

# TEXTILE



CONFEDERATION OF INDIAN TEXTILE INDUSTRY  
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# TIMES

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## 2<sup>nd</sup> GLOBAL TEXTILES CONCLAVE 2021

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

Inauguration by



**Smt. Smriti Zubin Irani**

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

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Friends, the Hon'ble Finance Minister presented the first digital-cum-paperless Central Budget 2021-22 on 1st February 2021, in the history of India. The budget presents the pragmatic view of the Central Government and rest on six pillars -- health and well-being, physical, financial capital and infrastructure, inclusive development for aspirational India, reinvigorating human capital, innovation and R&D and minimum government and maximum governance.

We are extremely thankful to the Hon'ble Prime Minister, Shri Narendra Modi Ji and the Hon'ble Union Minister of Textiles, Smt Smriti Zubin Irani Ji for giving a major thrust to the Textile Sector in the Budget by allocating Rs.3,445 crores under various schemes, including announcing setting up seven Textile Parks in 3 years under the Mega Investment Textile Parks Scheme (MITRA), PLI Scheme for MMF Garments and Technical Textiles amongst others. The Government has also announced rationalization of customs duties on Caprolactam, Nylon Chips, Nylon Fibre & Yarn to 5% and allowing women to work in all categories and also in the nightshifts with adequate protection. However, 10% import duty on Cotton & Cotton Waste has come as a deterrent for the Cotton textile value chain and will certainly affect the cost competitiveness of the industry at the global front.

We have appealed to the Hon'ble Prime Minister, Textiles Minister, Finance Minister, Commerce & Industry Minister and Agriculture Minister to consider the abolition of import duty on Cotton & Cotton Waste and apprised them about the serious implications the downstream value-added segments will have by business loss, foreign exchange loss to the Government exchequer and livelihoods loss to millions who are directly connected with the business through this policy change as India imports only speciality cotton (ELS), contamination free cotton, coloured cotton, organic cotton, etc which is not produced in India and is required to manufacture the value-added textile products for the niche markets like USA, Europe, UK and Japan.

NCTC members recently had an interactive meeting with the Textile Commissioner on TUFs issues concerning the textile and apparel industry. We apprised the Textile Commissioner that there is already a delay of more than 5-6 years in the release of pending subsidies under TUF cases running into crores of rupees and early resolution of these cases will be of a great help for the industry. We also apprised her that TUF Scheme helped the industry a lot in the technology upgradation and modernisation and has so far attracted around Rs.3.26 lakh crores of investments.

The spinning sector in particular has got a major boost under TUF scheme and rose to excellence with subsidy support. However, at present, around 15 million spindles are over 15 years old and need modernization to compete with the major international players. We have requested her to expedite the JIT and make it simple after removing all the complicated procedures and release the subsidy. All the issues concerning JIT were discussed at length and the Textile Commissioner assured that she will look into them and try to resolve whatever possible at the earliest.

CITI has apprised the Hon'ble Union Minister of Textiles that yarn prices which recently skyrocketed in the last couple of months have started cooling off and is just a temporary phase. We also apprised her that NCTC has been taking concerted efforts to stabilize the prices and also appealing to the industry to avoid panic buying as abundant quantities of cotton and yarn are available at disposal of the entire textile value chain. At the same time, we have appealed to the Hon'ble Union Minister of Textiles to ensure stability in CCI cotton prices for at least one month which will help the garment exporters to commit their longer period export orders.



CITI has made an earnest appeal to the Hon'ble Union Minister of Textiles to announce a "Specialty Cotton Development Fund" for CITI-CDRA and SIMA-CDRA for the development of ELS, organic, naturally coloured and speciality cotton under Atmanirbhar programme to achieve self-sufficiency in the value added segment. We have apprised her that India is the largest producer of cotton in the world but lacks in domestic production of Extra Long Staple (ELS), coloured cotton and speciality cotton and resorts to imports for the same to meet the requirements of niche markets such as US, Europe, UK, Japan, etc. India consumes around 60% of the specialty cotton especially American PIMA and Egyptian GIZA and this value-added market has been captured by India after great efforts in the last several years.

Friends, this month, CITI Global Textiles Conclave 2021 (CITI GTC2021) is the buzz word for the textile fraternity, and there is an over whelming response in the registrations for this online global textile conclave. The programme is completely packed with the renowned international textile speakers, experts, industry leaders, policy makers, etc and they will be presenting their papers on the relevant sessions lined up over two days. The enriching deliberations will help the industry unfold many unresolved queries in the minds of the industry players in terms of looking up for new partners, new destinations, sourcing countries, etc. since Covid-19 pandemic has changed a lot at a demographic front and international brands are looking beyond for an alternative to China to create a win-win situation.

We are extremely grateful to Hon'ble Prime Minister of India for sending his goodwill message for the textile & apparel industry and we thank Hon'ble Union Minister of Textiles for kindly consenting our request to inaugurate and deliver the Key Note Address for GTC 2021. I would also like to place on record my special thanks to Ministry of Textile Officials, GTC2021 Organising Committee, Co-Partners ITMF and IAF, Knowledge Partner Gherzi, Moderators, Speakers, Sponsors, Advertisers, Participants and CITI Secretariat for their overwhelming support to make GTC 2021 a grand success. The event now looks well poised to come out as an excellent programme seeing the line-up of excellent speakers and moderators. Till the moment, the magazine was going into printing, we have already got confirmation of over 4000 delegates and it may easily cross 5000 mark! I wish everyone involved in the GTC all the best and look forward to your kind participation for a healthy and enriching discussion and hope that CITI GTC 2021 will be a grand success like the first edition held in 2018.

**T. Rajkumar**

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Confederation of Indian Textile Industry is virtually organizing the 2nd edition of the Global Textile Conclave (GTC) on 24th -25th February 2021. CITI GTC2021 is being organized at such a time when everyone is witnessing a challenging time in the form of the Covid-19 pandemic which has far-reaching implications on mankind and the world economies. The economic landscape at present is completely in contrast to what it used to be in the pre-Covid era. The businesses are undergoing radical changes, and in such a testing time, the textile industry and the government need to come together to chart out the roadmap of growth for the next decade – 2021-30. I believe that the time has come now for the industry to look into the future to understand what it has kept in store to unfold in the coming years. Keeping this in mind, CITI decided to select an apt theme for CITI GTC2021 which is “The India Factor: Transforming Global Textiles & Apparel in 2021-30” which reflects the future roadmap of growth for the textiles and apparel industry.



