

TEXTILE

CITI

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TIMES

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A large graphic consisting of three thick, curved arrows in shades of green and yellow, arranged in a circular pattern. The arrows point clockwise, creating a continuous loop. In the center of this loop, the text 'CIRCULAR TEXTILE ECONOMY' is written in a bold, white, sans-serif font with a dark green outline.

**CIRCULAR
TEXTILE
ECONOMY**



2nd GLOBAL TEXTILES CONCLAVE 2021

(Wednesday, 24th & Thursday, 25th February 2021) (Virtual Event)

“THE INDIA FACTOR: TRANSFORMING GLOBAL TEXTILES & APPARELS IN 2021-30”

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Keynote Address by



Smt. Smriti Zubin Irani

Hon'ble Union Minister of Textiles and Women & Child Development

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Friends, at the outset, I wish everyone a very happy and prosperous new year and season's greetings.

The year 2020 and the first two or three quarters of 2021 would go down in the history of economic disruption owing to COVID-19 pandemic across the globe. Even the most developed countries like USA, UK were the worst affected while China and India, the most populous countries could fight against the deadly virus and manage with limited ill effects. It is glad to note that several countries including India have ultimately developed the COVID vaccine and successfully started the vaccination process. In the meanwhile, the COVID cases are also dropping significantly and I am sure the population of the herd immunity too is on the increasing trend. I hope our country would be in a position to complete the vaccination process in the coming months that would bring normal life, if not in the second quarter, at least in the third quarter of 2021.

Textiles and Clothing products being one of the three important basic needs of the human beings, the market could recover on a fast track immediately after relaxing the COVID restrictions and the Indian textile industry is bouncing back to the pre-COVID situation and currently there is a spurt in demand across the value chain especially for yarn as the inventory had dried up during the lockdown period. I highly appreciate and thank the industry leaders across the value chain especially the Presidents and Chairmen of all National level and regional level textile Associations and Export Promotion Councils for standing united and extending their whole-hearted support to mitigate the supply demand mismatch issue.

NCTC has been advising all the manufacturing segments across the value chain to avoid panic buying, building inventory, etc., to bring the stability in the raw material and yarn prices. India is having the highest stock-to-use ratio of cotton closing stock; we have abundant home-grown cotton and the prices are lower than the international prices. Hence, we need not be panic in the cotton value chain. Viscose Staple fibre anti-dumping duty needs to be removed to address the VSF value chain price issue. The market has already started reaching the saturation level and I am sure the prices will stabilize within a couple of weeks and I therefore urge all the stakeholders to remain calm and manage the supply-demand mismatch position prudently. This is the time for all the stakeholders to remain united to have a win-win strategy. At the same time, the yarn manufacturers and fabric manufacturers should ensure uninterrupted supply to the end customers and exporters also need to take care while entering into long term contracts.

I thank our Hon'ble Union Textile Minister for responding to the representations made by NCTC and CITI and addressing the raw material related issues including the recommendation of removing anti-dumping duty on Viscose Staple Fibre, directing CCI to extend free period irrespective of volume of purchase upto 90 days with nominal charges. I am sure this will greatly benefit the MSME segment of the value chain. I also thank the Hon'ble Union Textile Minister and CCI for continuing the sales without interruption for the first time in the history of CCI cotton trading activities.

I thank the Hon'ble Prime Minister and Hon'ble Union Textile Minister for announcing the Production Linked Incentive Scheme and allocating Rs.10,683 crores for textile industry, announcing Mega Integrated Textile Region and Apparel Parks (MITRA) and also actively considering the National Textile Fund that would provide a permanent solution for the capital cost of the Indian textiles and clothing industry. I am sure with all these interventions, India would be able to create at least 40 to 50 global champions in the short run and more in the long run. I urge all the entrepreneurs of textiles and clothing units to focus on high value-added products especially in the manmade fibre segment, the future engine of growth.



Friends, recently, a Parliamentary Standing Committee on Labour chaired by Shri Bhartruhari Mahtab, including Hon'ble Members of Parliament, Shri.K.Subbarayan (Tiruppur) and Shri.M.Shanmugam (Rajya Sabha), Shri Sanjay Sharan, Joint Secretary, Shri J. Karan Singh, Trade Advisor, Ms. Roop Rashi, Textile Commissioner, officials from the Ministry of Textiles and officials from Government of Tamil Nadu visited Coimbatore and Tiruppur on 19th January 2021 to study the potential for the growth of MMF textile industry in Tamil Nadu, especially Coimbatore and Tiruppur, the largest textile clusters in the country.

The Committee had a detailed interaction with the members of the National Committee on Textiles & Clothing (NCTC) comprising CITI, AEPC, TEXPROCIL, CMAI, SRTEPC, PDEXCIL, ITTA and TEA. We briefed them that Tamil Nadu is the largest textile manufacturing State accounting 1/3rd of the textile business. It has an excellent infrastructure and eco-system for innovation and manufacturing high value-added MMF products and holds potential for attracting new investments including FDI / JVs and creating new jobs. We also briefed them that our industry can grab the opportunities thrown by China especially in the post-COVID scenario, if a conducive policy is announced for man-made fibre textiles and clothing products by facilitating a level playing field in the globalized environment.

The Ministry of Textiles has formed a Committee to consider launching of Global Cotton Contract on MCX with CITI Chairman as Chairperson and industry stakeholders as members of the Committee, including cotton and farmers' associations. The Committee had its first stakeholders meeting and discussed at length the pros and cons of having global cotton contract on MCX. We are planning to hold two or three more such stakeholders' consultative meetings to include everyone's viewpoint before submitting the report to the Government in two months.

CITI also attended the cotton stakeholders meeting regarding Price Policy for Kharif Crops 2021-22 Season organised by Commission for Agricultural Costs & Prices (CACPC) and suggested to introduce Direct Benefit Transfer (DBT) system for cotton farmers, increase Minimum Support Price (MSP) for cotton only on a gradual and planned manner, introduce MSP or special incentive for organic cotton, speciality cotton and coloured cotton for enhancing its production and exports, implement TMC II at the earliest for productivity enhancement, adopt measures to reduce cost of cotton production, enhance cotton picking mechanically, etc., which was well received by the cotton stakeholders.

I am also pleased to inform you that CITI is organising the 2nd edition of its Global Textiles Conclave (GTC2021) during 24th-25th February 2021 through virtual platform. International Textile Manufacturers Federation (ITMF) and International Apparel Federation (IAF) are the Co-Partners and Gherzi Textil Organisation is the Knowledge Partner. The theme of the conclave is "The India Factor: Transforming Global Textiles & Apparels in 2021-30". We are inviting the Hon'ble Prime Minister to inaugurate the event and the Hon'ble Union Minister for Textiles has kindly agreed to deliver the keynote address in the Inaugural Session. Majority of our speakers and panelists are from across the globe and will deliberate extensively on the new challenges and opportunities being thrown by the COVID-19 pandemic to the world. It is a perfect opportunity for meeting global textile & apparel buyers, supply chain partners, budding start-ups, policy makers and thought leaders. There is also an excellent brand promotion and networking opportunity through Sponsorship besides the scope for B2B Meetings and Networking Booths. I request everyone to not miss this wonderful opportunity and register themselves immediately. I look forward to everyone's support in making CITI GTC2021 a grand success.

T. Rajkumar

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At the outset, I wish you all a very Happy and Prosperous New Year 2021. The year 2020 has been very disturbing not just for the mankind but also from the economic point of view as well with Covid-19 affecting the economy and industrial activities worldwide. However, under the dynamic leadership of the Hon'ble Prime Minister, Narendra Modi Ji, India has done exceptionally well in dealing with the Covid-19 pandemic as compared to other developed and developing economies of the world.

With the rollout of the vaccine program not only in India but also in many parts of the world, we are moving ahead with new vigour with the lessons we learned from the Covid-19 pandemic. One of the most important lessons we learned from the present crisis is to be sustainable and our textile industry should be all the more cautious on this account as the activities of the entire textile value chain has a huge implication on the environment. Textile & Apparel (T&A) Industry is well known for its higher resource utilization and environmental impact. The way we design, produce, process and use clothes has to be reoriented for becoming environmentally sustainable.

The present edition of the Textile Times is focussed on Circular Textile Economy which is a subject of great importance in the international textile trade. A linear economy is one where we produce something, use it and then dump it. A circular economy on the other hand, is where we produce something in such a way it facilitates reuse. The emphasis is on resource conservation through reuse and adding value to the new product as well.

A study done by Ellen MacArthur Foundation on “A New Textiles Economy: Redesigning Fashion's Future” in 2017 pointed out that “the textiles system operates in an almost completely linear way: large amounts of non-renewable resources are extracted to produce clothes that are often used for only a short time, after which the materials are mostly sent to the landfill or incinerated. More than USD 500 billion of value is lost every year due to clothing underutilisation and the lack of recycling. Furthermore, this take-make-dispose model has numerous negative environmental and societal impacts. For instance, total greenhouse gas emissions from textiles production, at 1.2 billion tonnes annually, are more than those of all international flights and maritime shipping combined”.

It is not only the production and the profit which matters rather the social, economic and environmental impacts of the business activities on people and the planet and hence concepts like Sustainability, Recycling, Traceability, Blockchain, etc. become more important in the present time.

Today across the globe, we are witnessing many brands like Evrlane, Stella McCartney, Adidas, Reebok, etc. experimenting with the textile innovations that aims to push the industry towards a greener future. The circular economy model has recently gained a lot of attention worldwide from scientists, business people and authorities. Presently, several start-ups have come up in this field experimenting with different natural ingredients and formulas to create textiles ready for the market. Several brands, nowadays, are partnering with such start-ups to move out of traditional material usage.

Adopting Circular Textile Economy will not only reduce dependency on the raw materials but also reduce the environmental damage caused by resource extraction, thus creating eco-friendly industries and jobs which will help brands in getting an eco-friendly image.



By 2030, the global population is expected to reach about 9 billion and nature will struggle to meet human demands like never before. The main aim of the circular textile economy is to ensure that clothes in future are made from safe and renewable materials and adopting business models in which products, equipment and infrastructure are in use for a longer period, thus improving the productivity of these resources. There is a greater need to evolve the present textile & apparel industry to a future where every material is used and reused safely, where ecosystems are protected to benefit not only the people but the planet as well.

However, adopting a circular economy is not an easy task. There are a lot of barriers like financial issues, lack of government support and effective legislation, lack of information, administrative burden, lack of technical skills, lack of support from demand and supply network which are preventing companies to adapt to this new business model and go on with their existing infrastructure and techniques. Most importantly, even among those who were supportive of circular textile economy are unwilling to pay more for it.

In India, the circular economy is alive and kicking in the cotton yarn industry which is India's jewel of textile sector and uses about five million tonnes of cotton domestically every year. In this process, there are marked containers next to each machine to hold the waste generated. Spinning mills are perfectly free to sell or dump their waste if it is done so safely. But mills closely monitor how much they produce every day and every hour and try to get the best prices for that waste.

Where companies need to focus on collaboration and innovation, the Government needs to educate people about the benefits of the circular economy, especially in the textile sector. It is advisable to promote it through incentives, tax holidays or as part of their CSR initiatives. In a nutshell, circular economy will help in carbon footprint reduction, clean air preservation, reduce energy consumption, help water & woodland conservation, benefit revenue stream for recycling agencies, creating jobs, promoting small business, encouraging recycled product development and providing affordable clothing opportunity to all.

I am sure with focussed research and development, innovation, commitment and collaboration of all the stakeholders in the textile value chain, Indian textile industry will strive towards the circular economy in the near future.



ACCELERATING TEXTILE-TO-TEXTILE CIRCULAR SUPPLY SYSTEMS



Ms. Karla Magruder

President, Accelerating Circularity and CEO, Fabrikology

Circularity will be remembered as the most important concept for the 2020s. Governments, the private sector, nonprofits and individuals are all waving the circularity flag as a movement that can save us from the current structure that is destroying not just our environment but also our communities. Can it be the transformative cure to the textile industry's sustainability problems?

The textiles sector, according to Fiber Year 2020, produced ~110 million tons of textile fibers with more than half of that going to apparel. Research – including that of Accelerating Circularity, a nonprofit I founded – shows that the environment is being inundated with spent textiles from our current lifestyle. According to 2018 EPA figures, 17 million tons of textile waste was generated, with 14.5 million tons going to landfill and incineration in the United States. Of that, 13 million

tons was clothing. Accelerating Circularity found 5.2 million tons of Post-Consumer spent textiles (table 1) and 90,000 tons Post-Industrial cutting waste, (table 2) going to landfill and incineration in our research area of the US East Coast. To provide an idea of the scale of the problem: 13 million tons of textile waste generated in the US is more than 1,000 times heavier than the Eiffel Tower, while the 5.3 million tons on only the east coast is 500 times as heavy as the Eiffel Tour. Another way to look our industry problem is through the lens of GHG emissions. According to research by the Ellen MacArthur Foundation global textile industry emissions are 1.2 billion tonnes of CO₂ equivalent per-year, close to the level of emissions from the automobile industry.

Accelerating Circularity focuses on spent textiles for textile-to-textile circular systems. When looking at the

hierarchy of spent textiles from both an environmental and economic perspective, however, we believe that materials should flow from domestic reuse/resale → repair to international reuse/resale → recycling → wipers and shoddy.

