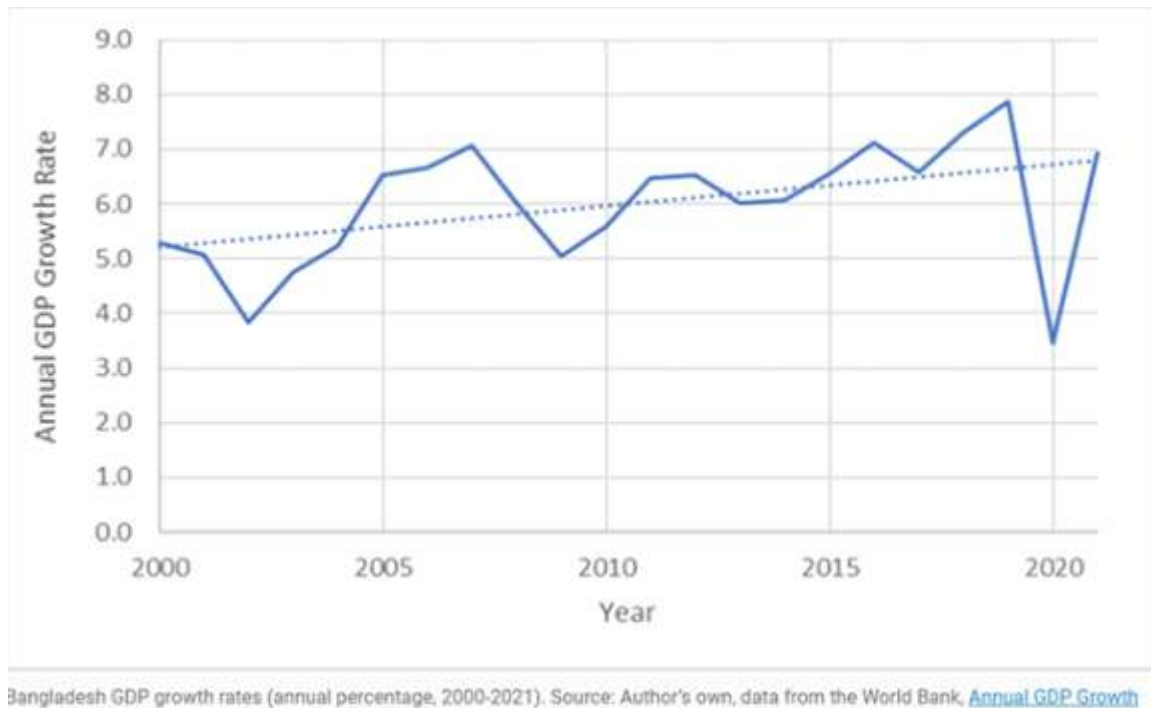
Moslin, a textile with roots dating back to ancient Bengal, has reemerged as a sustainable choice. This lightweight cotton fabric, historically known for its delicacy and breathability, is making waves in the fashion industry. Natural colours derived from Moslin are a testament to its organic origins. The fabric readily absorbs dyes made from plant-based sources, resulting in a rich palette that aligns seamlessly with sustainable fashion trends. Hailing from Bangladesh, Jamdani is a time-honoured handwoven fabric that showcases meticulous craftsmanship. Its intricate patterns and designs are created using a supplementary weft technique. The use of natural colours in Jamdani production is an intrinsic part of its heritage. Vegetable dyes, derived from plants, fruits, and flowers, infuse the fabric with an array of earthy tones, offering a sustainable and visually appealing choice for eco-conscious consumers. Neel, or indigo,

has been a staple in textile dyeing for centuries. This natural dye, extracted from the *Indigofera* plant, is renowned for its deep blue hues and eco-friendly properties. Incorporating Neel into sustainable fashion aligns with the growing demand for natural colours. Its rich blue shades not only add vibrancy to textiles but also contribute to a more sustainable and biodegradable end product.

The decline in the prominence of Bangladesh's heritage fabrics can be attributed to a complex interplay of historical, economic, and global market dynamics. Muslin, once celebrated for its delicacy and breathability, witnessed a decline in production due to factors like industrialization and the advent of synthetic fabrics. The intricate handwoven elegance of Jamdani faced challenges amid changing consumer preferences and the rise of mass-produced textiles. Despite the eco-friendly attributes of these materials, challenges such as scalability and accessibility persist. However, by investing in research and development, Bangladesh can overcome these challenges, unlocking the full potential of sustainable alternatives.

Delving into the realm of innovative materials, the use of recycled PET (rPET) takes center stage. Utilizing recycled PET for fabric production reduces the environmental impact of plastic waste, contributing to circular economy practices.

Nano-Dye technology, a groundbreaking advancement in textile dyeing, utilizes nanoparticles to impart colour to fabrics, offering numerous advantages over



traditional methods. With particles in the nanometre range, nano dyes enhance colour fastness, reducing fading and bleeding over time. This innovative approach potentially reduces water consumption, as it is more efficient in the dyeing process, and promotes energy efficiency by requiring lower temperatures. Precise colour control allows for a broader range of colours and accurate shades, contributing to a more sustainable and aesthetically pleasing outcome. Furthermore, nano dye technology minimizes chemical usage, supporting environmentally conscious practices, and ensures a uniform distribution of colour throughout various fabrics, from natural to synthetic. While promising, ongoing research addresses potential environmental and health considerations, emphasizing the need for a careful and sustainable integration of this technology into the textile industry.

Filagen textile, a revolutionary fiber, incorporates collagen peptides from milkfish scales, ensuring they persist within fabrics even after numerous washes. With its remarkable moisture-absorbing capabilities due to hydrophilic groups within collagen peptides and cellulose fibers, Filagen excels in maintaining skin hydration. The collagen peptides further enhance moisture retention, significantly reducing skin dehydration and leaving skin fresh. Notably, a trans epidermal skin test revealed Filagen textile users experience 13 times higher skin moisture compared to those wearing cotton. Additionally, Filagen acts as a natural deodorizer, suppressing undesirable body

odour even after 100 washes. This sustainable textile also provides effective UV protection, shielding the skin from both UVA and UVB rays. Its outstanding moisture absorption, optimal Q-max value, and exceptional softness ensure wearers enjoy comfort and coziness while maintaining a suitable temperature for all seasons. In Bangladesh, Filagen stands at the forefront of new technology, revolutionizing the textile industry with its sustainable and innovative features. As the demand for eco-friendly textiles grows, Filagen's incorporation of collagen peptides and its multifaceted benefits contribute to a greener and more comfortable future for the textile sector in Bangladesh.