CITI GTC2021 is going to witness huge participation from renowned international textile experts, industry leaders, innovators, policymakers, thinkers, etc. who will deliberate on the important and relevant aspects of the textiles and apparel industry especially in the aftermath of the Covid-19 pandemic. The two-days long Conclave will also help the textile industry to unfold many queries cropping up in the minds of the industry players in terms of looking up new partners, new markets, new sourcing destinations, etc. Since the Covid-19 pandemic has changed a lot on geographic front, international brands are also looking beyond for an alternative to China to create a win-win situation.

We are immensely thankful to the Hon'ble Prime Minister of India for sending his best wishes to CITI for organising the 2nd edition of CITI GTC2021 and sharing his goodwill message for the textile & apparel industry. We are also extremely thankful to the Hon'ble Union Minister of Textiles and Women & Child Development for kindly agreeing to inaugurate the Conclave. I would also like to thank the officials of the Ministry of Textiles, GTC2021 Organising Committee, Moderators, Speakers, Co-Partners ITMF and IAF, Knowledge Partner Gherzi, Sponsors, Advertisers, Authors who have contributed articles in CITI Textile Times Special Edition, Media, Delegates, and CITI Secretariat for their whole-hearted support to make CITI GTC2021 a grand success. We have received an overwhelming response from across the value chain and participation will easily cross the 5000 mark by the time Conclave begins!

Besides fruitful deliberations and interactions among global T&A peers, the Conclave will also showcase exhibitions and the launch of the special publication featuring exclusive articles of the textile industry players. The Conclave comprises 6 Panel Discussions by the leading industry stalwarts.

**Session 1: Apparel Sourcing Trends in the New Normal:** India's market share in the global trade of textiles & apparel has been stagnant at about 5% level; what are the future outlook for India and its perceived strengths, opportunities, and risks. The Panelists will discuss the impact of Covid-19 and the outlook for recovery from it. What will be the key trends and purchasing criteria apparel sourcing by the US buyers/ brands and policy stance of the new administration on imports, possible FTA's in the offering?

**Session 2 (a): Attracting FDI in Apparel Manufacturing in South Asia:** Textile industry is among the most globalized industries in the world. It's undergoing a paradigm shift with geographical shifts in the industry to emerging countries with competitive factor costs and favourable market access conditions. The Panelists will discuss Trends for FDI in the textile & clothing industry in the Indian sub-continent in the coming 2-3 years and what will be the key criteria for selecting a particular location and role of international buyers in the choice of country. There will be deliberations on the Impact of recent flagship schemes Mega Textile Parks and Production Linked Incentive Scheme in attracting FDI in India.

**Session 2 (b): Advanced Textiles:** Building Blocks for Creating a Technical Textile Ecosystem: Global technical textiles industry is estimated at USD 186 bn and has been growing at over 5% CAGR. The demand for nonwoven has received a boost post-COVID 19. The Indian technical textile industry is valued at USD 18 bn and growing at 13 % CAGR. The Panelists will discuss the growth opportunities for technical textiles in India, major challenges being faced by the technical textile industry. There will also be a discussion on

the important policy initiatives and incentives needed to promote the technical textile industry. The session will be chaired by the Textile Commissioner, Ms. Roop Rashi, IA&AS

**Session 3: Addressing Climate Change in the Fashion Industry:** The Fashion Industry Charter of Climate Action's main vision is to achieve net-zero emissions by 2050. This session will discuss the main actions needed to meet the target of zero-emission and what infrastructure will be needed to feedback waste into the supply chain.

**Session 4 (a): Digitalization in textile manufacturing:** Several disruptive technologies are transforming the textile production chain. Digital printing and finishing, AI, AR, and Digital Twins as well as new chain of custody technologies are having a profound impact across the textile value chain. In this session, there will be a discussion on the Implementation of the chain of custody or traceability solutions in the processing of fibres and textile manufacturing systems, the Role of digital twins for textile machinery, and utilization for the training of supervisors and workers in textile mills and Digitalization of the spinning systems

**Session 4 (b): Impact of emerging trade alignments:** recently two trade pacts; RCEP and CPTPP were in the news. The Panelists will discuss the perceived impact of trade and investment in the textile & clothing industry in Asia from these two trade pacts. What are the key opportunities and risks to the Indian textile industry from the emerging global trade landscape? There will also be a discussion on the Impact of the EU-Vietnam FTA on the investment and trade trends in SE Asia.

**Session 5 (a): Global Fibre Situation:** Global mill consumption of fibres was estimated at 114 million tons in 2019 and projected to reach 118 in 2022. This would however be retarded due to the sharp fall in textile consumption due to the pandemic. Man-made fibres occupy 70% of the mill fibre consumption whereas all-natural fibres occupy the remaining 30%. The Panelists will discuss the evolution of Cotton, Viscose, Polyester, and other man-made fibres. What impact is foreseen in the demand & supply of recycled fibres, especially pre and post-consumer waste. How are you gearing up for the same? The session will further discuss the opportunities and constraints for the MMF value chain in India

**Session 5 (b): New business models in the textiles & fashion industry:** Innovation is the hallmark of the fashion industry. The integration of various disciplines such as digitalization and sustainability on the one hand and functionality of materials, on the other hand, has led to the emergence of new business models. The Panelists will discuss the major 2-3 transformative trends observed in the textile & fashion industry in recent times and if there is an opportunity for manufacturing companies to orient themselves directly towards the end consumer. There will also be a discussion on key success factors for start-ups to survive and grow.

**Session 6: Sourcing Trends in Home Textiles; Advantage India:** The global home textile market at the retail level is estimated at over USD 110 billion over 2/3rd of which consists of the two largest product categories, bed and bath linen. India has established a large home textile industry with companies on a global scale, especially in bed and bath linen. The Panelists will discuss the major market trends that characterize the home textile demand in the coming 2-3 years with any unique reference to the US and European market. What are the future outlook and perceived strengths, opportunities, and risks for India against other competitors? There will also be a discussion on the methods to boost exports of Home textile from India.

I once again thank every person and organisation who have extended whole-hearted support for the success of the 2nd Edition of CITI Global Textiles Conclave 2021. I am sure CITI would be able to organize many more grand events like this in the future which will help the textile industry to reveal its true potential.



सत्यमेव जयते

प्रधान मंत्री  
Prime Minister

### MESSAGE

It is a pleasure to learn about the Global Textile Conclave 2021 organised by the Confederation of Indian Textile Industry (CITI) in collaboration with ITMF, Switzerland and International Apparel Federation (IAF), Netherlands.

Innovation and creativity have been the remarkable aspects of Indian art and culture since the earliest times, amalgamating artistic brilliance with simplicity of thought. India's vibrant textile sector and our hardworking weavers are the representatives of the richness of traditional manufacturing, uniqueness of craft and diversity of design.