So, how does the textile industry find solutions that meet the problems of spent textiles for textile-to-textile recycling at the commensurate scale?

1. Agree on terminology. We have to speak the same language if we are going to make progress. Accelerating Circularity's Research & Mapping Report contains important definitions we are using. We plan to update this regularly in collaboration with other groups working in the sector. Circularity, recycling and many other terms are being used differently by different groups. For example, "recycler" is used to describe both companies that take spent textiles and sort them for reuse into wipers and shoddy and those doing textile-to-textile recycling. Using the same term to describe these two different businesses is confusing. It's important that we know which type of business we are talking about when we speak of recyclers. This precision with language should include the terminology we chose for materials to be used in the circular textile market. It is conventionally called textiles waste. We intentionally use the term "spent textiles" instead. If we consider something to be waste it will be treated as such.
2. Gather reliable data. Accurate information on volumes, fiber contents, trims, chemicals and the locations of spent textiles helps us begin to understand the potential for moving the materials into a circular economy. Each data point provides information that can be used by those who have the capabilities to use the materials based on these parameters.
3. Share data widely. For spent textiles to become the raw material for circular supply systems, the market will need access to this information.
 - a. Collectors/sorters/preprocessors need the information to enable them to understand if they have the required capabilities and if there is an ROI on collecting/sorting/preprocessing available materials for this sector.
 - b. Recyclers need to understand if the appropriate feedstocks are available for their recycling technologies and where it can be sourced.
4. Pilot at scale. The traditional supply chain of fiber producers, yarn spinners and product manufacturers must work with one another to determine if the quality, logistics and economics will support replacing virgin with recycled materials.



5. Require recycled materials in products. Brands and retailers must follow through with their commitment to using recycled materials at commercial volumes.

All of the actions described above are required to make headway. Circular systems are not fully in place or perfect, but commercial circular products exist. With information on material availability linked to supply chain capabilities circular systems will begin to scale. It's a matter of doing the work to understand what is possible and then implementing those processes. We cannot wait for perfection. With 6000 tons of apparel being imported into the US annually and the volume of spent textiles going into landfill and incineration also on the rise, it's the time to act.

While it's fantastic to see the vast amount of work going into the development of circular supply systems, we must understand that circularity will support the industry's sustainable performance only if reuse and resale grows at the rate estimated by industry leaders. In the ThreadUp's 2020 report estimates that resale is expected to grow 5X over the next 5 years, while retail is projected to shrink. When we look at recycling, we have data that shows that some textile-to-textile recycling systems can significantly lower our GHG emissions. However, those recycled materials will still need to be knit or woven, dyed and made into products. This means new emissions and reminds us that no system has a perfect environmental profile. In order to make a positive impact toward sustainability, we must make fewer new garments.

We also know that the textile industry continues to grow. Global population is expanding, and we still look to GDP growth as a measure of success. Covid-19 has unveiled the problems of over production, inequality in the power dynamics of the supply chain and the fragility of the entire system when disrupted. Sustainability is often described as balancing our social, environmental and economic positions. This year taught us that we are anything but balanced. Our industry's focus has been squarely on economics.

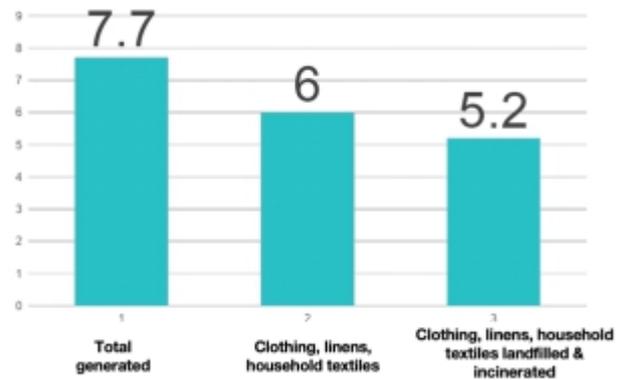
For circularity to transform the textile industry it will need an entirely new vision, including new business models that truly takes into account social, environmental and economic activities. Circularity is an important concept not because it will provide new revenue models or is an easy drop-in replacement for linear supply chains. It's important because it will lower GHG emissions verses current business models. Without a drop in GHG emissions, we will surpass levels for a safe environment. Our industry needs to take action to become more circular. Three important initiatives offer guidance along the path:

- Fashion Charter for Climate Action is guided by its mission to drive the fashion industry to net-zero Greenhouse Gas emissions no later than 2050 in line with keeping global warming below 1.5 degrees. It also includes a target of 30% GHG emission reductions by 2030 and a commitment to analyze and set a decarbonization pathway for the fashion

industry drawing on methodologies from the Science-Based Targets Initiative.

- Textile Exchange's 2030 Strategy: Climate + has a goal of 45% reduced CO2 emission from textile fiber and material production by 2030.
- The Fashion Pact: 60 signatories have committed the implementation of Science Based Target for Climate to achieve net-zero carbon impact by 2050.

USA East Coast Spent Post-Consumer Textiles (millions of tons)



USA East Coast Spent Post-Industrial Textiles (thousands of tons)

NAICS Code	Tons of Spent Textile Materials to Landfill
3132 + 3133 Fabric Mills, Finishing, and Coating	39,500
3141 Textile Furnishing Mills (Curtains and Linens)	14,750
3149 Other Textile Product Mills (Textile bags and Canvas Mills)	31,250
3152 Cut and Sew Apparel Manufacturing	4,500
TOTALS	90,000



THE PATH TO SUSTAINABILITY



Ms. Mridula Ramesh
Founder, Sundaram Climate Institute

Sustainability.

What does it mean?

No, really. *What does it mean?*

The key to sustainability – what?

Relevantly for you and me, many consumers are not what it means. They just know they want it.

Between 2016-2019, the number of internet searches for 'sustainable fashion' grew threefold. KPMG, one of the 'Big 4' global accounting firms, together with Fashion Summit, surveyed over a five thousand people in five of the world's largest cities. They found that more than 70 per cent of respondents below 35 years of age were supportive of sustainable fashion. When people were probed on what sustainability signified to

them, there was a little more waffling, with many saying a sustainable garment was a high quality, durable item, others saying it was one made by following ethical labour practises, while still others emphasized a garment made in a pollution-free process that does not use harmful chemicals, or one that is packaged in recyclable packaging. Water-use, so critical in maintaining a clean environment, was not even called out separately.

Most importantly, even among those were supportive of sustainable fashion, many were unwilling to pay more for it. Only about one in seven people surveyed said they were willing to pay more for sustainable fashion products, and of those few, most were willing to pay less than 25 per cent more.

That's a problem.

It costs more to make a high quality, durable one than a thin, flimsy one.

It costs more to pay employees a fair wage than not.

It costs more to treat water, waste and air in a non-polluting way than not. For instance, one of the complaints of the industry is the uneven treatment standards imposed on them. To go for zero-liquid-discharge, costs several rupees per metres of fabric more, than doing far more basic treatment and releasing the effluent into the nearest stream. The problem is larger, more organized players in some parts of the country have to incur this cost (in an industry where margins are less than a few rupees per meter), while companies in other parts of the country, or smaller, more informal outfits go for less complete, but cheaper treatment.

Which means, making sustainable fashion, or sustainable textiles economically realistic is a matter of payment and communication. We need to communicate to our customers and buyers that, like in life, you get what you pay for.

The key to sustainability – how?

Which brings us to where can sustainability be built or broken in a supply chain?

Let us start with the fibre. And for now, let us stick with a T shirt.

We can make T shirt from cotton, or from polyester, or what ever other fibre one wants.

Enter the circular economy.

For a moment, consider a wild garden, without human intervention. Plants grow. Leaves fall to the ground, rot or get mixed into the soil by whatever animal is poking around. The fallen leaves (and later the dead plants) enrich the soil and reduce the moisture leaving it. What a human gardener would remove as waste serves as fertilizer for the next cycle. This is the natural circular economy in operation.

The circular economy is alive and kicking in India's cotton yarn industry, which uses about five million tonnes of cotton domestically every year. When you walk through a cotton spinning mill, you will see clearly-marked containers next to each machine to hold the waste generated in that process. In cotton spinning, nearly a quarter or more of the cotton becomes unusable waste. An entire industry, called open-end spinning, has sprung up, employing tens of thousands of people in effectively using this 'waste'. This industry did not spring up because of regulation. Spinning mills are perfectly free to sell or dump their

waste if it is done so safely. But mills closely monitor how much they produce every day and every hour and try to get the best prices for that waste. They do so because this 'waste' is an important part of their bottom line. There is a ready market for the waste – consisting of brokers, open-end mills and export agents. Prices are transparent. The open-end industry that uses the waste has established machinery manufacturers, maintenance staff, supplies and end markets.

As margins have begun to fall in downstream industries like garmenting, they, too, have gone 'circular'. Making garments generates a tremendous amount of waste in the form of fabric bits that come from cutting sleeves or flaps from a bolt of fabric. In the past few years, many units have come up reprocessing this waste into fibre. Hundreds of tonnes of small 'waste' bits of fabric are segregated, sold, ground and made into yarns every day. Because of the segregation of waste by colour, the products made from these recycled fibres save significant amounts of water as they eliminate the need to dye the product again.

These open-end spinners have also begun to produce polyester yarn from used plastic bottles. Annually, India uses about 850 thousand tonnes of Polyethylene Terephthalate – three-quarters of this goes into making PET bottles and jars. A two-litre PET bottle weighs about 42 grams, which means we use roughly several billion bottles each year – a mind-boggling statistic. Plastic is cheap, lightweight, waterproof and mouldable, and has therefore become ubiquitous. Globally, most plastic packaging is not reused. Indeed, 95 per cent of plastic packaging is lost after the first use. Nearly a third is not collected and enters natural ecosystems. Plastics can remain in the ocean for hundreds of years in their original form and even longer as small particles, which means that the amount of plastic in the ocean cumulates over time. Marine life is damaged by eating the plastic or by the harmful additives in the plastic. Humans are then harmed when they consume the fish that ate the harmful plastic. If we don't change our ways, there may be more plastic in the ocean than fish by 2050.

In India, we are fairly good at recycling – we collect about 70 per cent of our bottles – even though we are not very efficient at it. This is because we don't segregate at source – in our households, restaurants, aircrafts or public events. Instead, we mostly get our rag-pickers to separate the waste for us – this is much less efficient as they must plod through mounds of rotting waste to get at the bottles. The collected bottles are then shipped to recycling plants, where the bottles are first cleaned then shredded and ground to flakes. The flakes are then washed, sorted and dried. The



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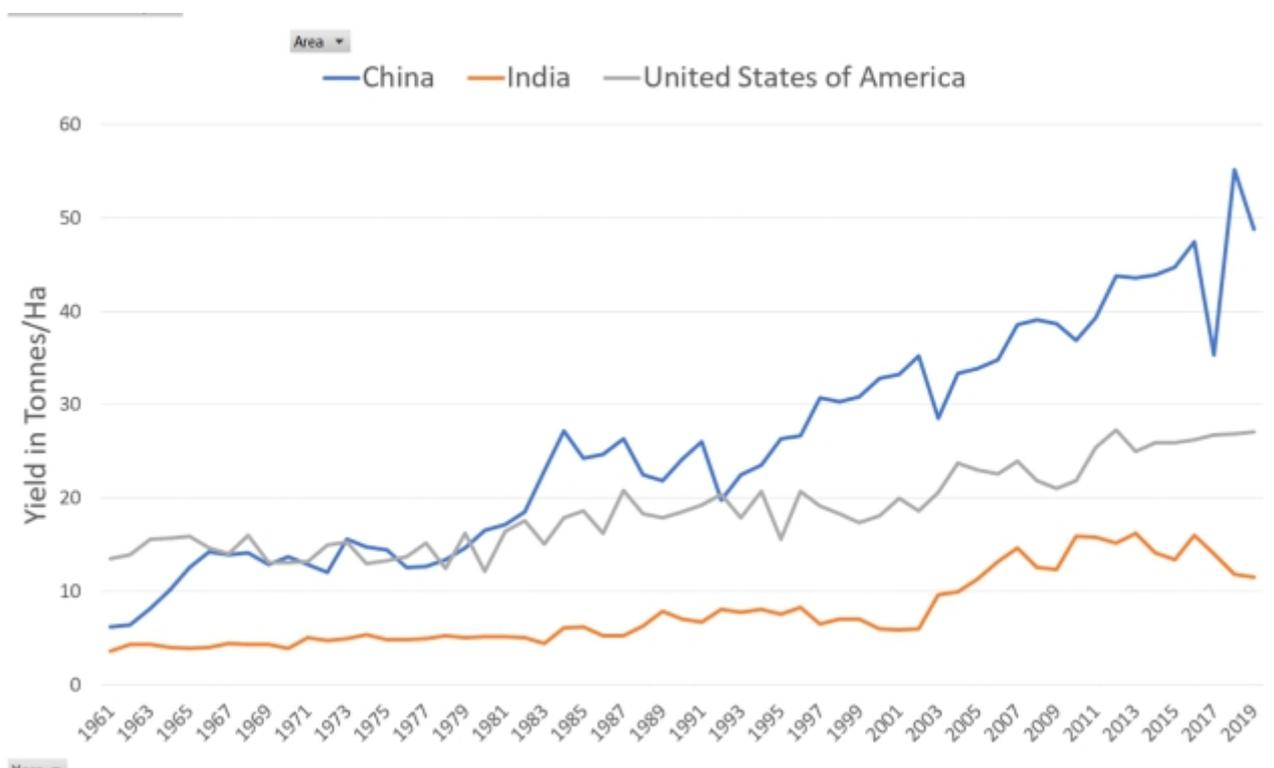


For any further information / query regarding the mega event, kindly contact Dr. S. Sunanda, Secretary General at M: +91-8800095639, E:sg@citiindia.org Mr. Manoj Sharma, Deputy Secretary at M: +91-9013386941, E: manoj@citiindia.org.

dried flakes pass through an electrostatic separator, which uses magnetic fields to separate PET flakes from metal and other contaminants. The cleaned flakes are then used to produce fibre.