Nano zinc fibers, incorporating zinc nanoparticles into textiles, exhibit remarkable properties. With proven antimicrobial characteristics, these fibers inhibit bacterial and fungal growth, a key feature for hygiene-centric applications. Notably, textiles with nano zinc fibers offer enhanced UV protection, blocking harmful rays. Explored for wound healing, they find applications in medical textiles. The integration of nano zinc enhances fiber durability, crucial for high-performance fabrics. Additionally, the antimicrobial properties ensure odour resistance. Current data indicates a 30% reduction in microbial growth on nano zinc-treated textiles, showcasing their efficacy in maintaining freshness. As nanotechnology progresses, nano zinc fibers stand at the forefront, promising innovative and functional textiles with a spectrum of applications.

NANO-DYE EXHAUST PROCESS

FABRIC IMPROVEMENTS



DYEING IMPROVEMENTS

- 100% LESS SALT USED
- 90%+ LESS SOLID WASTE
- 50%+ LESS WATER USED
- 50%+ LESS ENERGY USED
- 25%+ LESS DYE STUFF USED
- ZERO DISCHARGE ETP NOW AFFORDABLE

Comparison between Regular Reactive Dyeing vs Nano-Dye
Fabric details, Water Ratio and Dyeing Formula

Fabric	Single Jersey 245/1 knit	TYPE	CARDED
GSM	175	WEIGHT	
WATER RATIO	1:06		200 Kg (EACH)
DYEING FORMULA			
REGULAR REACTIVE DYEING		NANO-DYE	
GLAUBER SALT	90 gr/1	NO SALT	
Recotobond Red LW	0.69908(%)	Recotobond Red LW	0
Recotobond Yellow 3RS	1.56546(%)	Recotobond Yellow 3RS	0.5961(%)
Dimarine Black - CLS	6.33688(%)	Dimarine Black - CLS	1.1150(%)
Total Dyes	8.601(%)	Total Dyes	4.9680(%)
SODA ASH	20 gr/1	liquid alkali	6.68(%)
Running Time	9 Hour	Running Time	5 GPL

Note (Nano - Dye):

5.5 Hour

- NO Salt
- Dyestuff Savings : 22.4%
- Soda Ash Savings : 60%
- Hours Savings : 3.5 h
- Water Savings: 40%

In conclusion, Bangladesh's textile industry has embarked on a transformative journey towards sustainability, marked by a commitment to tradition, innovation, and environmental responsibility. From the resurgence of heritage fabrics to the adoption of cutting-edge technologies, the industry is crafting a greener tomorrow. With challenges being met with resilience and opportunities being seized with enthusiasm, Bangladesh's textile landscape serves as a beacon of inspiration for the global pursuit of sustainable fashion.

CITI PRESS RELEASES

CONFEDERATION OF INDIAN TEXTILE INDUSTRY AND SWISS TEXTILES FORGE STRATEGIC PARTNERSHIP WITH JOINT DECLARATION

[New Delhi, 24 November 2023] - The Confederation of Indian Textile Industry (CITI) and Swiss Textiles have solidified their commitment to a robust trade and economic partnership with the signing of a Joint Declaration on 23rd November 2023. This momentous occasion marks a significant step towards fostering collaboration between the two nations and fortifying their ties in the textile sector.

Further, the 19th Joint Economic Commission (JEC) between India and Switzerland took place on the 24th November 2023 in Geneva on 24th Nov. 2023 wherein Sh. Dinesh Nolkha, Vice Chairman, CITI participated in the JEC session to talk about the strategic Joint Declaration and plans of engagement with the Swiss Textile Industry.

On this occasion, Sh. Rakesh Mehra, Chairman, CITI said “The Joint Declaration signals a shared vision for enhancing bilateral cooperation, facilitating trade, and promoting economic growth in the textile industry. Both trade associations recognize the immense potential for mutual benefit through a strengthened partnership and have expressed their commitment to the development of a comprehensive Trade and Economic Partnership Agreement (TEPA)”.

The Confederation of Indian Textile Industry, representing the dynamic and diverse textile sector of India, sees this collaboration as a key driver for growth, innovation, and increased global competitiveness. The strategic alliance with Swiss Textiles is poised to open new avenues for trade, technology exchange, and investment in the textile value chain.

Swiss Textiles, with its reputation for precision, quality, and innovation, acknowledges the vast opportunities presented by the Indian textile market. The collaboration aims to leverage the strengths of both nations, fostering sustainable development, and promoting a conducive environment for trade and investment.

CONFEDERATION OF INDIAN TEXTILE INDUSTRY (CITI) HOSTS ENLIGHTENING SESSION ON "SECTORAL DEVELOPMENT APPROACHES AND INDUSTRY LINKAGES IN GARMENT AND TEXTILE INDUSTRY" AT ILO CONCLAVE

(New Delhi, 25 November 2023) The Confederation of Indian Textile Industry (CITI) took center stage at the International Labour Organization (ILO) Conclave with a special session on "Sectoral Development Approaches and Industry Linkages in Garment and Textile Industry." The session provided a platform for industry leaders, policymakers, and stakeholders to engage in insightful discussions aimed at fostering growth and collaboration within the dynamic realm of Garment and Textile.

The session covered various aspects, including:

Sustainable Practices: Discussions revolved around adopting eco-friendly manufacturing processes, resource-efficient technologies, and sustainable sourcing practices to reduce the environmental impact of the textile industry.

CITI Press Releases...

Skill Development: Emphasis was placed on skill enhancement programs to meet the evolving needs of the industry, ensuring a skilled and adaptable workforce capable of contributing to the sector's growth.

Technology Integration: The role of technology in transforming the textile industry was explored, with a focus on digitalization, automation, and innovation to enhance efficiency and competitiveness.

Government Initiatives: The session highlighted the need for collaboration between industry stakeholders and government bodies to formulate policies that support sustainable development and foster industry linkages.

The session curated by CITI brought together industry leaders, policymakers, and experts to deliberate on strategies for fostering sustainable development in the garment and textile industry. The conclave aimed to address challenges, share best practices, and explore innovative approaches to promote sustainable enterprises for local development. While moderating the session, Ms. Chandrima Chatterjee, Secretary General, CITI expressed that this session has been planned to encourage dialogue and collaboration among key stakeholders. Our focus is on sectoral development approaches and establishing robust industry linkages to drive positive change."