Various regions across the country have their own textile traditions as an integral part of their cultural identity. From being among the highest job provider in the country to building trade and cultural relations globally, India's textiles sector has always been full of opportunities.

Our Government has been taking comprehensive measures in an integrated manner focused on creating the right ecosystem, enhancing 'ease of doing business' and capacity-building through skill development. To provide an impetus to the textiles industry, we have implemented a series of measures to upscale physical infrastructure to global standards.

Contribution of the textiles sector is vital towards building an Aatmanirbhar Bharat. Integrating the sector with latest technology is one area where the Government is particularly focussing. The textiles industry must continue to innovate, as well as research extensively to enable it to tap new markets and deepen the niche in diversity, manufacturing and design.

The impact of the COVID-19 pandemic showed how technology can be utilised to strengthen the disruptive resilience of society and transform a challenge into an opportunity. The hardworking textile workers and craftsmen enabled the textile industry to make an invaluable contribution towards meeting the requirements of cost-effective PPE kits within the country.



CITI has been serving the textiles and clothing industry for decades with great commitment, facilitating inclusive growth by generating employment for rural women.

I am sure that this global Conclave will provide a vibrant platform to various national and international stakeholders to share latest technological innovations, best practices and experiences for mutual benefit. The exchange of ideas in this Conclave will create new avenues for collaboration.

Best wishes for all success of Global Textile Conclave 2021.

**(Narendra Modi)**

New Delhi  
फाल्गुन 04, शक संवत् 1942  
23<sup>rd</sup> February, 2021

# Doyen's Message



## MR. SURESH KOTAK

**CHAIRMAN, KOTAK GINNING & PRESSING INDUSTRIES LTD.**

We are gladdened, that this global textile conclave, has blessings, of our beloved Prime Minister Shri Narendraji Modi, as well as guiding and inspiring presence, of Hon'ble Smritiji Irani, our dynamic textile minister, amongst our digital deliberations.

I compliment CITI, for arranging this 2nd Global Textile Conclave. In this conclave, there will be, active deliberations, to take forward, our national textile efforts, which will, strategically carry our nation to greater heights. And, we become a significant supplier of textile and textile goods globally.

India is now, on the threshold, of Textile renaissance and we are on the way, to acquiring a position of Pre Imminence. Thanks, to the empowering policies of our government as well as industries resolute resolve, to move in an integrated sustainable manner.

There has been, a continuous and harmonious, dialogue, between the government and the industry. Textile ministry, has taken into account, all the necessary requirements of the industry. Resultantly our textile eco system has started getting vibrant.

India has been achieving global recognition, as a reliable supplier. The all-pervading, sustainability culture, in the policies, processes and practices of textile India, has been generating confidence to the global consumers. Our textiles and apparels therefore, have started, moving in many countries.

Our textile eco system, has been rapidly absorbing and assimilating, various advances in technology, including, digitalization, as a method and a mode of operations. Our government and our industry leaders, are keen to ingest best technologies. This gives us, a leverage, to become cost effective, competent and competitive.

I, would specially, like to highlight our present fibre endowments, along with the fibre power, that our country has, which can lead us, to tremendous achievements, in development of unique textile goods. In my opinion, no other country, of the world has such fibre matrix as we have.

Today India ranks as the biggest producer, of raw cotton and the second largest producer of manmade fibres. We also have endowments of various other natural fibres which are still not utilized or it remains underutilized. We have good production of jute which can be useful in technical textiles. We also have Bamboo plants capable of being used in many ways including medical textiles.

The tree fibres like Kapok and Akund as well as coconut fibre i.e. coir, etc. and some others are also our rich endowments. The animal fibres wool and silk are also available in India hence we are capable of producing many different types of textile goods.

This richness of fibre matrix, can give us comparative and competitive advantage if we deploy, our fibre resources, innovatively and with, high research intensity. To exemplify - CIRCOT, a government organisation for textile application, has achieved development of Nano cellulosic from cotton linters. This is capable of multiple uses.

It is necessary to strengthen our generational, unique and pivotal endowment of raw cotton, by removing some lacunas and infirmities like contamination and low productivity.

We also need to adduce and develop cotton with some needed parameters like strength, elongation, etc.

We need to develop, our strength in organic cotton which will give us much more advantage to be most acceptable, and achieve unique position as a dependable textile supplier.

Let me record, the excellent work being done by cotton research arm of CITI i.e. CITI – CDRA and we have been able to achieved record yield of 900-1000kg per hectare in Rajasthan and compositional change has been effected by developing extra-long-staple cotton of international standard.

In manmade fibres, though we are second best globally, we still we have to depend on other countries for speciality fibres.

We are yet to develop number of specific fibres which could be useful into technical textiles which our government is very much encouraging.

We must also view the fact that now the world is getting greatly into circular economy, hence we need to look towards our cotton as a regenerative fibre. The moves are afoot to retrieve usable material from garments.

For manmade fibre still we have to go miles for development and reuse of its product has to be developed in the days to come.

It gives me sense of satisfaction, that my dream of India getting into textile prominence is becoming a reality.

I feel thankful that our textile ministry under the guidance of Hon'ble Smritiji Irani and our proactive national policies over all on various aspects of industry, agriculture and trade, shipping, MSME's etc. are very conducive for rise of our nation globally.

# Doyen's Message



## **DR K V SRINIVASAN**

**MD, PREMIER MILLS PRIVATE LTD**

Dear Colleagues in the Textile Industry

I am very happy to note that the 2nd edition of the Global Textiles Conclave '21 is being organized by the Confederation of Indian Textile Industry along with international partners – ITMF & IAF. Leaders from the industry, International buyers and Government institutions are taking part in this conference and the theme is on India being an alternative sourcing destination for textiles.

India has a rich and ancient textile heritage and continues to be a dominant player in the global textile industry. It is one of the largest producers of cotton, has a large manufacturing capacity for yarn, fabric, home textiles, apparels and knitwear, a well trained technical managerial capacity and a skilled workforce. India covers the entire chain of textile manufacturing from raw material to finished garments and therefore is uniquely positioned to become a major textile supplier to the world. The textile industry in India is also focusing on manufacturing sustainable textiles with its emphasis on organic raw material, green energy, and zero discharge.

The Premier Group is also actively involved in India's reach for the global textile market. We are a US\$ 200 million group manufacturing fine cotton yarn, cotton fabric, and home textiles. We manufacture in India and export to over 40 countries worldwide.

We are also focused on sustainable manufacturing.