The good news comes here. The capacity for recycling these bottles is growing by leaps and bounds – one

kilogramme of cotton produced. China embeds about less than a quarter of that – about 2 litres of virtual water in every kg of cotton it produces. Between 1960 and today, China's yields have skyrocketed while India's had plateaued, and, as per FAO data, even fallen. That's not sustainable.



recycler said that the demand for the 'eco-yarn' produced using this process is so high that there were not enough bottles collected to feed the demand! The 'eco-yarn' or the yarn produced from recycled PET bottle waste is about 15 per cent cheaper and is suitable for open-end spinning. These figures are from when I wrote in 2017 – in all likelihood, they are cheaper now.

Clearly a T-shirt made from Open-end yarn made from shredded garments or a PET bottle is both cheaper and more sustainable. Arguably as or more sustainable, than a tag of organic cotton. But why is the latter so much so, well, sellable? Because the word 'organic' is emotionally resonant – to the customer, it signifies not harming the environment or the farmer, and that is something the customer is willing to pay more for. Harming the environment is a good goal, and in a warming climate, a necessary goal. Again, the issue comes down to communication: can the industry effectively communicate that increasing yields, like the CITI-CDRA has done, for example, is probably one of the most water-friendly measures one can take. India has an abysmal water footprint for its cotton - embedding about 8.6 litres of virtual water into every

Again, it comes down to communication, and reaching the last mile of farming – ensuring that farmers receive the right seeds, practises and water to optimize yield. Initiatives like the Better Cotton Initiative can help here.

I could write about carbon footprint of textiles, which essentially means how much power each of us uses to produce a kilogramme of cotton, or a metre of fabric. And where we get the power from – thermal power is the most carbon-unfriendly, while wind and solar are friendly. In my opinion, focussing on efficiency, as many of us are already doing, is an under-emphasized way to reducing carbon-impact, and one that needs more communication, and better recognition.

When I started writing and talking about climate change and water about eight years ago, many thought this was a mid-life crisis gone badly wrong. Today, we, as a society, have come a long way. Sustainability is here to stay, and businesses need to learn how to embrace it. Now the challenge is communicating what it means and ensuring a financially viable way for all of us getting there.



CHANGING PERCEPTION OF SUSTAINABILITY



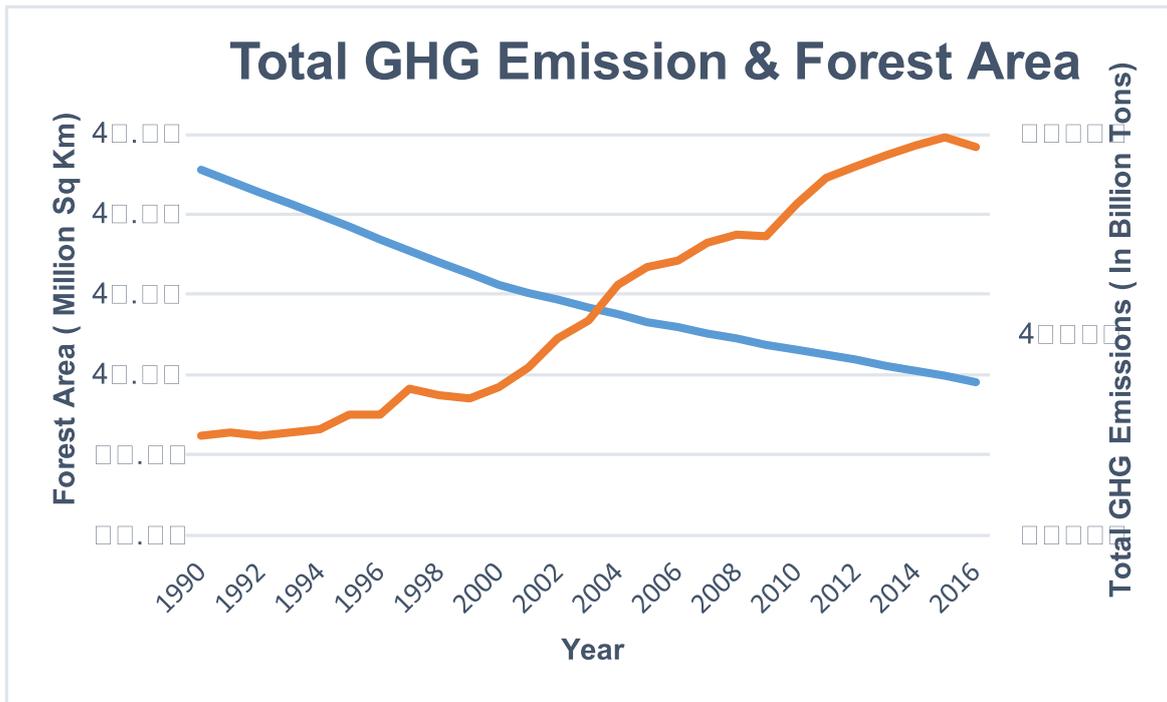
Mr. Uday Gill

Chief Strategy Officer - IVL Group, Indorama Ventures Limited

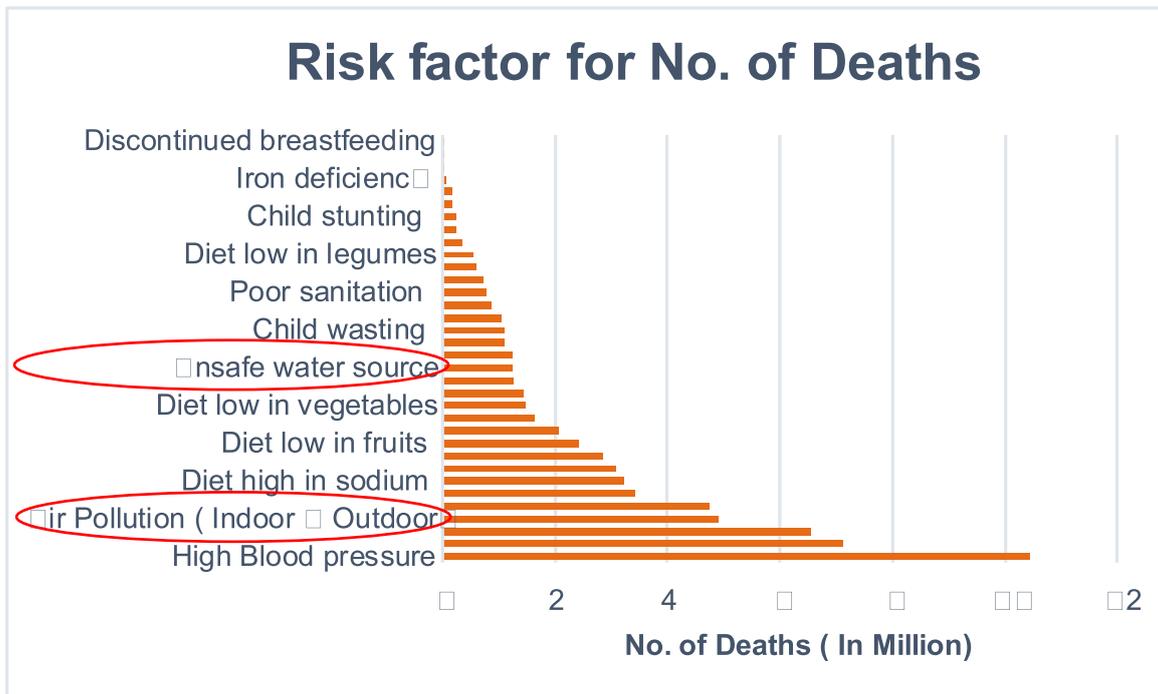
Sustainability was not a priority in the race to industrialisation. It came to the fore when intensive use of resources started affecting the whole eco system on which human existence depends. Now consumers as stakeholders have become conscious and aware of sustainability and carbon neutrality aspects and expect everyone in the value chain to take appropriate actions for the continued health of the eco-system.

Since the start of Industrial Revolution, production kept pace with the growing demand which is driven by population growth, economic growth, increase in disposable income and affluence. This phase has improved our quality of life and makes our day to day tasks much easier as human effort is supplemented by industrial energy. However, the resulting extensive usages of natural resources without fully appreciating the impact on the environment is fuelling pressures to be responsible in regard to our legacy that future generations will view.

Due to fact that the processes were not sufficiently understood, there were limited norms or policies issued by the Government / regulatory agencies for controlling the impact on environment. Advancement on the technological front were more focused on improving the efficiency and lowering the production cost. However, now depletion of natural resources and damage to the environment has been acknowledged by all the stakeholders. The chart below shows the impact on GHG and forest cover over a period of time. Air pollution is one of the biggest causes of unnatural deaths.



GHG (CO₂, CH₄, N₂O and F-gases – are summed up and measured in tonnes of CO₂ equivalents. Emissions from land use change – which can be positive or negative are taken into account.



In this context the concept of sustainability gained focus and coerced stakeholders to come together for taking appropriate actions for keeping a balance between Industrialisation and its impact on the environment.

Till recently, product development activities in the textile and apparel industries also revolved around efficiency and cost aspects. Focus on the environment

aspect was a priority only in areas where it helped to reduce cost. Industry was catering to the changing demand of the consumers and making best possible efforts to serve it. Though the trend has started shifting towards sustainable products, the progress is still slow and we expect it to gain pace in the coming years with sustainability strongly influencing the decision making process.

Sustainability in textile context means manufacturing of a product with optimisation of resources (raw materials, energy consumption, water, air and labour) and limiting impact on the environment. It also brings focus on maximizing Input/output efficiency, along with recyclability and renewability concepts. Sustainability has started becoming an integral part of the agenda of companies, governments and regulatory agencies.

The next generation consumers are very conscious of their individual environmental footprint and they want to know the story and impact of the products they consume. They will discriminate against products that are heavy on resource use and favour products compliant with sustainability benchmarks.

The fundamentals of sustainability are traditionally taken as the 3 'R's, Reduce, Reuse, and Recycle.

Technology, practices, and processes end up being facilitators to drive these objectives. However, all these have implications for how the textile business models will change and how will the supply chains be affected which is our principle concern here.

Nevertheless, recycling is the best hope for managing the textile waste problem. Even for the health of the industry production of fresh garments is what provides the most jobs and activity so reduced consumption and much reuse will have adverse impact by reducing gross demand. I am not suggesting to reduce consumption but be more resource light and embrace clean energy and clean technologies. For this reason the industry needs to actively work at finding good recycling solutions for textiles and garments.

Problems of Plenty – How can we reduce usage and what does this mean?

Over a period of time, economic growth and increase in disposable income has been leading to increase in apparel usages. As reported by BBC, the average consumer now buys 60% more clothing than they did 15 years ago. Globally, around 56 million tonnes of clothing are bought each year, and this is expected to rise to 93 million tonnes by 2030 and 160 million tonnes by 2050. However this is creating obstacles in our goal towards sustainability. There are some models which are evolving and may help reduce the impact.

Durable Design: Present 'fast fashion' business model with its frequent change of styles on offer is encouraging high-consumption leading to more pressure on landfills as garments are scrapped. According to the Ellen MacArthur Foundation, more than \$500 billion of value is lost every year due to clothing underutilisation and the lack of recycling. Various industry initiatives are taking place to design more durable clothing that will last longer. However, this will only help in reducing garment waste in non-fashion uses such as work wear. For help in garment waste reduction this initiative needs to be combined with developing systems to reuse the garments once the consumer has fulfilled his/her value expectation from the garment.

Garment Rental: There are many garment rental platforms that can give a fillip to durability by making it easier to **reuse** the garment and satisfy the consumer's desire to have frequent changes in design at a low cost. This is a win win solution for both the consumer and the environment. However, we have to keep in mind the sustainability impact of logistics of recollecting, refurbishing, and repacking.

The third 'R', **recycling**, is currently practiced more in down-cycling rather than true recycling. By true recycling we mean like to like recycling whereby a garment is recycled back to a garment of the same quality. Today, old garments are shredded and then through the shoddy process converted to coarser yarns that are converted to inferior quality products. However, normally these processes can be carried out only once and then the subsequent product is headed for landfill or incineration.

While this one time conversion is better than nothing, it is far short of what is needed and even this limited gain is taken for a very small portion of the total consumption of apparel.

There are initiatives being taken by major industry players to overcome these issues and lead our businesses to a more circular economy.