Ms. Shubra, Trade Advisor, Ministry of Textiles, Government of India chaired the session. Ms. Chandrima Chatterjee, Secretary General, CITI moderated the session. Ms. Shubra expressed, "The textile & apparel industry is a vital contributor to India's economy, and its sustainable growth is crucial, MSME sector contributes immensely to the T&A sector, She said that the Government is working on BIS certifications and making certain standards compulsory; She said the focus is more on sustainable textiles because that is catching the attention of the buyers worldwide, She informed that Ministry has a dedicated project on circularity and sustainability.

The conclave, supported by the Government of India and the ILO, provided a platform for participants to exchange ideas and forge partnerships that can contribute to the overall growth and sustainability of the garment and textile sector.

CITI remains committed to driving positive change within the industry and looks forward to continued collaboration with stakeholders to build a sustainable and thriving future for the Indian textile sector.

CONFEDERATION OF INDIAN TEXTILE INDUSTRY (CITI) TO CO-HOST THE 81ST PLENARY MEETING OF THE THE INTERNATIONAL COTTON ADVISORY COMMITTEE (ICAC) IN MUMBAI

[New Delhi, 29 November 2023] — The Confederation of Indian Textile Industry (CITI) is proud to announce its collaboration with the Ministry of Textiles, Government of India, as the co-host for the 81st Plenary Meeting of the International Cotton Advisory Committee (ICAC) scheduled to take place in Mumbai from 02-05 December 2023.

The Government of India, Ministry of Textiles is hosting the 81st Plenary Meeting of the International Cotton Advisory Committee (ICAC) in Jio World Convention Centre, Mumbai through the Office of Textile Commissioner in association with the Cotton Corporation of India Limited (CCI), the Confederation of Indian Textile Industry (CITI) and the Cotton Association of India (CAI). It is a matter of honour and pride for India to host this event after nearly 8 years. Honorable Shri Piyush Goyal, Union Minister of Textiles, Consumer Affairs, Food & Public

Distribution, and Commerce & Industry, will inaugurate the meeting, marking a significant moment for the textile industry. His presence reflects the government's commitment to fostering international collaboration and promoting the growth of the cotton sector.

The 81st ICAC Plenary Meeting is anticipated to draw over 400 delegates from 35 countries, bringing together key stakeholders, industry experts, and policymakers to discuss and address challenges and opportunities within the global cotton market. This is also the 5th time that the ICAC Plenary Meeting is being held in India in the last 6 decades.

The event will feature sessions covering a wide range of topics, including market trends, technological advancements, and sustainable practices, offering delegates a comprehensive view of the current state and future prospects of the cotton industry.

The ICAC is a global forum that brings together cotton-producing and consuming countries, international organizations, and the private sector to discuss and address issues facing the world cotton industry. This prestigious event provides a platform for stakeholders to engage in dialogue, exchange knowledge, and collaborate on strategies to promote sustainability and growth in the cotton sector.

Key Objectives

- Facilitate discussions on global cotton market trends and challenges.
- Explore opportunities for sustainable cotton production and consumption.
- Promote international collaboration to enhance the competitiveness of the cotton sector.
- Showcase India's contributions to the global cotton industry and its commitment to sustainability.

The event will give India a unique opportunity to showcase the strength, growth, and resilience of the cotton-based textile industry in India; share case studies, success stories, and inventive steps of small and marginal farmers; highlight local initiatives for enhancing productivity, sustainability through Carbon sequestration: recent breakthroughs; pest management strategies, advancements in water management for Cotton and Textile Value chain; quality assurance and traceability; harmonizing the certification regimes, cotton by-products, herald the launch of the Indian brand of Kasturi cotton to the World, importance of price discovery mechanisms, Arbitrations for Cotton trade; fostering Entrepreneurship in support services, the impact of the digital revolution and contribution to process as well as product on farm for higher value creation.

CITI and the Ministry of Textiles express their enthusiasm for the opportunity to co-host this significant gathering, emphasizing the importance of international cooperation in addressing challenges and fostering innovation within the cotton industry.

CITI ACTIVITIES

CITI MEETS KOREAN TEXTILE DEVELOPMENT INSTITUTE TO DISCUSS FOSTERING PARTNERSHIPS AND ADVANCEMENTS



Meeting between CITI and KTDI on November 23, 2023 in CITI's Delhi Office.

Seen in the picture Mr. Jaedong Kang, Assistant Professor, RBS and Mr. Sang Gi Hong, Team Leader-International Cooperation, KTDI, Ms. Chandrima Chatterjee, Secretary General, CITI and Mr. Manoj Sharma, Joint Secretary.

On November 23, 2023, representatives of Confederation of Indian Textile Industry (CITI), Ms. Chandrima Chatterjee, Secretary General, Mr. Manoj Sharma, Joint Secretary and Korea Textile Development Institute (KTDI), Mr. Sang Gi Hong, Team Leader-International Cooperation Team and Mr. Jaedong Kang, Assistant Professor, RBS met in CITI's New Delhi office. Discussions included fostering collaboration in areas of Advanced Materials, Artificial Intelligence, emerging technologies, and technology transfer.

As a non-profit organization, KTDI contributes research, development, testing, and training facilities to the fibre industry. KTDI officials also discussed avenues of potential support from the Korean Government to fund R&D initiatives by consortium of Indian researchers. Both parties expressed keenness to continue the dialogue, emphasizing joint efforts to accelerate R&D in the Textiles and Apparel Sector.

JOINT APPEAL BY TEXTILE MILL ASSOCIATIONS OF INDIA TO THE HON'BLE UNION MINISTER OF FINANCE & CORPORATE AFFAIRS

On the 15th of December 2023 the Textile Mills Association of India of which CITI was also a part of met the Hon'ble Union Minister of Finance & Corporate Affairs, Smt. Nirmala Sitharaman and submitted a Joint Memorandum highlighting that the Indian textile industry is currently facing an unprecedented crisis due to a steep fall in cotton yarn export to the tune of 50%, a 23% drop in overall exports of cotton textiles, and 18% drop in the total textiles & clothing products during the financial year 2022-23 when compared to the previous financial year. The recession is continuing beyond 18 months due to long drawn Ukraine-Russia war and the recent Israel-Hamas war that has impacted the economy of countries like EU and US. The 11% import duty on cotton and challenges of MMF Quality Control Orders have added fuel to the situation as the country do not have a level playing field on the raw material front.

The capacity utilization of the spinning sector dropped to the tune of 50 to 70% for almost a year. Hence, most of the spinning mills, especially the SMEs, are facing severe financial stress and unable to service the debt and meet standing charges making most of the units to become SMA-1, SMA-2 and NPA accounts.