- a) 100% of our energy consumption is green. We have invested in over 100 MW of wind energy.
  - b) We are carbon neutral.
  - c) Over 70% of the waste produced in our spinning mill is recycled and spun into open end yarns.
  - d) In our finishing mill, 95% of our water consumption is treated and reused.
- I am sure this conclave will be of immense value to all the participants from the industry.

Regards

# Doyen's Message



## **MS. DIPALI GOENKA**

**CEO & JT. MD, WELSPUN INDIA LIMITED**

I am delighted to be present at the eminent Global Textile Conclave and share space with Hon'ble Union Textiles and Women & Child Development Minister, Ms Smriti Irani and distinguished Industry leaders.

Today, the textile industry stands at the cusp of transformation – in the way that the industry employs, operates and delivers. India is strongly positioned to have the major pie with presence of complete value chain from fibre to fashion and abundant availability of input raw material like cotton, silk, viscose. The industry has always brought in opportunities and has put India on the global map since the 3rd century. Textile, today, is the 2nd largest employer in the country and would be a key sector to build an AatmaNirbhar Bharat of the future.

Welspun group is humbled to be part of this journey and putting India on the world map as the global leader in Home Textiles. I am proud to share that today an India home grown brand has the highest market share in the world's largest consumer market of US.

India's strengths have already been defined in madeups, handlooms and natural fibres globally. India is now rapidly emerging as a key global player in technical textiles industry. Today the textile industry with government's support has emerged as 2nd largest PPE maker during pandemic, further boosting opportunities to foray into new business segments and tap the growth potential there too. To support the nation &

community, Welspun India also leveraged its integrated woven and non-woven capabilities to produce health & hygiene products ranging from masks, wipes, disposable linen and coveralls.

Sustainability is now a business imperative. Consumers and Investors are holding companies accountable on Sustainability and ESG. Hence at Welspun we have coined our ESG strategy as “WELOCITY” with Acceleration at its core. It aims to propel the well-being of the environment, well-being of the society, along with well-being of our economic stakeholders with a strong governance bedrock. As leaders in sustainability, we intend to have a larger impact, faster.

When we built the world's largest home textile facility in the arid region of Anjar, Kutch; it had just suffered a devastating earthquake. Today it is a thriving self-sustaining ecosystem & an inspiring example of development employing more than 20,000 people. 100% of our water needs in Anjar are met through recycled waste water so that fresh water remains fully available to the local communities. Welspun products are largely made out of cotton, which is why the sustainability journey begins right from the farmers affiliated to Welspun who are trained to grow BCI and Organic Cotton in Wardha (Maharashtra) and Kutch (Gujarat). Our projects are spread over 350 villages and indirectly impact 75,000 farm workers. 25% of our employees are women and we want to grow this even further. At Welspun, we work with local women to create beautiful handcrafted products by upcycling factory remnants, which are sold globally under the brand name 'Spun'.

The recent announcement of setting up 7 textile parks in next 3 years , in addition to the PLI scheme for technical textiles and manmade fibres, is a very positive step taken by the government and promises to strengthen global leadership of Indian Textiles .The industry acknowledges government's support towards bringing in a transformation and further development to this industry.

With this, I would like to wish Confederation of Indian Textile Industry (CITI), ITMF, IAF and Gherzi all the success for organizing 2nd edition of the Global Textiles Conclave '21 and thank them to once again bringing in both domestic and international industry together through this effort.



# 2<sup>nd</sup> GLOBAL TEXTILES CONCLAVE 2021

(Virtual Event)

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



## PROGRAMME

**Theme: "The India Factor: Transforming Global Textiles & Apparels in 2021-30"**

### Wednesday, 24<sup>th</sup> February 2021

0930-1100(CET)  
1400-1530(IST)  
1630-1800(HKT)

#### Inaugural Session

Welcome Address: Shri T. Rajkumar, Chairman, Confederation of Indian Textile Industry (CITI)

#### Theme Presentation

Reimagining The Global Textile Industry And Opportunities For India: Ing. Mr. Giuseppe Gherzi, Managing Partner, Gherzi Textil Organisation, Zürich

**Goodwill Message of Hon'ble Prime Minister of India, Shri Narendra Modi  
(to be read by Hon'ble Union Minister of Textiles and Women & Child  
Development)**

**Inauguration by: Smt. Smriti Zubin Irani, Hon'ble Union Minister of Textiles and  
Women & Child Development**

Vote of Thanks: Shri Sanjay K. Jain, Chairman-Organizing Committee, CITI GTC2021

Goodwill Messages by Doyens of the Indian Textile Industry

- Mr. Suresh Kotak, Chairman, Kotak Ginning & Pressing Industries Ltd.*
- Dr. K.V. Srinivasan, Managing Director, Premier Mills Pvt. Ltd*
- Ms. Dipali Goenka, CEO & Jt. MD, Welspun India Ltd.*

1105-1150(CET)  
1535-1620(IST)  
1805-1850(HKT)

#### Session #1: Apparel Sourcing Trends In The New Normal

→Moderator: Mr. Robert Antoshak, CEO Textile Projects LLC

- Ms. Julia Hughes, President, United States Fashion Industry Association*
- Ms. Deepika Rana, Chief Customer Officer & President of Supply Chain Solutions, Li &Fung, Hong Kong*
- Mr. Andrew Olah, CEO, Olah Inc*
- Mr. Alex Helander, CEO, ACH LLC*

### Tea Break

1200-1245(CET)  
1630-1715(IST)  
1900-1945(HKT)

#### Session #2 : Attracting FDI In Apparel Manufacturing In South Asia

→Moderator: Mr. Matthijs Crietee,  
Secretary General, International  
Apparel Federation (IAF)

- Mr. Kihak Sung, Chairman & CEO,  
Youngone Corporation*
- Dr. Christian Schindler, Director General,  
ITMF*

#### Session # 2(B): Advanced Textiles: Building Blocks For Creating A Strong Technical Textile Eco System

→Chaired by: Ms. Roop Rashi, IA&AS, Textile Commissioner,  
Ministry of Textiles

→Moderator: Mr. Loek de Vries, Managing Partner, Bombyx  
Capital

- Mr. Hendrik van Delden, Senior Partner, Gherzi Germany*
- Mr. Cherian Thomas, CEO, Welspun Advanced Textiles*
- Mr. Rajiv Sajdeh, Founder & CEO, Indo German Yarn &  
Fibres LLP*



# 2<sup>nd</sup> GLOBAL TEXTILES CONCLAVE 2021

(Virtual Event)