Design for recycling: One of the major issues in textile recycling is the multiple materials used in a typical garment. Even a so called 100% cotton garment could have polyester sewing thread used to make it and trims and accessories of various plastics. Most garments use a blend of 2 or more materials. Proper labelling will go some way towards helping future sorting systems to segregate the right material that can then be subjected to the right process. Fabric designs that allow different components to be separated more easily would also be useful.

In addition, we also need to keep in mind the separation of manufacturing from consumption. Most apparel is manufactured in Asia but a large part is consumed and disposed of in the West. To recycle the material in the consumption area would mean that we should reprocess this into garment in the same area for the most sustainable method. However, these areas usually do not have the manufacturing capability so the material needs to be shipped back to Asia for processing that detracts from sustainability.

Various technical solutions for separating the textiles into component materials and then recycling the synthetic parts back to their original chemical inputs are being tested but are still far from being commercially viable at scale. However, I am sure that we will have viable solutions within the next few years and these will change the landscape for the textile business.

Polyester, cotton and viscose are the three main fibres used in textiles. We can envisage processes that will be able to extract the cellulose from cotton and viscose and separate the polyester part. The extracted cellulose can then be used as feedstock for a clean viscose making process and the polyester can be converted to its original raw material (MEG plus PTA/DMT). Transportation of these bulk chemicals has low environmental footprint. Theoretically this will create the basis for 'like to like' recycling.

Practically, however, there are many issues that need to be resolved before this becomes reality. Not least of these is to create an infrastructure for collection of disposed garments and sorting these. Though all major retailers encourage consumers to return used garment to them, not many are returned and even the garments returned mostly end up being incinerated or sent to landfills. There is a small portion that is sent to developing countries for reuse but Covid really played havoc with those supply chains and these may never recover. In addition, there is a huge resistance from local textile lobbies against import of used garments.

Once recycling technology gets more mature, it will improve the recycling rates and efficiency. However it will have an impact on the players who are part of virgin raw material value chain. This will create competition and put pressure on them for exploring options. One option could be that these players start investing in recycling technology and bring their experience in front and serve the market as per the demand of the customers. However it will require significant amounts of investment and will require support from policy makers and respective Government institutes.

Other components of sustainability

As mentioned earlier, sustainability is a broad concept and for a textile product it starts from where the raw material came from, is it fossil fuel based or from renewable sources, if renewable sources then what kind of chemical and water load does it have for the environment, whether it used fair practices and labour, how much energy was used for the manufacturing and what kind of energy was used, whether harmful chemicals were used in the process, how many resources will it consume during its useful life and how will it be eventually disposed of, and perhaps some more concerns such as micro-plastics or other harmful residues.

To address these and other concerns collaborations have been formed among stakeholders for finding ways and means for taking more steps in the direction of sustainability.

- **Biotextfuture:** It is one of largest research project in textiles that comprises of a network of members from large to small and medium-sized enterprises, research institutions, led by RWTH Aachen University, Germany. They are focusing on developing sustainable bio-based raw materials, processes and arranging funds for basic research & improvements of existing solutions.
- **Sustainable Apparel Coalition (SAC):** A group of major companies in the apparel, footwear, and textile industries working together. They have developed a Higg Index tool which help them in measuring and scoring a company or product's sustainability performance at every stage in their sustainability journey. This tool gives a holistic overview for taking decision to protect factory workers, local communities and environment.
- **Textile Exchange:** It a global non-profit which accelerates sustainable practices in the textile value chain by focusing on minimizing the harmful impacts of the global textile industry and maximizing its positive effects. It creates leaders in the sustainable fiber and materials sector by providing learning opportunities, tools, insights, standards, data, measurement and benchmarking.
- **Zero Discharge of Hazardous Chemicals (ZDHC):** It enable brands, retailers and their supply chains in the textile, apparel, leather and footwear industries to implement chemical management best practices and advance towards zero discharge of hazardous chemicals by collaborative engagement, standard setting, implementation and innovation.



We at Indorama have pledged to invest 1.5 billion USD to increase recycling capacity. Simultaneously we are also working with machinery and technology providers on chemical recycling and collaborating with Industry associations and large users on developing whole circular economy eco-systems including educating students for changing the behaviour of consumers.

Textile industry is consumer driven and I am confident it will find solutions to the challenge and emerge more sustainable, innovative, and agile.

Pre-Covid, the apparel industry was under pressure to improve speed, lower cost, become more innovative, be more transparent, connect digitally and be more responsive to customer needs. Covid has acted as an accelerant to these pre-existing challenges and hastened the pace of digitisation. Remote working has become the norm in the industry. Initially implementation of various digital tools looked like a herculean task but now everyone is so much conversant with these tools that these have become part of day to day operation.

Way Forward

Sustainability is crucial in every industry as it maintains the quality of life by protecting diversity and ecosystems of the prime stakeholder, the planet Earth. . It is a systematic approach which brings focus on identification of processes that lead to the inefficient utilization of raw materials, energy, water and other resources and correcting these. Sustainability, circularity, and carbon neutrality with clean energy should feature more and more in the way we design, manufacture, transport, store, sell products and deal with the reuse and repurposing of post-consumer materials.

Sustainability over a period of time has evolved into a broader term, ESG (Environment, Social and Governance) and it has become a source of competitive advantage. Year 2021 will continue to be economically challenging for Textile industry but it will create opportunities for companies who have a focus on ESG, digital, innovation, supply chain efficiency, resilience, transparency and agility. At Indorama, every project has to go through a sustainability lens and we are sure the whole industry will adapt this as a regular way of working.



IMPORTANCE OF TRACEABILITY IN TEXTILE SUPPLY CHAIN



Mr. Avinash Mane
Commercial Head – South Asia and Middle East, LENZING AG

The movement to make the fashion and apparel industry ecologically sustainable has been ongoing for a while now. But, with the COVID-19 outbreak, the demand for the industry to adopt sustainability as a whole and not just in parts, has accelerated. According to a survey by McKinsey Sentiment towards Sustainability published in 2020, the consumer sentiment across Europe is strongly tilted towards sustainability. Of consumers surveyed by McKinsey, 57 percent have made significant changes to their lifestyles to lessen their environmental impact, and more than 60 percent report going out of their way to recycle and purchase products in environmentally friendly packaging. The study findings reveal that consumers are strongly considering sustainable materials as an important purchasing factor. Consumers now want to know who made the product, who is going to be benefitted from

the product along with the origin, materials, and history of the product. In such a scenario, traceability becomes very substantial.

As the textile and apparel industry re-organizes itself to overcome the economic impact by the COVID pandemic, it is imperative for brands to uphold their social and environmental responsibilities towards the environment and society at large.

While embracing more sustainable production and consumption patterns, the industry will also need to be mindful about managing value chains more effectively, identify and address labour and human rights violations and environmental impacts, combat counterfeits, and handle reputational risks. As part of this improving transparency and traceability needs to become a priority for the industry.

Traceability as a whole pushes for a more transparent textile supply chain. Traceability allows to trace the whole lifecycle of a product from the raw material to the consumer, to disposal and recycle. Traceability conveys the source location of the product at each step of the production process and at the same time the impacts the product is having on the environment and people of the society.

While, most of the top 100 fashion brands announced targets for 100% sustainable fibers target by 2025, however less than 5% of those brands can trace their textile inputs to verify the sustainability credentials of the fiber producers. As an effort to address this pressing challenge, three sustainability pioneers in the fashion industry in 2020 – Lenzing, Armed Angels and Schneider – joined hands with TextileGenesis™ to create an unprecedented level of traceability.

Fashion & textile is one of the most fragmented industries resulting in highly opaque supply chains. Therefore, there is a need to build a truly scalable fiber-to-retail traceability platform from the beginning of the production cycle.

Platforms such as TextileGenesis™ allow brands to issue digital blockchain 'assets' (or tokens) in direct proportion to the physical shipments of fibers such as

LENZING™ ECOVERO™ and Authentico®. These digital tokens provide a unique 'fingerprint' and authentication mechanism, preventing adulteration and providing a secure, digital chain-of-custody across the entire textile value chain.

Lenzing has always believed that traceability and sustainability are deeply interconnected and therefore took it on themselves to pave the way for the rest of the industry. Collaborating with TextileGenesis™ further showcases a 'first of a kind' blockchain-enabled traceability for its fibers specially TENCEL™ and LENZING™ ECOVERO™ fibers – the most sustainable viscose. The combination of physical markers in LENZING™ ECOVERO™ and the supply chain traceability on TextileGenesis™ creates the industry's most comprehensive fiber assurance mechanism – brands can be fully sure they actually receive when they pay for Lenzing's sustainable fibers.

As the industry prioritizes the continuous reduction of carbon emissions through more efficient production methods across the entire supply chain, using renewable energy sources and embracing new technologies. Embracing transparency in the entire textile supply chain is something the industry needs to look at with utmost urgency.

SUBSCRIPTION FORM FOR TEXTILE TIMES

ANNUAL SUBSCRIPTION : INR 700.00 US\$ 48.00

Contact Person _____

Company Name _____

Designation _____

Address _____

Phone _____ Fax _____ E-mail _____

Demand Draft/Pay Order in favour of "Confederation of Indian Textile Industry". Demand Draft/Pay Order/ Payable at Delhi. Cheque No.: _____

Please send the filled-in form and payment to:



Manoj Sharma, Deputy Secretary
Confederation of Indian Textile Industry
6th Floor, Narain Manzil, 23, Barakhamba Road, New Delhi-110 001
Phone: +91-11-23325012, 23325013, 23325015, 23325055
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MR. T. RAJKUMAR, CHAIRMAN, CITI'S
ADDRESS AT THE ASSOCHAM FOUNDATION WEEK 2020 ON
“FUTURE LIES IN THE PAST: LEVERAGING INDIA'S EMBEDDED
KNOWLEDGE TO PIVOT THE COUNTRY'S GROWTH STORY”



- I would like to congratulate ASSOCHAM, one of the apex trade associations of India on completing 101 years. Over the period of time, Assocham has emerged as a forceful, proactive, forward looking institution equipping itself to meet the aspirations of corporate India in the new world of business.
- Friends, The momentum of economic revival is picking up with more stimulus packages to make India self-reliant and make it an attractive global investment destination. We are confident that the Government of India's vision of becoming a US \$ 5 trillion economy will be possible by promoting 'Make in India – Make for World'. This can be realised through strengthening domestic manufacturing and integration with the global economy.
- The textile and clothing industry with great efforts and relentless support from the Hon'ble Prime Minister of India, Shri Narendra Modi Ji and the Hon'ble Union Textile Minister, Smt. Smriti Zubin Irani Ji has redefined itself and regained its lost confidence during the Covid-19 Pandemic period. The encouragement given by the Government, especially, Hon'ble Union Minister of Textiles has enabled the country to become second largest manufacturer of PPE manufacturing in just less than two months and today has become a net exporter of

PPE Kits. The Ministry of Textiles under the guidance of Hon'ble Union Minister of Textiles and Secretary, Textiles are bringing about a series of policy reforms to make Indian Textile and Clothing Industry globally competitive. We are extremely thankful to them for their continuous support and handholding to the textile industry.

- The historical reforms brought by the Government for the MSME sectors, especially the criteria for MSME eligibility, linking investment value to ITR, exempting export turnover, etc., have prevented closure of several lakhs of units and job losses for millions of people.
- To boost India's textile sector and unleash its full potential, the government plans to announce the National Textile Policy to make the sector globally competitive. Under the dynamic guidance of our Hon'ble Prime Minister and Hon'ble Union Minister of Textiles Indian Textile and Clothing Industry is determined to reach a market size of US\$ 350 billion by 2025, the Industry Stakeholders are working day-and-night in collaboration with the Ministry of Textiles to make it a reality.
- Cotton being the main-stay for the Indian Textile & Clothing Industry since a long time and major foreign exchange earner for the Indian economy, the Hon'ble Union Minister of Textiles, Smt. Smriti

Zubin Irani Ji launched the first-ever cotton brand “Kasturi” for the Indian Textile Industry on the occasion of World Cotton Day celebrated and jointly organized by Ministry of Textiles, CCI, CITI and TEXPROCIL. Being the largest cotton-producing country, it was the much-awaited demand of the Indian Textile Industry that Indian cotton should have its own brand and now with the launch of Kasturi, Indian cotton stakeholders can hope to get good price realization for their cotton products which usually fetch around 10% less realization while comparing the same with their counterparts at international markets.

- The Central Government has also launched a Production Linked Incentive Scheme (PLI) to attract diversification, investment and growth in the Man-Made Fibre (MMF) and Technical Textiles segments and boost India's share in these particular segments in the global textiles market. The scheme will give the much-needed impetus to the Government's initiatives of “Make of India” and “Atmanirbhar Bharat”. The scheme is extended for 10 key specific sectors, of which Textile is one of the sectors and has been allocated Rs 10,683 crore of the total estimated outlay of Rs. 1.46 lakh crore, mainly for MMF and technical textile segment”.
- Textiles is the second-largest employer in the country providing employment to 45 million people at present, and this number is expected to rise. Many

- textile companies are now focussing on exports and are hoping that revenues and profit margins would pick up in the coming months. Export order flow has improved significantly beginning with the second quarter of current fiscal due to reopening of departmental stores and pent-up demand. Demand is expected to stay strong in the third quarter as well due to the festive season.
- The Indian textiles & apparels sector has immense potential to deliver on the technology adaptability as Indian textile industry has the requisite strengths in terms of raw material availability, manpower availability, large domestic market, presence of complete manufacturing value chain.
- The Indian textile industry is transforming to suit the growing demands of the global textile market, focussing on technical textiles. Recent Government focus along with interest from private sector will help drive growth in the space. Plans to develop mega textile parks and emphasis on manmade fibres, alongside policy changes will attract higher investments, pushing overall growth for India.
- With these words, on behalf of Confederation of Indian Textile Industry (CITI), I once again thank ASSOCHAM for organizing this important and meaningful Session. We wish to have more such sessions in future together. Thankyou.