A joint appeal was made to the HMOF to advise the banks to extend the below financial support to the Indian Spinning Sector, especially the cotton spinning sector:

- Extend 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.

CITI ACTIVITIES...

CITI'S YOUNG ENTREPRENEURS' GROUP (YEG) ELECTS ITS NEW OFFICE-BEARERS FOR THE 2023-25 PERIOD IN ITS MEETING HELD ON 3RD DECEMBER 2023 IN MUMBAI.

We are pleased to inform you that Young Entrepreneurs Group (YEG) of Confederation of Indian Textile Industry (CITI) in its Meeting held on 3rd December 2023 in Mumbai elected its new Office-bearers.



Mr. Rajnish Aroraa, Chairman, YEG felicitated by Mr. Rakesh Mehra, Chairman, CITI and Mr. Ashish Saraf, Immediate Past Chairman, CITI YEG.

Mr. Rajnish Aroraa, Chairman, CITI-YEG



Mr. Rajnish Aroraa, Chairman, DICITEX Furnishings is the Chairman of CITI YEG Group. Dicitex brand is built on a solid value foundation of quality, customer focus, integrity and commitment. Dicitex professional and proactive management has ensured that the brand continues its northbound growth trajectory across the atlas. Be it unearthing new trends and tastes, analysing the changing lifestyles of consumers or taking bold decisions, the Dicitex Management is always in the thick of affairs. Dicitex started with a singular vision of becoming a globally reputed name in the Home Décor industry. In a little over 14 years, today Dicitex is among the world's Top 5 manufacturers of uber-chic furnishing fabrics and upholstery with a turnover of around 300 crores INR.

Mr. Gautam Ganeriwal, Vice Chairman, CITI YEG



Mr. Gautam Ganeriwal, Executive Director, Sitaram Spinners Pvt. Ltd. is the Vice Chairman of the CITI YEG Group. Sitaram Spinners located in Hyderabad, Telangana, is an enterprise of the MS Agarwal conglomerate. The company is in the art of yarn making with the state of the art technology backed by a team of professionals with the vision of becoming a preferred supplier of high-end quality yarn. The Company has been honing its skills to become the perfect yarn artisan, which has helped to carve a reputation in the making of Quality yarn, especially since we have been in the business of yarn making for over a decade now.

CITI ACTIVITIES...

CITI YEG meeting witnessed gracious presence of Mr. Rakesh Mehra, Chairman, CITI and other CITI Committee members who joined the meeting as an special invitee and addressed the Group.



Mr. Rakesh Mehra, Chairman, CITI felicitated by Mr. Rajjish Arora, Chairman, YEG and Mr. Ashish Saraf, Immediate Past Chairman, CITI YEG.



Interactive session with Gherzi team at CITI YEG Meeting

YEG Meeting was graced by eminent Speakers from Gherzi Textil Organisation, Mr. Navdeep Sodhi and Mr. Robert Antoshak, Partners who shared their valuable insights on the Topic “Disruptive Trends & Opportunities: Repositioning the Indian Textile Industry” followed by Q&A Session.

INTEX INDIA - THE PREMIER INTERNATIONAL TEXTILE SOURCING SHOW HELD ON 7-9 DEC 2023

Some glimpses from INTEX INDIA- The Premier International Textile Sourcing Show to be held on 7 -9 Dec 2023 where CITI was an industry partner. Ms. Chandrima Chatterjee, Secretary General, CITI, was invited as a Special guest for the opening ceremony.



Ms. Chandrima Chatterjee, Secretary General, CITI Moderating the Session 1: Fibres of Change at Intex Textile Conclave, Yashobhoomi, Delhi on 7th December 2023. Others in the picture: Mr. Ujwal Lahoti, Executive Chairman, Lahoti Overseas Ltd., Mr. Sanjay K Jain, MD, TT Ltd., , Mr. RK Vij, Advisor, Indo Rama Synthetics and Mr. Sarathy TG, Director, Operations, India, Texcom Textile Solutions

CITI ACTIVITIES...



BHARAT TEX Roadshow...In the Picture: Shri Rohit Kansal, IAS, Addl Secretary Textiles felicitated by Shri S.P. Oswal, Chairman, Vardhman Group, Shri Rakesh Mehra, Chairman, CITI, Shri Rajendra Gupta, Chairman (Emeritus), Trident Group, Shri Dinesh Oswal, Shri Kamal Oswal, Nahar Group and other Industry Stalwarts at CEO Round Table at BharatTex Roadshow at Ludhiana.



CEO Round Table in progress at BharatTex Roadshow at Ludhiana



Bharat Tex'24 Roadshow at Bhilwara chaired by Ms. Shubhra, Trade Advisor, Ministry of Textiles. Mr. Anil Kumar, Director, MoT, Dr. Siddharth Rajagopal, ED Texprocil Shri B.M. Sharma, Jt MD, RSWM, Dr. S.N. Modani, President, RTMA, Shri Dinesh Nolkha, Vice Chairman, CITI and other dignitaries shared the Dais.



Mr Rakesh Mehra, Chairman CITI received the SRTEPC Exemplary Contribution Award from HMoT during the SRTEPC export award ceremony at Mumbai



Gimatex (Mohota family) Felicitated by Dy.CM, Shri Devendra Fadnavis for their Contribution in Development of Vidarbha in Navbharat 90th Anniversary Function.



Brand TT recognised by ET Edge & Times Group as one of the Best Brands. Award received by Mr. Sanjay Jain and Mr. Hardeek Jain from TT Ltd.

CITI-CDRA REPORT

In the fiscal year 2023-24, CITI CDRA aims to cover an extensive area of approximately 2.04 lakh acres through our comprehensive extension services spanning across the states of Maharashtra, Rajasthan, and Madhya Pradesh. Our proactive extension programs have successfully engaged numerous farmers, leading to tangible benefits for thousands within these regions.

As of the current fiscal year, CITI-CDRA's extension initiatives mark the 17th year of dedicated service in Rajasthan, the 9th year in Maharashtra, and the 7th year in Madhya Pradesh. Throughout these years, our commitment to agricultural development has strengthened, fostering sustainable practices and delivering impactful results to the farming communities in these states.

• Project Coverage

State	Number of Districts	Number of Clusters	No. of Villages	Area (ha)
Maharashtra	6	18	152	20800
Rajasthan	4	14	177	40440
Madhya Pradesh	4	21	309	22319
TOTAL	14	53	638	83559



• Achievements

In Bhilwara district of Rajasthan, an average of 33 quintals to 36 quintals seed cotton yield per hectare (11.6 to 13 quintals lint/ha) is reported, which is a milestone triumph to CITI CDRA.