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



CO-PARTNERS



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## PROGRAMME

### Thursday, 25<sup>th</sup> February 2021

0930-1015(CET) 1400-1445(IST) 1630-1715(HKT)	<b>Session # 3 Addressing Climate Change in the Fashion Industry</b> →Moderator: Ms. Priyanka Khanna, International Expansion Manager (South Asia), Fashion for Good <ul style="list-style-type: none"> <li>☐ Mr. Bob Assenberg, Fund Director, Good Fashion Fund</li> <li>☐ Ms. Karla Magruder, President, Accelerating Circularity and CEO, Fabrikology</li> <li>☐ Ms. Mridula Ramesh, Founder, Sundaram Climate Institute</li> <li>☐ Ms. Pernilla Halldin, Public Affairs and Engagement, H&amp;M Group</li> </ul>	
1020-1100(CET) 1450-1530(IST) 1720-1800(HKT)	<b>Session #4 Digitalization In Textile Manufacturing</b> →Moderator: Dr. Yves Gloy, Partner, GherziTextil Org Digital Twins For Textile Manufacturing <ul style="list-style-type: none"> <li>☐ Mr. René Krebs, CEO, Side Effects, Switzerland</li> </ul> Sustainable Chain-Of-Custody Technologies <ul style="list-style-type: none"> <li>☐ Dr. Michela Puddu, CEO, Haelixa, Switzerland</li> </ul> Skill Development in Textile Sector <ul style="list-style-type: none"> <li>☐ Dr. J.V. Rao, CEO, Textile Sector Skill Council</li> </ul> Digitalization in spinning systems <ul style="list-style-type: none"> <li>☐ Mr. Prasanta K. Deka, Head Market India, Rieter India Private Ltd</li> </ul>	<b>Session 4(B) Impact of Emerging Trade Alignments</b> →Moderator: Mr. Navdeep Singh Sodhi, Partner, GherziTextil Org <ul style="list-style-type: none"> <li>☐ Dr. Deborah Elms, Founder &amp; Executive Director, Asian Trade Centre</li> <li>☐ Dr. M Suresh Babu, Professor, Department of Humanities and Social Sciences, Indian Institute of Technology, Chennai</li> <li>☐ Dr. Saikat Sinha Roy, Professor &amp; Coordinator, Centre for Advanced Studies, Principal Scientist, RJ JUECON Project on SEZs and Inequality, Department of Economics, Jadavpur University</li> </ul>
<b>Tea Break</b>		
1215-1300(CET) 1545-1630(IST) 1815-1900(HKT)	<b>Session #5 Global Fiber Situation</b> →Moderator: Dr. Christian Schindler, Director General, ITMF Developments in the Global Fiber Market <ul style="list-style-type: none"> <li>☐ Dr. Kai Hughes, Executive Director, ICAC</li> <li>☐ Mr. Uday Gill, Chief Strategy Officer, IVL Group</li> </ul> Future Sustainable Sourcing <ul style="list-style-type: none"> <li>☐ Mr. Robert Van de Kerkhof, Chief Commercial Officer, Lenzing AG</li> </ul>	<b>Session # 5(B) New Business Models In Textiles &amp; Fashion Industry</b> →Moderator: Mr. Anton Schumann, Partner, Gherzi Germany <ul style="list-style-type: none"> <li>☐ Mr. Edwin Keh, CEO, The Hong Kong Research Institute of Textiles and Apparel (HKRITA)</li> <li>☐ Mr. Sebastiaan van de Loo, Director, Color Digital GmbH, Germany</li> <li>☐ Mr. Gonçalo Cruz, Co-Founder, PlatformE</li> </ul>
1205-1250(CET) 1635-1720(IST) 1905-1950(HKT)	<b>Session # 6 Sourcing of Home Textiles – Advantage India</b> →Moderator: Mr. S.K. Khandelia, Deputy Chairman, CITI <ul style="list-style-type: none"> <li>☐ Mr. Kailash Lalpuria, Executive Director &amp; CEO, Indo Count Industries Ltd.</li> <li>☐ Mr. Calvin Woolley, Global Supplier Development Leader – Textiles Category Area, Inter IKEA Group</li> <li>☐ Mr. Abhishek Kaul, VP of Product Development &amp; Merchandising, Hollander Sleep Products, LLC</li> <li>☐ Mr. Raman Khanna, Head of Category (Home &amp; Hard Goods), John Lewis, India</li> </ul>	
1255-1300(CET) 1725-1730(IST) 1955-2000(HKT)	<b>Closing Session</b> <ul style="list-style-type: none"> <li>☐ Vote of Thanks by Shri R.L. Nolkha, Vice Chairman, CITI</li> </ul>	

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## GOOD DAYS AHEAD FOR INDIAN TEXTILE & APPAREL INDUSTRY



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

**T**he textile and apparel (T&A) industry plays a significant role in the social and economic development of the country. As per the latest economic survey conducted by the Government of India, T&A sector contributed 2 percent to the overall GDP of India and 11 percent in the total manufacturing of Gross Value Added (GVA) during 2019-20. This sector is estimated to provide direct and indirect employment to more than 10 crore people, thus making it the second-largest employment generator in the country, next only to agriculture.

India is the sixth-largest exporter of textiles and apparel products after China, Bangladesh, Vietnam, Germany, and Italy. India is a well-known player in the

global market for its quality products, comprising cotton yarn, fashion garments, Made-ups, hand-made carpets, etc. The designing capability of the industry is respected worldwide, which has helped the country to build its image as one of the largest industrial powerhouses.

Recently, Covid-19 pandemic has severely affected this sector with thousands of mills facing closure due to shortage of finances, labour and raw materials and still struggling to limp back to normalcy. Amid this uncertainty, industry players and entrepreneurs are discovering new and innovative means of operation. Due to the pandemic, businesses and supply chains are witnessing a drastic shift from traditional products to

new ones such as PPEs, N-95/cotton masks, technical textiles, synthetic material, etc.

In the aftermath of Covid-19 crisis, the Hon'ble Prime Minister, Shri Narendra Modi Ji has called upon the citizens of India especially the entrepreneurs to make India 'AtmaNirbhar' (self-reliant) but at the same time not isolating themselves from rest of the world. At this juncture, many countries are now looking towards India as an alternative of China, be it for setting up their manufacturing bases or looking for a new partner for sourcing their end products. It has thrown up a unique opportunity in front of the Indian textile players to tap new investors and buyers despite the fact that India face stiff competition from countries like Bangladesh, Vietnam, Turkey, in eastern Europe, Ethiopia, Mexico, and other Latin American countries due to cheap labour and tariff advantage.