MR. S. K. KHANDELIA, DEPUTY CHAIRMAN, CITI'S **ADDRESS AT THE CII TEXCON 2020 ON** **“BUILDING INDIA’S COMPETITIVENESS IN TEXTILES AND APPARELS”**

Smt. Smriti Zubin Irani, Hon'ble Minister of Textiles and Women and Child Development, Government of India, eminent speakers, distinguished delegates, ladies and gentlemen,

I am thankful to CII for having provided me this opportunity to put forth my views on this very important topic which has been agitating the minds of everyone in the industry and policy makers in the Government.

I firmly believe that Indian Textile and Clothing Industry has inherent strength as shown in case of production of PPE kits from zero to hero and it can be globally competitive and double the industry size and exports in next 5-7 years. However, **we need to think big and act fast, do different things differently visualizing global industry scenario in 2025-2030.** We need to have innovative out of the box thinking and adopt new ways of doing business and the best international practices.

To emphasise the importance of my this view, I give a

simple example. Earlier, we used to have two cars in the country, Ambassador and Fiat. They are nowhere to be seen today because they continued to make the same car in same manner.

Presently, industry is going through a paradigm shift, popularly referred to as 4th Industrial Revolution or “**Industry 4.0**”. The future of industry lies with **digitalization, use of artificial intelligence, robotics, internet of things, online data monitoring and analysis, online customer interface, virtual sampling, 3D visualization, virtual show rooms and so on.** These automates work flows, makes the process faster and enables traceability of delays and distortions in real time.

Product diversification is the crying need of the hour. About 70% of the global consumption and trade is **MMF based textiles and clothing** where our presence is minuscule due to being non-competitive because of **non-availability of raw materials at international competitive rates in India, inverted GST structure,** no production of value

added items including **functional textiles like sportswear, winter-wear, smart garments etc., in the country.** We need to aggressively increase production of MMF based textiles and clothing including value added items in the country.

Scale is essential to achieve global competitiveness. We need to have world class large factories. We need to attract large investments including FDI by **ensuring enabling environment and ecosystem** by further improving **ease of doing business** like unified single window clearance for all Central and State Government permissions to set up and run an industry, **correcting structural impediments** like loading industrial power tariff with cross subsidy surcharges and levies to make open access power prohibitive, removing infrastructure bottlenecks, etc.

Besides, we need to have collaborative approach and **value chain partnership** to add strength to our fragmented industry structure.

Consumers are increasingly preferring **sustainable and environment friendly products** coming out of sustainable manufacturing facilities having judicious use of natural resources and sustainable practices.

Manufacturing excellence in smart factories with **lean manufacturing** practices to improve productivity, give consistent quality, reduce costs, ensure timely delivery, **product and process innovation** with continuous improvement plans to meet **ever changing aspirations and behaviour of end consumer.**

We need to have domestic global brands. Large players need to join hands with value chain partners to deliver branded products to end-customers. Liva Global Retail brand created by Grasim is perfect and successful example of this. RE-LAN of Reliance is another example. We need to encourage domestic machinery manufacturing as most of the machines are being imported at very high cost increasing project cost.

To conclude, I do admit that there are many challenges on our way to make Indian textile and clothing industry globally competitive but it is **my strong conviction that no challenge and / or hurdle can be bigger than our resolve and underlying efforts to succeed.**

My this conviction is based on my personal experience. Sutlej has one of its units, namely, Chenab Textile Mills at Kathua in the State of Jammu & Kashmir, set up about 60 years back. The unit was almost on the verge of closure in 1980.

However, management of the company resolved to continue the unit and to make it profitable and self-sustaining unit despite numerous challenges and hurdles. Today it is the largest dyed yarn manufacturing unit in the country employing about 8000 persons directly and thousands others indirectly and having turnover of Rupees Thousand crores plus.

Opportunity is once again knocking at our door and we should not miss the bus this time.

Thank you very much for giving me patience hearing.

CITI SUGGESTIONS ON “PROMOTING QUALITY AND PRODUCTIVITY IN INDIAN TEXTILE INDUSTRY” AT THE DPIIT- QCI UDYOG MANTHAN WEBINAR BY MR. T. RAJKUMAR, CHAIRMAN, CITI

- Indian Textile & Apparel (T&A) Industry plays a significant role in the Indian economy as it not only contributes about 2.3% in our GDP but also have a share of about 11% in India's total exports to the world.
- India has got abundant availability of natural as well as man-made resources, skilled man-power, infrastructure, logistics and all other factors and is one of the few countries which have strong presence in the entire textile value chain, yet, Indian T&A Industry has not thrived with the pace it should have.
- The countries like Bangladesh, Vietnam, Sri Lanka and along with other LDCs are performing exceptionally well in terms of their size and magnitude of exports despite the fact that they are highly dependent on imports for their raw material and intermediate products.
- We all know that Textile and Apparel manufacturing has always been associated with low-cost manufacturing and is thus driven by high Productivity and Quality aspects. These two factors are of immense significance to all the developing nations, particularly due to their contribution in enhancing cost competitiveness in terms of scale of production and timely delivery, thus propelling economic growth in the long run
- Buyers today are increasingly looking for full package suppliers who are offering them, scale, quality and variety in the shortest time period at internationally competitive cost.
- High Quality of end products start at the raw material level itself. India being a traditional manufacturer of cotton-based T&A products, its

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18th JANUARY, 2021
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Challenges & Opportunities
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**Line Ministry
Context Setting**

Session Moderator

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Joint Secretary
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Sh. Sarbajit Ghose
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S P E A K E R S

Sh. T. Rajkumar
Chairman of Confederation of
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Sutlej Textiles

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Gimatex Industries

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TUV Rheinland (India) Pvt. Ltd.

P A R T N E R S

manufacturing to achieve high productivity and quality which today is also known as manufacturing excellence. To achieve this, a combined effort from every value chain member starting from fibre production to manufacturing to consumption will be required

Industry need to take small steps like:

- Efficient production planning to enhance operational efficiencies and resource utilization
- Use of latest technology to obtain maximum production efficiency, output quality, and cost optimization

high time to increasingly focus on reducing contamination from cotton fibre by using modern techniques and practises being used in the developed nations, USA, China, Brazil, Australia, etc.

- I am sure the first-ever cotton brand “Kasturi” which was launched by the Hon'ble Union Minister of Textiles, Smt. Smriti Zubin Irani Ji on the occasion of Word Cotton Day will enable Indian cotton stakeholders to get good price realization for their cotton products.
- It is also high time for the Indian manufacturers to invest in robust client management system to keep them updated about the latest requirements of their international clients to fetch big orders which will help them to strengthen their supply chain and deliver quality products on time.
- For increasing productivity industry need to make huge investments in strong manufacturing ecosystem, large scale production houses, skilled manpower, advance technologies, state-of-the-art machineries, and presence in complete value chain to fulfil the demand of international buyers and provide them with one-stop solutions for their textile and garment needs.
- Textile Industries world over utilize the growing concepts of Information Technology in

- Incorporating product lifecycle management to achieve material saving and obtain zero defects
- Integration of various technologies for achieving the best process control
- Skill training to improve productivity and reduce wastage
- When the industry utilizes the concept of manufacturing excellence on real time basis it not only ensures the optimum utilization of machinery and infrastructure but also does the most efficient use of natural resources and thus maintains the right balance. However, as also suggested by our Hon'ble Union Minister of Textiles, Industry should also adhere to the compliance and labour standards.
- In this regard, the norms published by various textile research Associations especially SITRA, ATIRA, BTRA and NTRA are very much useful for the industry to meet the customer requirements in a cost effective manner.
- In the last decade, levels of modernization have significantly improved depicting an increasing focus on technology improvement. Modern and efficient machineries, integrated manufacturing systems, etc. are being incorporated in the industry. However, this wave of modernization has still not

penetrated throughout the industry, again due to its unorganized and fragmented nature.

- Majority of small-scale units, due to lack of credit facilities, operating across various clusters in the country, still rely on age old machineries for their production which increases cost of production and lack productivity and quality.
- Vertical integration, uniform standards and improved business processes, cross functional alignment, integrated knowledgebase, and better performance measurement functions are some of the manufacturing good practices required for the large pool of SME manufacturers.
- Every year, Government rolls out various schemes for technology upgradation, however, unawareness about schemes, technologies, newer systems and unorganized & fragmented nature of the sector are the big reasons for the underdeveloped nature of our industry.
- The major challenge being faced by the industry today is high labour attrition and absenteeism and therefore, the industry is finding extremely difficult to implement any scientific systems properly. The industry needs to adopt proper retention policies, labour welfare measures and counselling to control this. The industry also needs to adopt modern concepts like lean manufacturing, six sigma and other industrial engineering principles to improve quality and productivity.
- Our industry's core competence still lies in manufacturing of common cotton-based products such as yarn, fabric, etc. in which our industry has also grown comfortably and restricting itself from taking up newer challenges. On the other hand, countries like China, Korea, Vietnam, Bangladesh, etc. have worked relentlessly in the direction of innovation, technology upgradation and skill development and have come up with newer products and set themselves apart in the global textile landscape. Today, there is an urgent and growing need for our industry to focus on diversifying itself especially in MMF and Technical Textiles and offer more innovative products to the consumer countries.
- Today, if India needs to compete with established manufacturing powerhouses like China, Korea, Bangladesh and Vietnam then it needs to raise its manufacturing levels to manifolds, bring in state-of-the-art technologies, improve infrastructure across the textile value chain.
- I am not only confident but rest assured that with a supportive Government at the centre, our textile and clothing industry can overcome any challenges and hurdles and will bring its productivity and quality at par with the international standards in the shortest period of time and become globally competitive.

**CITI SUGGESTIONS ON
"PROMOTING QUALITY AND PRODUCTIVITY IN INDIAN
TEXTILE INDUSTRY"
AT THE DPIIT- QCI UDYOG MANTHAN WEBINAR BY
MR. S. K. KHANDELIA, DEPUTY CHAIRMAN, CITI**

- i) Cost optimisation by optimum use of all resources like man, machine, material, utilities, capital, land, etc.
- ii) Efficiency improvement by skilling and re-skilling of manpower including supervisors, managers and even of top management including promoters for re-orientation of ways of doing by adopting international best practices and out of box thinking.
- iii) Zero down time of machines and equipments by preventive maintenance to avoid crash landing and to have planned landing.
- iv) Product and process innovation on continuous basis.
- v) Adopting continuous improvement plans.
- vi) Adopting Industry 4.0 (Fourth Industrial Revolution techniques) like Artificial Intelligence, digitisation, internet of things, virtual sampling, 3D simulation, virtual interface with customers, robotics, automated systems requiring least human interference, on line data collection, analysis, monitoring and correction, online testing, etc.
- vii) Industry needs to visualize what are going to be the headlines in 2025-30 and should prepare themselves accordingly.

FIRST COTTON BRAZIL OUTLOOK

SUCCESSFULLY HELD ON 21ST JANUARY 2021 ON VIRTUAL PLATFORM



We are happy to inform you that first Cotton Brazil Outlook was successfully held on Thursday, 21st January 2021 on Virtual Platform at 5.00 P.M. (Indian Standard Time). The mega event was jointly organised by Brazilian Cotton Growers Association (ABRAPA), Brazilian Cotton Shippers Association (ANEA), Brazilian Trade and Investment Promotion Agency (Apex-Brasil), along with the Brazilian Embassy in New Delhi and the Confederation of Indian Textile Industry (CITI). A

large number of delegates comprising of bureaucracy, trade experts and businessmen from India and Brazil participated in the virtual event.

The first cotton Brazil outlook connected Brazilian cotton players with Indian textile industry to discuss trade, technology, sustainability, quality and traceability of Brazilian cotton. This important platform provided a unique opportunity to interact with Brazilian cotton growers and merchants. The event was focused on the innovations and outlook for the Brazilian cotton sector, with a special focus on the Indian textile industry.