In Maharashtra under HDPS area, CITI CDRA is expecting to achieve a yield of 20 quintals seed cotton/hectare.



• Overview of Programs Conducted

Sr. no	State	Farmers Workshop	Farmers Trainings	Field days
1	Madhya Pradesh	5	31	44
2	Rajasthan	2	21	18
3	Maharashtra	2	18	4
TOTAL		9	70	66

Drone Training

On November 3rd, 2023, an insightful and engaging demonstration on Drone Spraying was organized by CITI CDRA in the cotton fields of Moho Gaon, Nagpur, as part of a collaborative project. The event was attended by key figures in agriculture, including Divisional Superintendent Agriculture Officer Shri Milind Shende, Deputy Director of Agriculture Shri Sudhir Mohril, CICR's Dr Manikandan, Dr Shivaji Thube.



Field Trainings



Front line Demonstrations

CITI CDRA (Cotton Development and Research Association) initiated a Mycorrhiza Demonstration in Rajasthan, covering 60 acres of Special Cotton Project area as good practices. The project aimed to assess the impact of mycorrhizal fungi on crop growth and nutrient uptake, specifically in cotton cultivation. Over the course of the project, positive results were observed, leading to increased interest from local farmers and demonstrating the potential benefits of mycorrhiza in regenerative farming practices.

In the concerted effort to manage the pink bollworm menace, the PB Knot Bandhan project was executed on a demonstration expanse of 65 acres within the cotton fields of Mauja Palasaoli



village, located in Parshioni taluka of Nagpur District. This collaborative initiative involved the active participation of the South Asia Biotechnology Centre (SABC) and CITI-CDRA.

To disseminate the knowledge and benefits of the PB Knot Bandhan project, an informative session was conducted at the Gram Panchayat Hall in Palasavali, reaching out to both the participating cotton farmers and the local community. Mr. Rajendra Thakur, the Sarpanch of Gram Panchayat, presided over the program. The session

featured a demonstration led by an expert, and distinguished speakers included Dr. Bhagirath Chaudhary, Director of SABC, Dr. Ramkrishnan, Senior Agronomist at CICR, Dr. Shivaji Thube, Entomologist at CICR, and Shri Suhash Thete from PI Foundation. These experts provided valuable insights and guidance on cotton cultivation technology to benefit the audience.

World Cotton Day Celebration



Farmers Day Celebration



Mobile Van

On December 19, 2023, CITI CDRA introduced an innovative initiative with the inauguration of a mobile van during the Krishi Mahotsav at the premises of Agriculture College Nagpur. This ground-breaking approach aims to raise awareness about Pink Bollworm management and the high-density planting system of cotton.



Kisan Mela

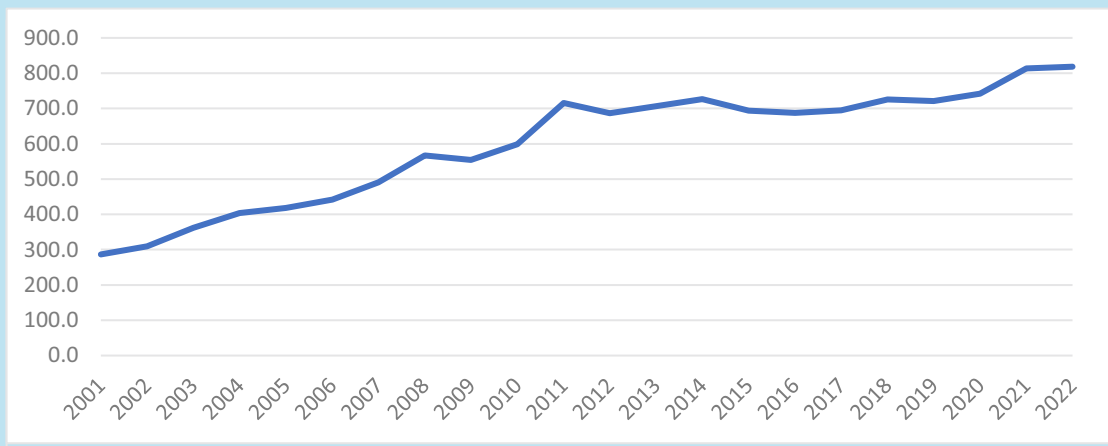
On the 25th of November, a remarkable event unfolded at Nagpur CITI CDRA Maharashtra, as farmers from collaborative projects gathered for a grand Kisan Mela and workshop on cotton within the premises of Agro Vision Kisan Mela. Distinguished speakers, including the expertise of ICAR's Dr. Ramkrishna, Dr. Babasaheb Fans, Dr. Vinita Gotmare, CIRCOT In-charge, Dr. Pandiyan, and CITI CDRA's Shri Govind Wairale, graced the occasion, sharing invaluable insights.



SWITZERLAND

With a GDP of about US\$ 818.4 Bn in 2022, Switzerland (SUI) stands as 20th largest economy in the world and is one of the world's most advanced and a highly-developed free market economy. According to the UN Nations data, Switzerland is one of the richest landlocked countries in the world. As per the estimates of the International Monetary Fund (IMF), Switzerland's nominal GDP is expected to reach about US\$ 870 billion in 2023.

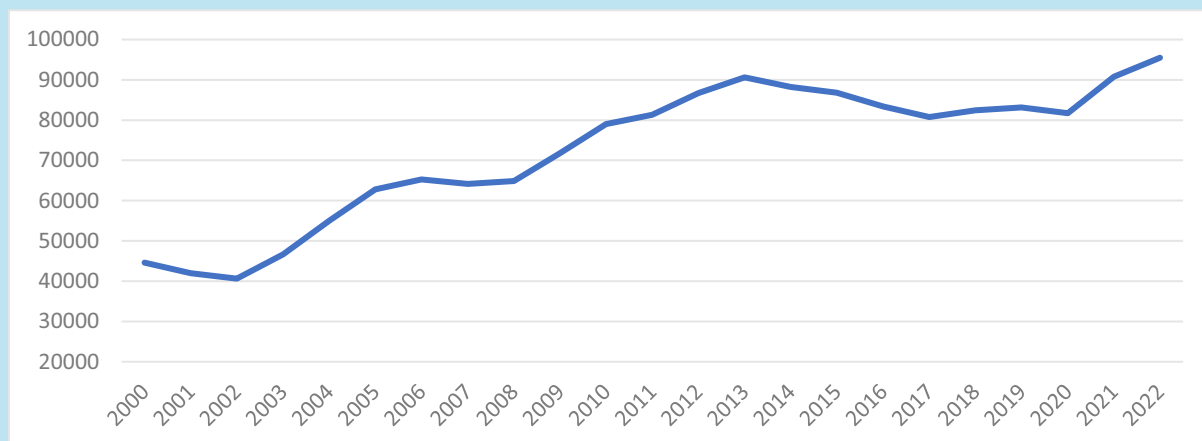
GDP(Current USD) of Switzerland (USD Bn.)