The Government at its level taking every possible steps through various policy reforms, such as, the announcement of new schemes like PLI, boosting infrastructure with the announcement of world-class Integrated Textile Parks under MITRA, and structural policy changes in MMF Sector by removing anti-dumping duty on PTA, Acrylic Fibre and Nylon, rejecting proposed ADD on PSF, MEG and also recommending to address the issues of inverted duty, and slotting the entire cotton textile value chain under 5% GST slab. Industry in collaboration with the Government should also focus on adopting latest manufacturing technologies to increase its scale of production, quality, and timely delivery to increase their cost competitiveness at global front.

With a share of about 60% in the total textile trade, the Indian textile sector primarily focuses on cotton-based textile products. The Cotton has been the mainstay for the Indian T&A industry where it has self-sufficiency in the production of low margin products. To sustain in the present environment where the Indian T&A industry is facing stiff competition from other countries, the industry requires to reform, perform and transform its traditional functioning and outlook. Achieving manufacturing excellence through sustainable development is the way forward for the Indian industry.

The major underlying issues of the textile and apparel industry of India are its unorganized structure and lack of requisite scale of manufacturing. The decentralized power looms and knitting sector forms the largest section of the textile sector. This decentralization has resulted in its inability to reach to its full potential. In the cost-competitive global textiles industry, the Indian textiles sector has to take some

urgent steps to gain an edge over its competitors like China, Bangladesh, Vietnam, etc. It is the right time for the Indian T&A industry to adopt the buzzing term 'Manufacturing Excellence' if it has to aspire to its vision of US\$ 350 bn market size by 2025.

It is now becoming a pre-requisite for every industry to look for innovative ideas and thinking to sustain themselves in this competitive era. With new products, new features and characteristics, the new methods and processes have become the need of the hour to fulfil the ever-changing customer demand. Our industry is no different, in fact, innovative industries are more successful and retain more customers than the industries that are reluctant to embrace these technological advancements. Every day new designs are being launched in the global apparel market which has left no other way than adopting rigorous innovations in design and manufacturing processes. Productivity, resource management, quality management, and environmental issues have become undeniable factors in terms of innovation as doing business is becoming quite expensive. As a result, it is mandatory for industries to research, innovate, identify, adapt and control the appropriate product, process, technology, and market to make the business sustainable and profitable. The Indian textile & apparel industry seems to be emerging from an almost static state in the past and heading towards a path of growth. Since textile and apparel is one of the major industrial sectors in India, the future success of the country's economy largely depends on the innovation capability of textile and apparel industry.

While many new companies are looking to set up their manufacturing base in India, it is also a golden opportunity for the Indian companies to join hands with foreign investors as they are well versed in the field of the latest technology. As per the latest report released by the World Bank, India is ranked at 63rd position among top countries in terms of ease of doing business which is much better than its counterparts like Vietnam and Bangladesh which are placed at 70 and 168 positions, respectively. In addition, India has one of the stable political ecosystems in the world and the presence of a complete value chain makes it a perfect alternative destination.

As per the data released by the Department for Promotion of Industry and Internal Trade (DIPP), during the last twenty years, from April 2000 to March 2020, India's T&A sector has received a cumulative FDI inflow of about US\$ 3,448 million. Mauritius, Cyprus, Canada, Japan, and USA are some of the prominent investors in India's T&A sector. Indian Government is also aware of the advantages that FDI



can bring in the Indian T&A Sector and hence India has designed one of the most liberalized FDI policies among its peer. As per our FDI Policy, 100% FDI is allowed in the textile sector under the automatic route. The rule is most flexible and well in-line with other countries. Under automated route, an international investor can invest without prior approval from the Government and RBI.

Likewise, other factors, trade agreements have equal importance in uplifting the manufacturing sector of any country. Trade agreements provide preferential market access to nations leading to various economic and dynamic benefits ranging from trade creation, market expansion to capital accumulation and productivity improvement. Such market access also leads to increasing participation of developing and less developed countries in the world market.

For textile and apparel products, which are price-sensitive commodities, trade agreements hold significant importance. In search of a low-cost manufacturing base, the textile and apparel manufacturing industry has continued to move from one part of the world to the other. Zero duty access from a country to a major market is an important reason for the relocation of the manufacturing base to that country. Countries such as Bangladesh, Turkey, Cambodia, etc. have successfully developed textile and apparel sectors leveraging their duty-free status to the EU and USA which are the largest consumption bases. On the other hand, India does not have duty free access

to these markets, which gives other competing countries a major competitive advantage over India. Thus, there is a strong need for the Government to take up the issue of FTA with the EU and USA on fast-track mode if it wants the industry to increase its export basket in these destinations. Not only from an export point of view but Government should also take care of imports happening from any country which is hampering the domestic market such as the rising imports of cheap apparels from Bangladesh if left unchecked may cause a big dent in the domestic apparel manufacturers which will result in the loss of employment for millions of people.

Indian Textile and Apparel Industry have a great potential and compete with any nation in the world provided a level playing field is provided with appropriate eco system. The industry is extremely thankful to the Hon'ble Prime Minister of India and the Hon'ble Union Minister of Textiles for extending all possible policy and infrastructure support and guidance to make our sector more sustainable and cost competitive in the international market. It is only due to the Government support Indian Textile industry could withstand during this tough time of covid-19 and was able to convert the crisis into an opportunity and could show the world the capability of the Indian T&A Industry. There is no doubt that the coming years will prove to be a golden time for the Indian T&A industry and with the help of a supportive Government at the centre, India will showcase to the world that this decade belongs to the Indian T&A industry.



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CONCLAVE 2021

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

WEDNESDAY, 24TH & THURSDAY, 25TH FEBRUARY 2021

Conclave Website: <https://citiindia.org/gtc2021/>



## WAY FORWARD FOR INDIAN TEXTILE AND APPAREL INDUSTRY



**Mr. S. K. Khandelia**  
Deputy Chairman, CITI

The Global Textile Conclave, organized by CITI is an attempt to provide a platform to all stake holders in the textile value chain to brainstorm about the potential of Indian textile industry, highlighting its ability to play a much bigger role in the world market in the next decade. I am confident that discussion on all the relevant topics for this conference with distinguished speakers from all over the world will yield positive outcome for our industry.

India must leverage its existing strengths of raw material availability, human capital, entrepreneurship and a rich heritage in textile. Textile industry plays an important role in India's growth, contributing approximately 2 per cent to India's Gross Domestic

Product (GDP), 7 per cent to industrial production, 12 per cent to the country's exports earnings and is the second largest employer after agriculture.

Industry observers believe that recent pandemic induced shifts in sourcing patterns for textiles, have provided India with yet another great opportunity to increase its global market share. India must improve its global competitiveness to make this decade **"India's decade"** in textile value chain.

Collaboration and close partnership between the industry and the government is required to improve India's competitiveness. There are 7 key areas where urgent intervention is required.