Agenda of the Cotton Brazil Outlook

Agenda	Speakers
Welcome	Marcelo Duarte (ABRAPA)
Welcome Remarks	Mr J Thulasidharan, Past Chairman, CITI And President Indian Cotton Federation
Welcome Remarks by Embassy of Brazil	Ambassador André Corrêa do Lago
Welcome Remarks by Abrapa's President	Julio Busato (ABRAPA)

Presentations on:

Indian Cotton Sector	Atul Ganatra, President Cotton Association of India)
Brazilian Cotton Production and Crop Estimates for 2020/21	Julio Busato (ABRAPA)
Quality of Brazilian Cotton	Edson Mizoguchi (ABRAPA)
Global Trade and Brazilian Export Estimates for 2020/21	Henrique Snitkovski (ANEA)
Sustainability and Traceability of Brazilian Cotton	Carlos Moresco (ABRAPA)
How the Cotton Brazil Initiative can Add Value to the Indian Textile Sector	Marcelo Duarte (ABRAPA)
Closing Remarks	Milton Garbugio (ABRAPA)

On this special occasion, an MOU between Confederation of Indian Textile Industry (CITI) and Brazilian Cotton Growers Association (ABRAPA) was signed in order to enhance mutually beneficial cooperation and exchanges in the textile and clothing industries and to support each other in the events that either is organising.

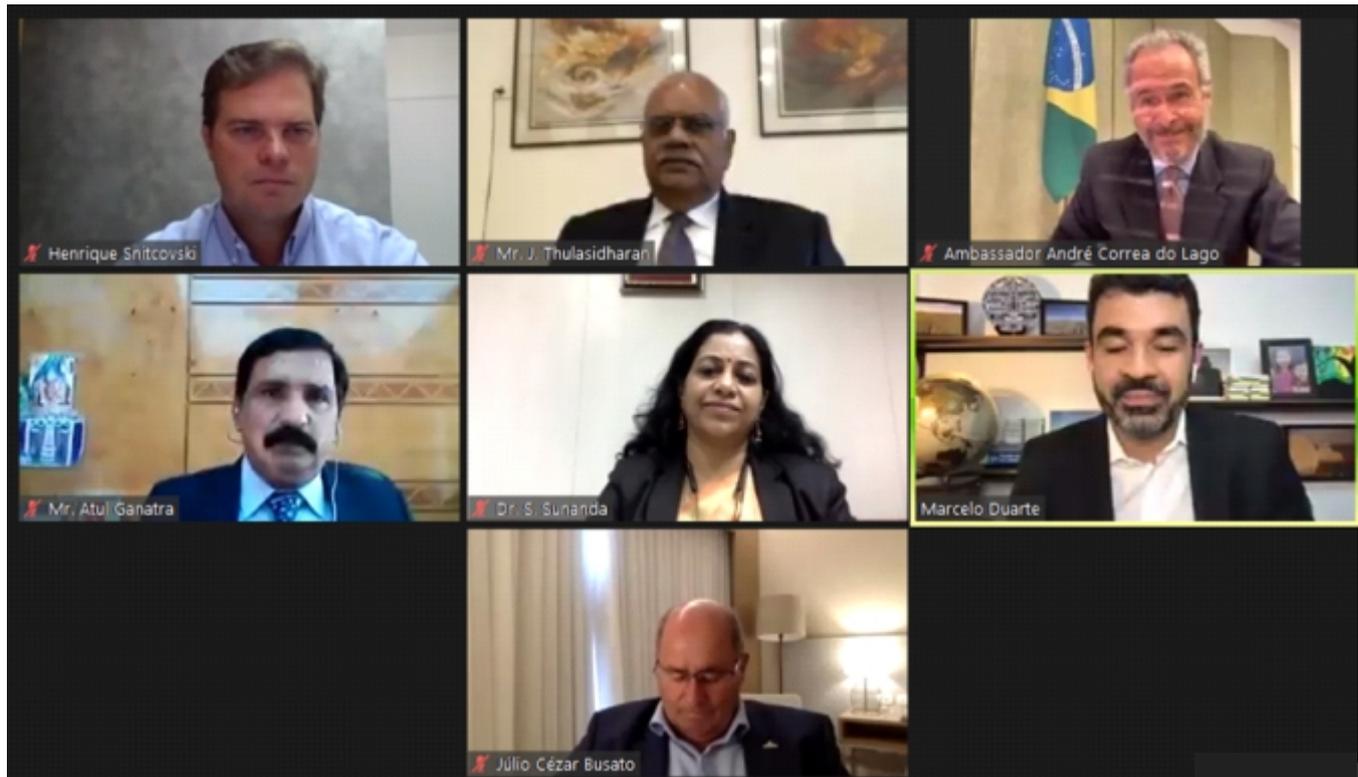


MR. J. THULASIDHARAN PAST CHAIRMAN, CITI AND PRESIDENT, ICF'S ADDRESS AT ABRAPA - CITI COTTON BRAZIL OUTLOOK

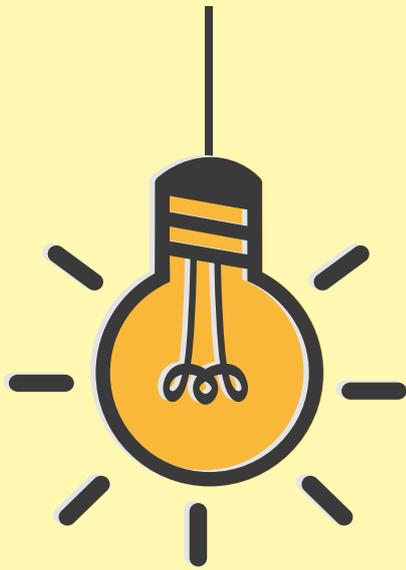
- At the outset, on behalf of Confederation of Indian Textile Industry (CITI), one of the Apex Textiles and Clothing Association in India and 1st Cotton Brazil Outlook Organizers, I whole heartedly welcome Hon'ble Ambassador, Embassy of Brazil in India, President, ABRAPA, Mr. Julio Cezar Busato, President, Cotton Association of India, Shri Atul Ganatra, distinguished speakers from ABRAPA, National Association of Exporters of Cotton (ANECA), APEX Brazil and all others delegates who are connected with us today from different parts of India, Brazil and World on this auspicious occasion of launching of the 1st Cotton Brazil Outlook.
- It is a great honor and privilege for CITI to partner with Embassy of Brazil in India and ABRAPA in organizing this webinar. Our Special thanks to Mr Dalci de Jesus Bagolin, Agricultural Attaché, Ministry of Agriculture, Livestock and Food Supply, Embassy of Brazil in New Delhi – India for connecting both Confederation of Indian Textile Industry (CITI) and ABRAPA for exploring the possibilities of business growth in the cotton sector and partnering with CITI in organizing this important event.
- Brazil has a very long traditional relationship with India, especially in the cotton sector as both are major producers of cotton. I am sure that the 1st

Cotton Brazil Outlook will connect the Brazilian cotton players with the Indian Textile Industry for discussion of trade, technology, sustainability, quality and traceability of Brazilian Cotton. I am also confident that today's webinar will be fruitful for the entire Textile & Apparel Value chain of India and Brazil.

- As per USDA, Brazil is the 2nd largest exporter of cotton in the world after USA. China, Vietnam, Indonesia, Bangladesh and Turkey have been the major export destination for Brazilian cotton. Though India is not a big importer of cotton but owing to the great demand of cotton in India, Brazilian cotton exporters have a vast untapped potential in Indian markets
- Friends, we all know that India is not only the leading producer of cotton in the world but also one of the largest consumers of cotton with an annual demand ranging to about 330-360 lakh bales of 170 kg each.
- Cotton has been the pride and prime of Indian Textile Industry. It has been the major competitive strength of the country with most exports being dominated by cotton and even today the share of cotton in India's total fibre consumption is still above 60% while it is 30% across the globe.



- India accounts for 38% of the world area under cotton and Indian Government is taking various initiatives to improve productivity, quality and branding Indian cotton and its products across the value chain in which India has a bright future and would ever remain competitive.
- Indian cotton textiles industry is over 5000 years old; 24.50 million people are employed in agriculture ginning and pressing and over 70% of the people in the entire textile value chain is again employed in this industry. Therefore, making our Indian cotton quality as one of the best in the world and producing high value-added products out of the same has been the strength of India for a long time period.
- Today the Indian Cotton Spinning Sector is world class, fairly modernized and produces finest quality yarns. India is also the leading producers of cotton yarn in the world. Indian Cotton Spinning Sector is considered as the Sunshine Sector of the Indian Textile and Clothing Industry.
- On the occasion of 2nd World Cotton Day, Hon'ble Union Minister of Textiles and Women & Child Development Smt. Smriti Zubin Irani Ji launched the 1st ever Indian cotton brand “Kasturi” which represent Whiteness, Brightness, Softness, Purity, Luster, Uniqueness and Indianness.
- Moreover, to ensure sustainability, integrity and end-to-end traceability of the organic products, India is also working on a certification system based on comparable international standards verified through internationally acceptable institutional system.
- With the launching of Cotton Brazil Outlook, India is also likely to be benefitted in field of technology, sustainability, quality and traceability.
- CITI's Cotton Development & Research Association and also Southern India Mills Association (SIMA) Cotton Development & Research Association, a sister concern of our regional member Association, have been directly helping the cotton farmers and trade to improve cotton production, productivity and quality.
- With the signing of MOU between Brazilian Cotton Growers Association (ABRAPA) and Confederation of Indian Textile Industry (CITI), we can explore more avenues for cotton development, especially in the development of speciality cotton, Extra Long Staple (ELS) cotton, organic cotton and naturally coloured cotton as these are going to have a good demand in India in the upcoming future.
- I once again congratulate ABRAPA on launching of their 1st Cotton Brazil outlook and wish them a great success ahead.



Textile INNOVATIONS

.....NEXT BIG THING AHEAD.....

MATERIAL TRENDS OFFER OPPORTUNITIES FOR TEXTILE SUSTAINABILITY CHALLENGES



TEXTILE presents sustainability challenges as the world moves to a more circular economy, but recent trends provide an opportunity to surpass these.

“The initial challenges are almost insurmountable, but we’re starting to chip away at that,” said Andrew Dent, executive vice-president for research of Material ConneXion, a New York-based materials consultancy. In a presentation on sustainable material trends at the recently held TELA Conference 2021, he gave examples related to reduced waste from digital manufacturing, new performance treatments, dyeing technologies, leather and cotton-free alternatives, and end-of-textile-life practices. “These innovations are small-volume. That’s the concern. How do we take these innovations and have them end up as larger volume solutions for the market?”

SUSTAINABLE MATERIAL TRENDS

A way to reduce textile waste that has emerged is 3D (three-dimensional) or digitized knitting, where items are produced by inputting design information into a program, and a machine knits the information using only the needed materials. Companies that use the technology include the Swedish furniture company Ikea, which uses it for one of its chairs.

Meanwhile, Dutch dyeing technology supplier DyeCoo has a waterless dyeing solution that is able to infuse dye particles into an entire bolt of fabric. “Pigments fall like water, even though they’re still like gas, then go through

the fabric so zero water is needed,” said Mr. Dent. “It dyes entire bolts in one go with zero water, but does require more of a capital investment. These are not small machines.”

Material manipulation is another growing trend in the textile industry. Liquid silk, for one, is a water-based, non-animal protein source that is being used to create a coating on other lower cost, readily available fabrics. The resulting fabric has the feel of silk without the need to actually produce it from silkworms. Meanwhile, mushrooms are being utilized by San Francisco-based startup MycoWorks to produce leather-looking membranes. “Although not having quite the same durability as real leather, it does have the same look and feel, and composts safely at the end of its material life,” Mr. Dent said.

One problem is what happens to textiles after they’ve come to the end of their usefulness. Brands such as OSOM use upcycled yarns from discarded garments to reduce textile waste. The company pulls fabrics apart through a machine that maintains the fabric’s fiber length and thus integrity.

As Mr. Dent explained, “The challenge with recycling natural fabrics such as cotton is that they’re made of individual fibers that are spun together. When you chop those fibers up, the less strong the resulting fabric is. OSOM is able to pull fabrics while maintaining 80% of the fiber length of those yarns.”

FIBRES DERIVED FROM TEXTILE AND CLOTHING WASTE TO BE COMMERCIALISED

NEW REPORT HIGHLIGHTS CELLULOSIC FIBRE DEVELOPMENTS WHICH WILL HELP BRANDS AND RETAILERS PROVIDE ENVIRONMENTALLY SUSTAINABLE TEXTILES AND APPAREL.



Several innovative start-up companies have recently made huge progress in developing cellulosic fibres derived from textile and clothing waste and some of these fibres are poised for commercialisation in 2021, according to a new 31-page report entitled Innovations in cellulosic fibres derived from recycled textile and clothing waste, from the global business information company Textiles Intelligence.

Brands and retailers are under immense pressure to provide textile and apparel products which are environmentally sustainable. At the same time, there is an urgent need to reduce the amount of waste

generated by the fashion industry, which is estimated at 92 million tons a year, the report says.

Making cellulosic fibres from materials derived from textile and clothing waste is one way of addressing these two key challenges, not least because such fibres are biodegradable and are therefore considered to be more environmentally sustainable than synthetic fibres and cellulosic fibres made using conventional processes, the report expands.

Furthermore, it says, cellulosic fibres derived from textile and clothing waste can themselves be used as feedstocks in recycling processes when the textiles and garments which incorporate them have reached the ends of their useful lives, thereby contributing towards the development of a circular economy.