Source: World Bank and CITI Analysis

The Gross National Income of Switzerland has increased at a CAGR of about 3.5% during the last two decades and is expected to rise further at a faster rate owing to favourable economic conditions. High income makes Switzerland a favourable market for high end Textile Products.

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



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

Overview of the Global Textile & Apparel Trade of SUI

SUI is a net importer of Textile and apparel (T&A) products. During 2022, SUI exported T&A commodities worth about US\$ 4.04 bn to the world which have increased at a CAGR of about 1.8% during 2018-2022 and imported T&A commodities worth about US\$ 10.34 bn from the world which have increased at a CAGR of about 3.2% during 2018-2022.

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

Year	Exports	Imports	Trade Balance
2018	3.76	9.10	-5.34
2019	3.76	9.18	-5.42
2020	3.89	10.29	-6.40
2021	4.19	10.56	-6.37
2022	4.04	10.34	-6.30
CAGR	1.8%	3.2%	

Source: ITC Trade Map & CITI Analysis

Category-wise analysis shows that Apparel was the largest imported T&A category by Switzerland from the world and had a share of about 79% in SUI's total T&A imports from the world during 2022.

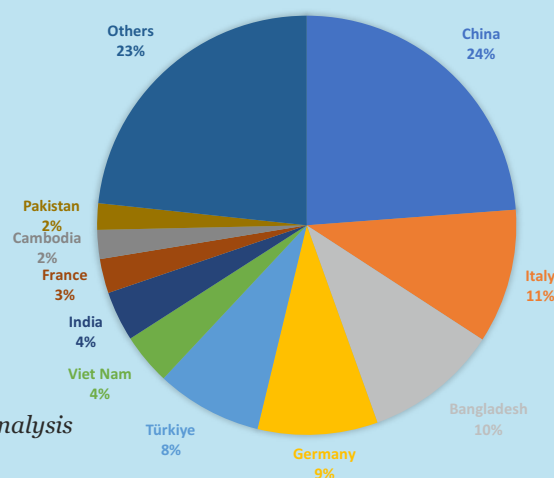
Category Wise Imports of T&A by Switzerland in 2022 (US\$ Bn)

Row Labels	2018	2019	2020	2021	2022	Share 2022
Fibre	0.05	0.05	0.05	0.06	0.06	0.6%
Filament	0.08	0.07	0.06	0.07	0.08	0.8%
Yarn	0.06	0.06	0.06	0.06	0.06	0.6%
Fabric	0.62	0.57	0.51	0.55	0.58	5.6%
Apparel	7.09	7.26	7.49	8.29	8.16	79.0%
Home Textiles	0.55	0.54	0.57	0.64	0.62	6.0%
Others	0.65	0.63	1.56	0.88	0.77	7.5%
Total	9.10	9.18	10.29	10.56	10.34	100.0%

Source: ITC Trade Map & CITI Analysis

China was the leading supplier of T&A commodities to SUI and had a share of about 24.0% in SUI's total T&A imports from the world during 2022 followed by Italy and Bangladesh with a share of about 10.4% and 10.3% respectively. The top 5 countries accounted for about 62% of SUI's total T&A imports from the World during 2022.

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



Source: ITC Trade Map & CITI Analysis

Categorical analysis shows that the top 10 T&A commodities imported by SUI constitute about 61.7% of SUI's total T&A imports from the world during 2022. Although the import of HSN 6110 has shown the maximum CAGR of about 7.9% during 2018-2022, the share of it is 12.27% compared to HSN 6204 which is the highest imported commodity with a share of 12.31% in the same time frame.

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

HS Code	Commodity	2018	2019	2020	2021	2022	CAGR	Commodity Wise Share in 2022
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers	1.17	1.22	1.17	1.24	1.27	2.1%	12.31%
6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted	0.94	1.07	1.13	1.32	1.27	7.9%	12.27%
6203	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches	0.96	1.00	1.01	1.08	1.01	1.3%	9.76%
6104	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, etc.	0.53	0.59	0.64	0.73	0.72	7.8%	6.98%
6202	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, etc.	0.50	0.54	0.52	0.62	0.59	4.0%	5.67%
6109	T-shirts, singlets and other vests, knitted or crocheted	0.45	0.36	0.39	0.44	0.47	1.4%	4.57%
6206	Women's or girls' blouses, shirts and shirt-blouses (excl. knitted or crocheted and vests)	0.35	0.32	0.29	0.29	0.27	-5.9%	2.63%
6201	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters,	0.25	0.24	0.24	0.27	0.26	1.3%	2.51%
6307	Made-up articles of textile materials, incl. dress patterns, n.e.s.	0.20	0.19	1.10	0.38	0.26	6.8%	2.50%
6302	Bedlinen, table linen, toilet linen and kitchen linen of all types of textile materials (excl.) etc.	0.23	0.22	0.23	0.25	0.26	2.7%	2.49%

Source: ITC Trade Map & CITI Analysis

Textile & Apparel Trade Between India and Switzerland

India was the 7th largest supplier of T&A commodities to Switzerland in 2022. During 2022, Switzerland imported T&A commodities worth US\$ 398.39 Mn from India which has grown at a CAGR 4.9% during 2018-2022.