### **1. Diversification towards MMF**

Indian textile industry needs to diversify to MMF based products to widen its product offerings and to cater to growing global demand for such products. Such diversification will complement our strength in cotton based products. The industry also needs to move to value added and performance based products. The Government has rolled out incentives and the industry needs to invest in this sector.

### **2. Digitalization and Technology upgradation**

Upgradation of our technology is a key factor of success to meet the demands of digital commerce. The industry still needs to upgrade the downstream value chain i.e., weaving, knitting and finishing. The pandemic has accelerated the process of digitalization and the industry needs to catch up. Our industry must make rapid progress towards adopting Industry 4.0 in textiles.

### **3. Sustainability**

Judicious use of natural resources - land, water and air is crucial to the long-term health of our industry. More needs to be done to reduce our consumption of water and energy to improve our competitiveness and align ourselves to the international buyers' demands. The mill sector has already done a lot in this direction by investing in technology and process improvement, however there is need for government intervention to establish CETP's to support the decentralized processing sector. Sustainability of our planet and its people to be kept in mind by manufacturing units and systems/processes to be adopted to support the concept of circularity through reduce, reuse and recycle. Continuous product and process innovation should be an essential part of all manufacturing units.

### **4. Enabling environment**

For the industry to be competitive, it needs an enabling environment which is conducive for efficient functioning. In particular, we must address the high cost of logistics. According to the World Bank's Logistics Performance Index (LPI), India was ranked # 44, behind its competitors and even a recent study by NCAER highlighted the high cost of domestic logistics, especially by road transport. MSME sector in textiles should be ably supported by the government as it contributes more than 60% to the overall production.

MSME sector needs to be enabled to upgrade their technology, access to finance to enhance capacities.

### **5. Fiscal distortions**

There is an urgent need for the government to address the fiscal policy anomalies. Inverted tariff structure in GST, avoidable anti-dumping duties on certain raw materials, neutralization of embedded taxes on exports across the entire value chain need to be addressed on urgent basis. We should not be exporting our taxes!

### **6. Trade Agreements**

Trade agreements play an important part for the growth of exports in textile value chain. India does not enjoy FTA with 2 of the biggest markets viz EU and USA. India has also decided to opt out of RCEP, which had 15 major textile economies. Industry needs support from the government to expedite the EU FTA. Our major competing nations like Bangladesh, Vietnam, Pakistan enjoy the FTA advantages with major importing nations.

### **7. Focus on Technical Textile**

Technical textile is one of the fastest growing sub-segments in India. With a view to position the country as a global leader in technical textiles, National Technical Textiles Mission was set up in 2020 with a total outlay of ~Rs 1400 crores. PLI (Production Linked Incentive) scheme also stresses on incentivising investment into technical textiles and MMF textiles. Recent pandemic situation showed us our strength in this area as India became one of the largest exporters of masks and PPE within months. This was a good example of the government and industry working together to achieve success and converting a tough situation into a big growth opportunity. There is huge opportunity in domestic market as well as exports of technical textiles products, which must be leveraged.

To conclude, Government and industry collaboration is vital to improve the global competitiveness of the Indian textile & apparel industry. International buyers are eager to diversify their sourcing base. Doubling our world market share to 10% will boost production, exports, and employment.

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# ATTRACTIVENESS OF THE INDIAN COTTON SECTOR



**Mr. R. L. Nolkha**  
Vice Chairman, CITI

Cotton commonly known as “White Gold” is one of the important cash crops in India. Cotton production in India is of significant advantage for generating employment for both skilled and unskilled labor - thus helping to strengthen the country's economy.

Indian cotton textile industry is more than 5000 years old and has presence in the entire value chain (farm to fashion). 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 T&A Industry. The sector is capable of

producing all types and varieties of cotton suitable to spin from 2s to 120s.

Today India is not only the world's largest producer of cotton but also 2nd largest consumer, 3rd largest exporter of cotton, and holds approximately 37% world's area under cotton cultivation. Indian textiles and clothing industry is predominantly cotton based and consumes over 80% of the cotton produced in the country. India being a tropical country, is a huge market for cotton textiles (cotton fibre to MMF fibre consumption ratio is 65:35), whereas the same is reverse globally (70% MMF and 30% cotton).

### Cotton balance Sheet for 2020-21

Particulars	2020-2021 (P) *	
	(In lakh bales of 170 kg. Each)	(in Thousand Tons)
<i>SUPPLY</i>		
<b>Opening Stock</b>	120.95	2056.15
<b>Crop</b>	371.00	6307.00
<b>Import</b>	11.00	187.00
<b>TOTAL SUPPLY</b>	<b>502.95</b>	<b>8,550.15</b>
<i>DEMAND</i>		
<b>Mill Consumption</b>	286.00	4862.00
<b>S.S.I Consumption</b>	26.00	442.00
<b>NonTextile Consumption</b>	18.00	306.00
<b>Export</b>	75.00	1,275.00
<b>TOTAL DEMAND</b>	<b>405.00</b>	<b>6,885.00</b>
<b>Closing Stock.</b>	<b>97.95</b>	<b>1,665.15</b>

*Source: Committee on Cotton Production and Consumption (COCPC), Ministry of Textiles*

As per the estimates of the Committee on Cotton Production and Consumption (COCPC), cotton production of India for season 2020-21 is estimated to be about 371 lakh bales owing to better monsoon and favorable conditions. Closing stock of about 98 lakh bales is projected due to a huge opening balance of 120 lakh bales owing to the loss in demand created due to the Covid-19 pandemic worldwide.

India's cotton sector holds a massive 22% of world spindle capacity and also has the highest number of installed looms in the world. Indian cotton sector has enormous potential and considering this the Ministry of Textiles has set a target of USD 350 Bn total business size during 2025 from the current level of USD 167 Bn. To achieve the vision the capacity requirement is shown in the table below:

Due to the utmost importance of cotton crop in Indian textile sector and thus indirectly in the Indian economy, Government of India is taking every

possible step to boost up this sector. On the occasion of 2nd World Cotton Day, Hon'ble Union Minister of Textiles, Smt Smriti Zubin Irani launched the first-ever Indian brand cotton brand "Kasturi" to help textile manufacturers and exporters get better price realization for the products in the international markets. The Kasturi Cotton brand represents parameters like whiteness, brightness, softness, purity, luster, uniqueness, and Indianness. It would enable the Indian cotton value chain to improve quality and emerge as one of the best in the world.

Cotton has been the pride and prime of the Indian Textile Industry. Being the king of all fibres and eco-friendly, the Indian Government has been encouraging utilization of cotton through various schemes such as Technology mission on cotton, Minimum Support Price (MSP), Export benefits, etc.