Some start-up companies--such as Evrnu and Renewcell--have focused on the development of pulp derived from textile waste. This pulp can, in turn, be used as an alternative to wood pulp in the manufacture of cellulosic fibres such as lyocell and viscose. Meanwhile, Infinited Fiber Company has developed its own "unique" cellulosic fibre which is made from cellulose derived from textile waste, and Spinnova is scaling up the manufacture of its specialist cellulosic filament fibre which is produced from pulp without the use of a dissolving process. In addition, Spinnova is conducting research into the use of textile waste and bio-based waste as feedstocks.

Some of these companies are poised to commercialise their products in 2021, representing an exciting opportunity for textile and apparel companies seeking to improve the environmental sustainability of their products.

Indeed, cellulosic fibres derived from textile and clothing waste are attracting high commercial interest, and a number of the apparel industry's key players, including H&M Group, Kering and Patagonia, have invested in start-ups innovating in this field. Other companies, such as Adidas, Bestseller, Levi Strauss & Co, PVH and Wrangler, have established partnership agreements through which they are exploring the use of such fibres in the manufacture of innovative new products.

Looking to the future, demand for cellulosic fibres, and lyocell in particular, is set for healthy growth, and so there is much opportunity for providers of cellulosic fibres derived from textile and clothing waste, the report continues. Collaboration is key to bringing such products to market, the report explains, and, to support progress in this area, some major industry projects have been established, including the Full Circle Textiles Project: Scaling Innovations in Cellulosic Recycling, and the New Cotton Project.

However, it should be noted, the report points out, that start-ups entering the market are competing with some industry heavyweights, including Asahi Kasei, Birla Cellulose, Lenzing, Sateri, and Tangshan Sanyou. Consequently, they will need to keep abreast of the latest developments, notably those relating to traceability. Consumers are demanding increasingly that materials incorporated in textile and apparel products are capable of being traced along the entire supply chain. This is considered to be particularly important in relation to fibres derived from recycled materials, and Lenzing has made major strides in this area through its use of innovative blockchain technology.

PRESS RELEASES

FACILITATE GLOBAL COMPETITIVENESS FOR MMF TEXTILE INDUSTRY – NCTC APPEALS TO PARLIAMENTARY STANDING COMMITTEE ON LABOUR

New Delhi, Tuesday, 19th January 2021: The Parliamentary Standing Committee on Labour chaired by Shri Bhartruhari Mahtab, including Hon'ble Members of Parliament, Shri Subbarayan (Tirupur) and Shri Shanmugam (Rajya Sabha) visited Coimbatore and Tirupur on 19th January 2021 to study the potential for the growth of MMF textile industry in Tamilnadu. The Committee had an interaction with the National Committee on Textiles & Clothing (NCTC), comprising of Confederation of Indian Textile Industry (CITI), Apparel Export Promotion Council (AEPC), The Cotton Textiles Export Promotion Council (TEXPROCIL), The Synthetic & Rayon Textiles Export Promotion Council (SRTEPC), Powerloom Development & Export Promotion Council (PDEXCIL), Indian Technical Textile Association (ITTA) and Tirupur Exporters' Association (TEA).

Shri Sanjay Sharan, Joint Secretary, Shri J. Karan Singh, Trade Advisor, Ms. Roop Rashi, Textile Commissioner and other officials from Ministry of Textiles, Shri Narendra Kumar Santhoshi, DDG, Ministry of Chemicals and Fertilizers, Government of India and Shri Shambhu Kallollikar, Principal Secretary, Handlooms & Textiles Department and Dr. M. Karunakaran, Director of Handlooms & Textiles and other officials from the Department of Handlooms and Textiles, Shri Vallalar, Commissioner of Labour and other officials from Department of Labour, and also officials from PPF, ESI, DISH from Government of Tamilnadu participated in the meeting.

Shri T. Rajkumar, Coordinator, NCTC and Dr. A. Sakthivel, Chairman, AEPC informed the Standing Committee on Labour that Tamilnadu being the largest textile manufacturing State accounting 1/3rd of the textile business of the Nation, housed with excellent infrastructure and eco-system for innovation and manufacturing of high value added manmade fibre textiles, there is a tremendous potential for attracting new investments including FDI / JVs and creating new jobs for several lakhs of people. Dr. A. Sakthivel, Chairman, AEPC, Shri Ashwin Chandran, Chairman, SIMA and also representing TEXPROCIL and SRTEPC, Shri M. A. Ramasamy, Chairman, PDEXCIL, Dr. S. K. Sundararaman, Chairman, ITTA and Shri Raja M. Shanmugam, Chairman, TEA interacted with the Standing Committee.

Since India, particularly Tamilnadu has reached saturation in the manufacture of cotton textiles and clothing products, there is a tremendous scope for India to grab the opportunities thrown by China especially in the post-Covid-19 scenario, if a conducive policy is announced for man-made fibre textiles and clothing products by facilitating a level playing field in the globalized environment. As India accounts for only 2.2% of the global MMF textile trade, the Ministry of Textiles has proposed a Focus Product Incentive Scheme for 40 HS lines of MMF Garments and 10 HS lines of Technical Textiles under the Production Linked Incentive Scheme recently announced by the Central Government. The global trade of these 50 HS line products is around US\$ 222 billion and the existing share of India is very dismal.

NCTC stated that the anti-dumping duty and customs duty protection given for the domestic manufacturers and 18% GST on manmade fibres and 12% GST on MMF yarn have been curtailing the growth of the MMF Sector in India. India could not import even speciality fibres that are not manufactured in the country under nil duty. These MMF raw materials are produced by a very few manufacturers. Cotton produced by over 6 million farmers does not attract any duty and made available

cheaper than the international price. MMF is expensive upto 23%. Therefore, NCTC appealed to the Standing Committee on Labour to recommend removing anti-dumping duty and also slotting the entire MMF value chain under 5% GST rate on par with cotton value chain apart from addressing inverted duty structure issues at processing and capital goods. Based on the representation made by NCTC, the Hon'ble Prime Minister, Shri Narendra Modi Ji has already removed the ADD on PTA, Acrylic Fibre and rejected the proposed ADD on PSF and MEG, thus enabling global competitiveness for the polyester segment while the removal of ADD on VSF is under active consideration.

Since the new Labour Codes would be implemented shortly, NCTC sought certain amendments in the new Codes to ensure Ease of Doing Business. Fixing uniform minimum wages across the country for all trades / job roles is essential to create a level playing field. There is a huge variation in the rates of minimum wages between States and also between trades / job roles within the State. NCTC also appealed to the Standing Committee on Labour to advise State Governments to avoid applying Juvenile Justice Act that defines the child labour as 18 years below while Factories Act permits employment of adolescent workers aged between 16 and 18 subject to

PRESS RELEASES...

certain conditions. NCTC further appealed to the Standing Committee to curtail the harassment of NGOs especially the textile clusters in Tamilnadu and tarnishing the image of the Nation in the global market. NCTC stated that Tamilnadu textiles & clothing industry pays highest wages rates and better welfare facilities to the workers. This is evident from millions of migrant workers coming to Tamilnadu from different parts of the country and employed in the State.

The officials from the Ministry of Textiles briefed about the various schemes and recommendations made by the Ministry to facilitate global competitiveness and enhance MMF production in the country. The Principal Secretary, Handlooms & Textiles Department, Government of Tamilnadu briefed about the various schemes and efforts taken by Government of Tamilnadu to increase MMF manufacturing facilities in Tamilnadu and indicated that two mega textile parks are being planned under Mega Textile Parks. He added that the State would give major thrust for increasing technical textile production in the State. Regarding compliance of labour laws and industrial relations, the Committee was highly impressed after the interaction with the industry and the State government officials. The Standing Committee on Labour, Chairman, in his concluding remarks stated that the Committee would consider the recommendations made by the industry, make suitable recommendations so that Tamilnadu especially Tirupur and Coimbatore clusters would prosper in MMF textiles manufacturing.

NCTC APPEALS TO HON'BLE PM FOR THE REMOVAL OF ANTI-DUMPING DUTY ON VISCOSE STAPLE FIBRE (VSF)

New Delhi, Sunday, 10th January 2021: National Committee on Textiles & Clothing (NCTC) appealed to the Hon'ble Prime Minister for removing Anti-Dumping Duty (ADD) on Viscose Staple Fibre (VSF) and address the VSF spun yarn availability and price issues to prevent job losses and stoppage of production across the VSF textile value chain.

The textile industry has been facing stagnation since many years mainly due to the lack of availability of the basic raw materials of man-made fibre / filament yarn at internationally competitive prices. Taking a serious view of the high price of VSF in India, the captains of the various segments of VSF value chain, viz Apparel Export Promotion Council (AEPC), Confederation of Indian Textile Industry (CITI), The Clothing Manufacturers Association of India (CMAI), Indian Spinners Association (ISA) and Powerloom Development Export Promotion Council (PDEXCIL) under the common platform of NCTC have unanimously submitted a joint representation to the Hon'ble Prime Minister of India for the removal of Anti-Dumping Duty on Import of VSF to achieve global competitiveness and accomplish the target of US\$ 350 billion by 2025 set by the Ministry of Textiles for the textiles and apparel sector. They have also requested the Hon'ble Union Minister of Textiles and Secretary, Textiles to support the textile industry in this regard.

NCTC observed that "owing to the growing demand for Viscose Staple Fibre and its blended textiles and clothing market opportunities, the demand for Viscose Staple Fibre has increased steeply not only in India, but also across the globe. As the imported yarn prices was cheaper due to the high anti-dumping protection given for the domestic Viscose Staple Fibre, the weaving and knitting sectors have been importing large volume of VSF spun yarn. The import of VSF spun yarn has increased from 2 million kgs during 2016-17 to 56 million kgs during 2019-20".

NCTC also highlighted in the appeal that "in the post-Covid market scenario, VSF price has increased from US \$ 1.15 to US\$ 1.50 per kg during the last few months. As the domestic VSF spun yarn price was expensive compared to imported VSF spun yarn due to anti-dumping duty (upto US\$ 0.512 per kg), the demand for domestic spun yarn got reduced and therefore, the availability and price are affecting the entire VSF value chain especially the knitted and powerloom sectors. All the major VSF Powerloom clusters in the states like Tamil Nadu, Maharashtra, Gujarat, etc are agitating against the steep increase in VSF prices".

In view of the above, NCTC has appealed to the Hon'ble Prime Minister to remove the anti-dumping duty levied on Viscose Staple Fibre on a war footing to address the burning issue, grab the emerging market

PRESS RELEASES...

opportunities and to protect the livelihoods of several lakhs of workers employed in the VSF textile value chain. This is the second appeal to the Hon'ble Prime Minister, in this regard.

At the same time, NCTC highly appreciates that the Hon'ble Union Minister of Textiles has recommended to the Government for supporting the textile industry in removing Anti-Dumping Duty (ADD) on the import of Viscose Staple Fibre (VSF) as it ensures availability of raw materials at economical prices to the spinning industry. The VSF value chain stakeholders also welcomes the fact that the Hon'ble Union Minister and the Ministry of Textiles supports the policy of having availability of raw materials at economical and cheaper prices so that value added products are manufactured and employment is generated at large scale.

The VSF Value Chain Industry players concluded by saying that removing ADD on VSF will make the domestic VSF prices aligned with the Global VSF prices making the entire Indian VSF textile value chain globally competitive and boost production and exports of these products.

CITI HAILS GOVERNMENT'S DECISION TO SET UP EXPORT PROMOTION COUNCIL FOR TECHNICAL TEXTILES

New Delhi, Thursday, 03 December 2020: Confederation of Indian Textile Industry's (CITI) Chairman Shri T. Rajkumar welcomed the decision of the Central Government for the formation of a dedicated Export Promotion Council for Technical Textiles. Shri Rajkumar said, "the Technical Textile is being seen as the sunrise sector of the textile industry and has received significant attention worldwide. With the increasing usage of technical textile products among segments like automobiles, civil engineering and construction, agriculture, medical, shipping, industrial safety, sports and personal protection etc., the technical textile has a bright and promising future in India.

Shri Rajkumar said, "the Government has set up a target of the market size of US\$ 350 billion to be achieved by 2024-25 from the current level of US\$ 167 billion, for the T&C Sector. The said target cannot be only achieved by showing growth in the conventional segments like Cotton and MMF segments. Until and unless, we go for out of box solutions and show tremendous growth in the technical textiles, achieving the market size of US\$ 350 billion looks highly unlikely. Hence, in the present backdrop, the decision of setting up of a dedicated Export Promotion Council is a step in the right direction."

Shri Rajkumar further stated that despite several concerted efforts from the Government, this sector has not gained momentum till now. In February 2020, Cabinet Committee on Economic Affairs (CCEA) chaired by the Hon'ble Prime Minister, Shri Narendra Modi Ji had approved the setting up of a National Technical Textiles Mission (NTM) with a total outlay of Rs.1,480 Crore which will be implemented during 2020-21 to 2023-24. Setting up of a dedicated Export Promotion Council is one of the four components of the NTM which is aimed mainly to achieve a 10% growth rate every year until NTM ends.

CITI Chairman pointed out that "till now, India has been a net importer of technical textile products and the penetration level of technical textiles in India is very low at 5-10%, against 30-70% in advanced countries. The National Technical Textiles Mission aims at improving the penetration level of technical textiles in the country. With the announcement of favourable policies from Government, production and investment in technical textiles in India are picking up slowly and the recent decision of setting up of export promotion council will boost the export as well".