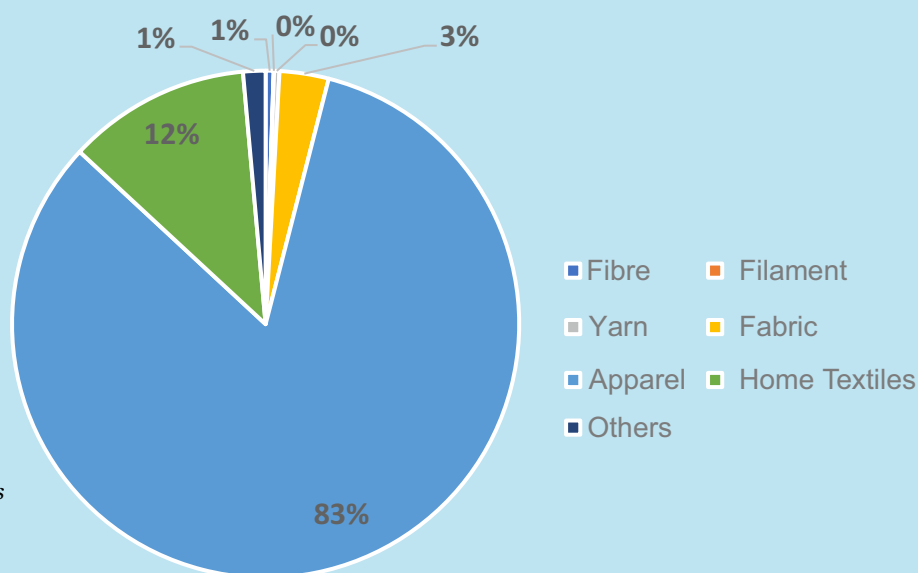
Switzerland imports of T&A from India (US\$ Mn)

Row Labels	2018	2019	2020	2021	2022	CAGR
Fibre	1.80	1.80	0.90	1.12	2.02	2.9%
Filament	0.18	0.19	0.30	0.10	0.11	-12.3%
Yarn	1.18	1.00	0.85	0.91	1.35	3.5%
Fabric	9.16	10.30	8.35	10.90	12.49	8.0%
Apparel	270.94	269.89	280.13	319.56	330.23	5.1%
Home Textiles	41.32	38.25	39.35	48.47	46.51	3.0%
Others	4.77	4.81	6.84	7.83	5.68	4.5%
Total	329.36	326.24	336.73	388.87	398.39	4.9%

Source: ITC Trade Map & CITI Analysis

Category-wise analysis shows that apparel was the largest imported T&A commodity by Switzerland from India and accounted for about 82.9% of total T&A imports by SWITZERLAND from India followed by Home-Textiles with 11.7% share.

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



Source: ITC Trade Map & CITI Analysis

The top 10 commodities imported by SUI from India accounted for about 73.9% of SUI's total T&A imports from India during 2022. HSN 6204 was the largest imported T&A category by SUI from India which accounted for about 24.1% of SUI's total T&A imports from India.

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

HS Code	Commodity	2018	2019	2020	2021	2022	CAGR	Commodity Wise Share in 2022
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers,	53.84	59.93	73.25	87.55	96.00	15.6%	24.1%
6206	Women's or girls' blouses, shirts and shirt-blouses (excl. knitted or crocheted and vests)	40.90	38.75	39.98	44.25	42.83	1.2%	10.8%
6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted (excl.)	29.23	32.58	28.12	32.57	34.46	4.2%	8.7%
6104	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers,	23.20	24.44	23.02	27.77	27.58	4.4%	6.9%
6109	T-shirts, singlets and other vests, knitted or crocheted	25.17	21.31	22.65	24.43	25.65	0.5%	6.4%
6203	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches	16.44	13.94	18.49	18.29	15.20	-1.9%	3.8%
6302	Bedlinen, table linen, toilet linen and kitchen linen of all types of textile materials (excl.)	15.24	12.95	11.65	13.00	13.94	-2.2%	3.5%
6108	Women's or girls' slips, petticoats, briefs, panties, nightdresses, pyjamas, negligés, bathrobes,	12.19	9.72	9.11	9.45	13.35	2.3%	3.4%
5702	Carpets and other textile floor coverings, woven, not tufted or flocked, whether or not made	9.49	8.78	11.16	14.30	12.65	7.5%	3.2%
6205	Men's or boys' shirts (excl. knitted or crocheted, nightshirts, singlets and other vests)	11.68	12.07	10.61	12.39	12.63	2.0%	3.2%

Source: ITC Trade Map & CITI Analysis



Way Forward:

While Switzerland is known for its latest and most advanced tools and techniques in the Textile Industry, India, on the other hand, is well known for its Textile Products ranging from Fibre to Fashion and hence proving that the countries complement needs of each other in Textile & Apparel space.

Textiles and clothing are amongst the most traded goods in bilateral trade. In order to maintain and expand these relations and to tap the full potential, a comprehensive Trade and Economic Partnership Agreement (TEPA) is of utmost importance. Despite current low T&A trade, the Trade and Economic Partnership Agreement (TEPA) will foster deeper collaboration, knowledge exchange, and expanded market access.

In both countries, the textile and apparel industry are of great importance for the national economy. The industries are embedded in global value chains and depend on good multilateral and bilateral relations. Switzerland offers itself as a buyer for raw materials and intermediate products, which can then be transformed in Switzerland and presented on the Indian or the European market as high-quality and sustainable end products while India imports Technology and Machines from Switzerland.

Keeping the best interests of their respective nations and its industries, CITI and Swiss Textiles which are the national associations of the textile and apparel industry in India and Switzerland. Together they represent the companies in this diversified sector and are committed to improve the market conditions for the benefit of their member companies signed an MoU on the 23rd of November 2023, which is aimed at promoting bilateral trade and investment in the textile & apparel sector by actively cooperating to:

- Eliminate trade barriers to facilitate exports and imports of textile & apparel products.
- Offer information on trade policies of their respective countries.
- Boost Foreign Direct Investment in the textile & apparel industries.



Advertisement Tariff for Textile Times

If you are an Indian firm, please tick (✓) against one of the following:

	One Issue	Three issue	Six Issues
Cover Gate Fold* (Double Spread)	Rs. 40,000 <input type="checkbox"/>	Rs. 1,10,000 <input type="checkbox"/>	Rs. 2,10,000 <input type="checkbox"/>
Back Cover*	Rs. 25,000 <input type="checkbox"/>	Rs. 70,000 <input type="checkbox"/>	Rs. 1,25,000 <input type="checkbox"/>
Inside Covers*	Rs. 15,000 <input type="checkbox"/>	Rs. 40,000 <input type="checkbox"/>	Rs. 75,000 <input type="checkbox"/>
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If you are a foreign firm, please tick (✓) against one of the following:

	One Issue	Three Issues	Six Issues
Cover Gate Fold* (Double Spread)	US\$ 1000 <input type="checkbox"/>	US\$ 2750 <input type="checkbox"/>	US\$ 5250 <input type="checkbox"/>
Back Cover*	US\$ 550 <input type="checkbox"/>	US\$ 1500 <input type="checkbox"/>	US\$ 2700 <input type="checkbox"/>
Inside Covers*	US\$ 300 <input type="checkbox"/>	US\$ 800 <input type="checkbox"/>	US\$ 1500 <input type="checkbox"/>
Full Page (Colour)	US\$ 250 <input type="checkbox"/>	US\$ 700 <input type="checkbox"/>	US\$ 1300 <input type="checkbox"/>