Shri Rajkumar also appreciated the move of the Central Government inviting proposals from Exporter Associations and Trade bodies registered under Companies Act or Society Registration Act for the constitution of a dedicated EPC for Technical Textiles.

CITI Chairman hoped that the above decision will help the Indian textile industry achieve new milestones in the technical textiles as the industry is still at a budding stage with significant growth prospects.

EXPORTS

India's Textile and Apparel Exports (In US Million)

Description	Dec '19	Dec'20	% change	Apr'19- Dec'19	Apr'20- Dec'20	% Change	% share of total Apr'19- Dec'19	% share of total Apr'20- Dec'20
Textiles and Made-ups								
Cotton								
COTTON RAW INCLD. WASTE	169	213	26%	528	1031	95%	2%	6%
COTTON YARN	253	271	7%	1996	1917	-4%	8%	10%
COTTON FABRICS, MADEUPS ETC.	537	625	16%	4537	4174	-8%	17%	22%
	960	1,109	16%	7,062	7,122	1%	27%	38%
Jute								
JUTE, RAW	1	3	211%	11	16	45%	0%	0%
JUTE YARN	2	2	5%	12	10	-15%	0%	0%
JUTE HESSIAN	10	12	24%	81	70	-13%	0%	0%
OTHER JUTE MANUFACTURES	16	17	8%	116	102	-12%	0%	1%
FLOOR CVRNG OF JUTE	6	10	67%	53	63	20%	0%	0%
	35	45	29%	272	262	-4%	1%	1%
Silk								
SILK,RAW	0	0	12847%	0	0	-8%	0%	0%
SILK WASTE	1	2	87%	11	15	43%	0%	0%
NATRL SILK YARN,FABRICS,MADEUP	6	5	-2%	44	45	2%	0%	0%
SILK CARPET	2	2	-18%	17	18	5%	0%	0%
	9	9	3%	71	78	9%	0%	0%
Wool								
WOOL, RAW		0		0	0	28%	0%	0%
WOLLEN YARN,FABRICS,MADEUPSETC	15	12	-22%	140	78	-44%	1%	0%
	15	12	-22%	140	78	-44%	1%	0%
Manmade								
MANMADE STAPLE FIBRE	37	26	-31%	390	261	-33%	1%	1%
MANMADE YARN,FABRICS,MADEUPS	445	381	-15%	3593	2527	-30%	14%	14%
	483	406	-16%	3,983		-100%	15%	0%
Others								
CARPET(EXCL. SILK) HANDMADE	125	154	23%	1041	1033	-1%	4%	6%
COIR AND COIR MANUFACTURES	19	32	63%	228	313	37%	1%	2%
HANDCRFS(EXCL.HANDMADE CRPTS)	150	180	20%	1367	1172	-14%	5%	6%
HANDLOOM PRODUCTS	26	22	-15%	252	155	-39%	1%	1%
OTH TXTL YRN, FBRIC MDUP ARTCL	41	43	5%	368	289	-21%	1%	2%
	361	431	19%	3,256	2,961	-9%	12%	16%
Total Textiles and Made-ups	1,862	2,012	8%	14,784	10,501	-29%	56%	56%
Apparel								
RMG COTTON INCL ACCESSORIES	808	702	-13%	6392	4608	-28%	24%	25%
RMG MANMADE FIBRES	294	230	-22%	2610	1766	-32%	10%	9%
RMG OF OTHR TEXTLE MATRL	289	245	-15%	2223	1690	-24%	8%	9%
RMG SILK	7	11	47%	90	61	-32%	0%	0%
RMG WOOL	10	8	-16%	129	76	-41%	0%	0%
Total Apparel	1,407	1,196	-15%	11,444	8,202	-28%	44%	44%
Grand Total	3,269	3,208	-2%	26,228	18,702	-29%	1	100%

Data Source: CITI Analysis based on DGCI&S data extracted on 03rd February 2021

IMPORTS

India's Textile and Apparel Imports (In US\$ Million)

Description	Dec'19	Dec'20	% change	Apr'19- Dec'19	Apr'20- Dec'20	% Change	% share of total Apr'19- Dec'19	% share of total Apr'20- Dec'20
Textiles and Made-ups								
Cotton								
COTTON RAW INCLD. WASTE	42	30	-28%	1219	258	-79%	18%	4%
COTTON YARN	1	1	35%	15	10	-36%	0%	0%
COTTON FABRICS, MADEUPS ETC.	42	45	8%	437	269	-38%	7%	4%
	85	77	-10%	1,671	537	-68%	25%	14%
Jute								
JUTE, RAW	7	2	-71%	39	23	-41%	1%	0%
JUTE YARN	6	5	-23%	43	35	-18%	1%	1%
JUTE HESSIAN	3	3	9%	24	24	1%	0%	0%
OTHER JUTE MANUFACTURES	9	7	-26%	72	54	-25%	1%	1%
FLOOR CVRNG OF JUTE	0		-100%	1	1	9%	0%	0%
	25	16	-34%	178	137	-23%	3%	3%
Silk								
SILK,RAW	13	9	-27%	124	47	-62%	2%	1%
SILK WASTE	0		-100%	2	0	-79%	0%	0%
NATRL SILK YARN,FABRICS,MADEUP	4	3	-36%	36	15	-58%	1%	0%
SILK CARPET	0	0		0	0	171%	0%	0%
	17.4	12	-28%	161.9	63.0	-61%	2%	2%
Wool								
WOOL, RAW	17	15	-11%	175	96	-45%	3%	1%
WOLLEN YARN,FABRICS,MADEUPSETC	8	7	-10%	85	47	-45%	1%	1%
	25	22		260				
Manmade								
MANMADE STAPLE FIBRE	36	43	21%	381	238	-38%	6%	4%
MANMADE YARN,FABRICS,MADEUPS	178	231	29%	1712	1212	-29%	26%	18%
	214	274	28%	2,094	1,450	-31%	31%	37%
Others								
CARPET(EXCL. SILK) HANDMADE	10	6	-39%	91	48	-47%	1%	1%
COIR AND COIR MANUFACTURES	0	0	-2%	5	1	-73%	0%	0%
HANDCRFS(EXCL.HANDMADE CRPTS)	67	55	-18%	624	449	-28%	9%	7%
HANDLOOM PRODUCTS	1	1	5%	8	4	-57%	0%	0%
OTH TXTL YRN, FBRIC MDUP ARTCL	74	92	25%	678	460	-32%	10%	7%
	152	154	2%	1,407	961	-32%	21%	24%
Total Textiles and Made-ups	518	556	7%	5,771	3,291	-43%	87%	84%
Apparel								
RMG COTTON INCL ACCESSORIES	44	34	-22%	399	234	-41%	6%	4%
RMG MANMADE FIBRES	29	30	5%	291	191	-35%	4%	3%
RMG OF OTHR TEXTLE MATRL	20	20	-2%	189	208	10%	3%	3%
RMG SILK	0	0	-3%	5	2	-63%	0%	0%
RMG WOOL	2	1	-34%	14	10	-29%	0%	0%
Total Apparel	96	86	-10%	898	644	-28%	13%	16%
Grand Total	614	643	5%	6,669	3,935	-41%	100%	100%

Data Source: CITI Analysis based on DGCI&S, As extracted on 03rd February 2020

MONTHLY EXPORT UPDATE ON TEXTILE AND CLOTHING (DECEMBER 2020)

- India's textile and clothing exports were down by **3.83%** from US\$ **3057.82** mn. in December 2019 to US\$ **2940.77** mn. in December 2020. All commodity exports of India were up by **0.14%** in December 2020 over the same month of previous year. Whereas, the share of textile and clothing in India's total exports were down by **0.45%** in December 2020 on YoY basis.
- During December 2020, the exports of T&A following subsectors that have registered positive growth as compared December 2019:
 - Carpets by + **21.17%**
 - Jute Mfg. including Floor Covering by +**21.93%**
 - Handicrafts excl. handmade carpet by +**21.78%**
 - Cotton Yarn/fabric/made-ups, Handloom Products etc by + **10.35%**
 - Apparel by +**6.3%**
- During December 2020, the exports of T&A following subsector have registered negative growth as compared December 2019:
 - Man-made Yarn/fabric/made-ups etc. by **-14.56%**

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

Export category	Dec-19	Dec-20	% Change	Apr'19-Dec'19	Apr'20-Dec'20	% Change
<i>Cotton Yarn/Fabs./made-ups, Handloom Products etc.</i>	894.03	986.53	10.35%	7,542.95	6,789.08	-9.99%
<i>Man-made Yarn/Fabs./made-ups etc.</i>	445.16	380.36	-14.56%	3,592.82	2,521.40	-29.82%
<i>Jute Mfg. including Floor Covering</i>	33.84	41.26	21.93%	261.19	245.10	-6.16%
<i>Carpet</i>	127.28	154.23	21.17%	1,057.71	1,048.22	-0.90%
<i>Handicrafts excl. handmade carpet</i>	150.03	182.71	21.78%	1,367.15	1,172.63	-14.23%
Sub-Total Textiles	1,650.34	1,745.09	5.74%	13,821.82	11,776.43	-14.80%
Apparel	1,407.48	1,195.68	-15.05%	11,444.16	8,199.76	-28.35%
Textile and Clothing	3,057.82	2,940.77	-3.83%	25,265.98	19,976.19	-20.94%
All Commodity	27,107.38	27,145.10	0.14%	2,38,274.32	2,00,801.99	-15.73%
% of T&C in Total Exports	11.28%	10.83%		10.60%	9.95%	

Source: DGCIS&S

QUICK ESTIMATES OF IIP FOR TEXTILE AND CLOTHING SECTOR (T&C): NOVEMBER 2020



Quick Estimates - Index of Industrial Production - Textiles & Clothing

DESCRIPTION	WEIGHTS	INDEX			CUMULATIVE INDEX		
		Nov-19	Nov-20	% Change	Apr'19-Nov'19	Apr'20-Nov'20	% Change
Manufacture of textiles	3.2913	119.7	108.0	-9.8	115.6	78.2	-32.4
Manufacture of wearing apparel	1.3225	139.1	112.9	-18.8	155.2	94.9	-38.9
*Textiles & Clothing	#	#	#	#	#	#	#

Source: *CITI Analysis & Ministry of Statistics Planning & Implementation; # It may not be appropriate to compare the IIP in the post pandemic months with the IIP for months preceding the COVID 19 pandemic

- For the month of **November 2020**, the Quick Estimates of Index of Industrial Production (IIP) with base 2011-12 stands at **126.3**. The Indices of Industrial Production for the Mining, Manufacturing and Electricity sectors for the month of **November 2020** stand at **104.5**, **128.4** and **144.8** respectively.

“Textile Sector Skill Council (TSC) as of now in the financial year 20-21 TSC has certified 59,909 candidates. This was made possible due to active participation of Handloom Societies under RPL Type-1 and various stakeholders under RPL Best in Class Employer. TSC hopes that in the current Financial Year all other regional associations will also participate in PMKVY and other schemes for the benefit of the industry.

TSC has successfully conducted training for 7000 weavers in Kashmir with the active participation of stakeholders.”

TRAINING PARTNER WISE CERTIFICATION DATA

SUMMARY FOR FY 2020-21		TRAINING PROVIDER	STATE	TOTAL CERTIFIED	
PARTICULARS	NUMBER CERTIFIED IN THE OCT - NOV 2020				
No. of Persons Certified	59,909	Abasaheb Parvekar Mahavidyalaya, Yavatmal	Maharashtra	26	MILL SECTOR
Mill Sector:	710	Deepak Spinners	Himachal Pradesh	120	
Fresh:	260	Kallam Spinning Mills Ltd.	Andhra Pradesh	75	
RPL:	450	PEE VEE Textiles Ltd	Maharashtra	146	
Handloom & Powerloom Sector:	59,199	Tamilnadu Spinning Mills Association (TASMA)	Tamil Nadu	304	
Fresh:	1,457	The South India Textile Research Association	Tamil Nadu	39	
No. of Trainers Certified	47	Ajitaaksh Ventures Pvt Ltd	Assam	19,692	HANDLOOM SECTOR
No. of Training Partners (Affiliated)	12	Chanu Creations	Arunachal Pradesh/Uttar Pradesh	1,207	
No. of Assessors Certified	166	Guhan Tex Solutions	Tamil Nadu	3,241	
No. of Assessment Agency Accredited (DGT)	24	IL&FS Skills Development Corporation Ltd	Assam	1,062	
		Institute of Skill & Crafts	Andhra Pradesh	1,107	
		Integrated Research & Resource Dev. Org.	Manipur	3,449	
		Job Hut	Assam	2,031	
		K B Philanthropy	Manipur	4,678	
		East Development Consortium	Assam	3,368	
		Sreeja Educational And Welfare Society	Karnataka/Andhra Pradesh	7,545	
		TBL EDUCATION	Assam	1,101	
		Valeur Fabtex Pvt. Ltd. (Formerly Pawan & Company)	Meghalaya	4,716	

SNAPSHOT OF THE ACTIVITIES



PMKVY RPL Training conducted at Telangana



TOA at Weaver Service Centre Srinagar



PMKVY RPL Training at Kashmir

Textile Sector Skill Council

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More than 1,05,000 weavers have learned new skills and now possess skill certificates

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