* Prime positions are mostly booked for term contracts, please check availability prior to booking

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



- During Nov'23, Indian Textiles Exports registered a growth of **1.63%** over the previous year while Apparel Exports registered a degrowth of **-14.92%** during the same time period. However, as compared to Nov'21, exports of both Textile and Apparel have declined by **-27.43%** and **-4.75%** respectively.
- Cumulative Exports of Textiles and Apparel during Nov'23 have registered a degrowth of **-5.91%** over Nov'22 while it has declined by about **-19.53%** as compared to Nov'21.
- During Apr-Nov'23, Indian Textiles Exports registered a degrowth of **-0.19%** over the previous year while Apparel Exports registered a degrowth of **-14.62%** during the same time period. Similarly, as compared to Apr-Nov'21 the exports of Textile and Apparel have declined by **-20.46%** and **-8.39%** respectively.
- Cumulative Exports of Textiles and Apparel during Apr-Nov'23 have registered a degrowth of **-6.58%** as compared to Apr- Nov'22 while the same has declined by about **-15.97%** as compared to Apr-Nov'21.

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

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

Export category	Nov-21	Nov-22	Nov-23	% Change Nov 23/ Nov 22	% Change (Nov 23/ Nov 21)	Apr- Nov'21	Apr- Nov'22	Apr- Nov'23	% Change (Apr-Nov23/ Apr-Nov22)	% Change (Apr-Nov23/ Apr-Nov21)
Cotton Yarn/Fabs./made-ups, Handloom Products etc.	1,227.83	803.97	854.88	6.33%	-30.37%	9,849.14	7,313.48	7,731.52	5.72%	-21.50%
Man-made Yarn/Fabs./made-ups etc.	428.36	354.89	328.88	-7.33%	-23.22%	3,580.36	3,291.85	3,053.16	-7.25%	-14.72%
Jute Mfg. including Floor Covering	42.63	32.75	24.87	-24.06%	-41.66%	315.39	302.65	233.71	-22.78%	-25.90%
Carpet	148.63	115.06	119.92	4.22%	-19.32%	1,193.56	932.77	914.98	-1.91%	-23.34%
Handicrafts excl. handmade carpet	159.71	126.65	128.13	1.17%	-19.77%	1,382.58	1,165.51	1,048.81	-10.01%	-24.14%
Sub-Total Textiles	2,007.16	1,433.32	1,456.68	1.63%	-27.43%	16,321.03	13,006.26	12,982.18	-0.19%	-20.46%
Apparel	1,072.17	1,200.28	1,021.19	-14.92%	-4.75%	9,656.47	10,360.63	8,846.42	-14.62%	-8.39%
Textile and Clothing	3,079.33	2,633.60	2,477.87	-5.91%	-19.53%	25,977.50	23,366.89	21,828.60	-6.58%	-15.97%
All Commodity	30,035.74	34,887.10	33,895.82	-2.84%	12.85%	2,63,574.68	298,214.54	2,78,796.1	-6.51%	5.77%
% of T&C in Total Exports	10.25%	7.55%	7.31%			9.86%	7.84%	7.83%		

Source: Press Information Bureau

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

Imports category	Nov-21	Nov-22	Nov-23	% Change Nov 23/ Nov 22	% Change (Nov 23/ Nov 21)	Apr- Nov'21	Apr- Nov'22	Apr- Nov'23	% Change (Apr-Nov23/ Apr-Nov22)	% Change (Apr-Nov23/ Apr-Nov21)
Cotton Raw & Waste	26.17	48.88	30.6	86.78%	16.93%	360.91	1,302.45	469.28	-63.97%	30.03%
Textile yarn fabric, made-ups	181.84	209.42	193.62	15.17%	6.48%	1,277.19	1,832.01	1,546.74	-15.57%	21.10%

Source: Press Information Bureau

CITI'S ANALYSIS OF QUICK ESTIMATES OF IIP FOR TEXTILE AND CLOTHING SECTOR (T&C) FOR THE MONTH OF OCTOBER



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

Sector	Weights	Index			Cumulative Index		
		Oct-22	Oct-23	% Change	Apr -Oct 22	Apr-Oct 23	% Change
General	100	129.5	144.7	11.7	134.3	143.5	6.9
Manufacture of textiles	3.2913	102.3	109	6.5	107.4	107.6	0.2
Manufacture of wearing apparel	1.3225	103.7	98.5	-5	130	103.8	-20.2

Source: Press Information Bureau

- For the month of October 23, the Quick Estimates of Index of Industrial Production (IIP) with base 2011-12 stands at **144.7** which is about **11.7%** higher than IIP of October 22.
- IIP for manufacture of textiles was up by (+) **6.5** percent in October 23 as compared to October 22 and Wearing Apparel was down by (-) **5** percent over the same period.

Textile sector Skill Council



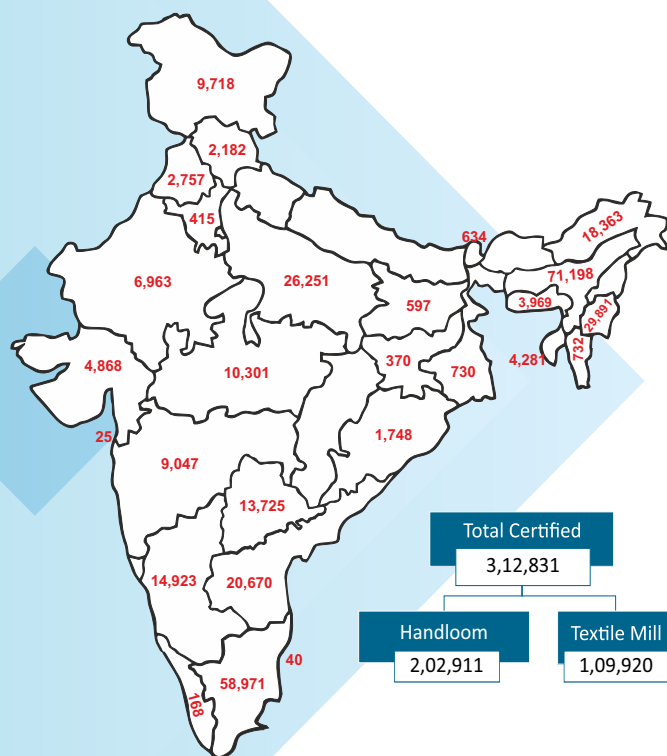
Who we are :-

- 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