The cotton sector (agriculture, ginning/pressing, and trade) alone has been the mainstay for not only the 60

### Government Vision 2025 for Indian Textile & Apparel Industry

S. No.	Sector	Machinery Requirement
1.	Spinning	50 Million Spindles
2.	Weaving	5 lakh shuttleless looms
3.	Knitting	50,000 M/cs
4.	Processing	2000 units with one lakh metres/day each and 1000 units with 5 tons/day knits/yarns /fibres
5.	Garment	50 Lakh m/cs

lakh poor cotton farmers, but also to the value-added textile industry which employs directly & indirectly more than 10 crore people (making it the largest industrial employer).

The government of India is actively working to increase the market size and share of India in the global textile & apparel market. With a blend of favorable business policies and support from the Government, the Ministry of Textiles has set a target of US\$ 350 bn for the Indian T&A market. India stands at 63rd rank in ease of doing business ranking which is much better than other competing nations like Bangladesh and Vietnam. With a stable and supportive Government at the centre, India is much likely to improve its rank further in the future and will emerge as one of the favourable destinations for overseas investment. Indian T&A industry is also looking for favorable business partners who can invest here and share their technical know-how, something which India lacks. With the ongoing Covid-19 crisis, there is a strong sentiment against China in the business world and many companies are willing to move out of China and are looking for alternate destinations for their business partners. India holds immense potential and capabilities to present itself as the alternative to China. Following are the advantages of India which it offers to foreign investors:

1. Abundant availability of raw materials
2. Presence of complete value chain
3. Competitive cost of manufacturing
4. Availability of readymade infrastructure
5. Availability of a large pool of skilled & English-speaking manpower
6. Large and growing domestic market
7. Government support through various schemes
8. Preferential access in specific markets
9. Presence of large integrated textile players
10. Social, Political and Economic stability

The quantum of support package given by the Government and RBI during the Covid-19 crisis shows that the Industry is ready to take up any challenges to safeguard its economy and industrial sector. Moreover, the announcement made in the recent budget presented by the Hon'ble Union Finance Minister Smt. Nirmala Sitharaman, signifies the

commitment of the Government for improving its industrial sector. The announcement of setting up 7 world-class textile parks with state-of-the-art infrastructure, common utilities, and Research and Development (R&D) lab, within the next 3 years under the Mega Integrated Textile Region and Apparel (MITRA) scheme will prove to be a game-changer for the Indian textile industry and will give Indian manufacturers a level-playing field in the international textiles market & pave the way for India to become a global champion of textiles exports.

The steady government facilitates a secured environment for the global companies to establish their base in India that is in contrast to other emerging textile bases like Bangladesh, Pakistan, and Ethiopia, etc. which are marred by political and social instability. The Indian government has made focused efforts in improving economic systems to attract foreign investors, enhance international trade, and increase transparency. As far as Foreign Direct investments (FDI) is considered, India has one of the most liberalized FDI policy in the world. India has allowed 100% FDI in the textile & apparel sector through automated routes thus opening gates for foreign investors to invest in India. In the Post-COVID scenario, several countries like Japan are eyeing India, to make investments and this enables a huge opportunity to attract FDI.

Govt. of India is taking all the possible efforts for the betterment of the Indian textile & apparel sector. The government has laid down red carpet for the foreign investor to come, invest and make in India. Amid the Covid-19 crisis, while the T&A industry of other competing countries was struggling for its survival, on the other hand, the Indian T&A industry under the dynamic leadership of Hon'ble Union Minister of Textiles worked hard to convert the crisis into opportunity and showed the world that Indian industry has all the capabilities to do wonder even during the tough and challenging time. The future for the Indian textiles industry looks promising, buoyed by strong domestic consumption as well as export demand. With consumerism and disposable income on the rise, the retail sector has experienced rapid growth in the past decade, and considering all other factors as well it is the right time for investors to come and invest in Cotton Textiles in India.



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## IT'S NOW OR NEVER! THE INDIAN TEXTILE & CLOTHING INDUSTRY AT AN IMPORTANT THRESHOLD



**Mr. Sanjay K. Jain**

Chairman, CITI GTC2021 Organizing Committee and  
Past Chairman, CITI

Indian Textile Industry is at a very important threshold from where it can move to a higher orbit of growth. It is well poised to create a much stronger footprint across the globe and more importantly meet the country's inclusive growth objective by providing employment to the masses, especially illiterate rural women. China which has major share 37% of the global textile trade is in the process of vacating some space due to its high cost structure and increasing labour wages, and at the moment, there is no one better placed than India to capture the opportunity we have missed in the past!

Indian Textile Industry is a story of misses and promises. Since last 2 decades, India has been threatening and boasting of to become a Super-power in Textiles, however, China, Bangladesh and Vietnam overtook us and occupied the space vacated by the developed countries! There is no doubt that we have 11% export share, 2% GDP share and employ roughly 45 million people directly but it is still much below the

true potential Indian textile industry holds due to its inherent strengths.

Earlier, there was a lot of hope from the Indian Textile Industry within and outside India after we liberalised ourselves in the early 90s and we learned to live without protection. However, we continued to grow at the Hindu rate of growth and saw the rest of Asia especially China overtook us. Now, even the Vietnam and Bangladesh have also surpassed us, and we are still struggling to correct ourselves in terms of technology, infrastructure and policy support. This is despite having all the required ingredients, we couldn't get our recipe correct.

We have had everything in place - most of the raw materials (BT Cotton revolution, PSF/VSF capacities), competitive labour, domestic market, MFA phase out, reasonable financing (due to Govt TUF Policy) however, we still could not build a robust industry to capture a substantial share of the global textile market except for cotton yarn segment in the last 2 decades.

The saga still continues and unless we realise our folly and take some decisive actions, we will again miss the bus and this time for ever! It's a well-known fact that the textile industry thrives at a range in the development curve where the economy moves from being an under-developed nation to a developing one. The decline starts once the journey of being a developed nation starts. USA, Europe, Japan are examples and now China is in the same position. China has 35% of the global textile market and has slowly started vacating that space – this has again given India a huge opportunity to pick up the loose threads and web a strong textile industry. India is best poised to take advantage of the situation hence we are at a very important threshold – it's now or never situation for the Indian textile industry.

Fortunately, the present Government and Industry stakeholders both have realised the mistakes done in the past, and more pragmatic policies are being made to create the platform for industry to grow on. The recent garment policy announced was one of the best designed policy and we hope that the awaited Textile Policy will be a comprehensive one and lay the strong foundation for the industry to grow at a pace of 8-10% in the coming decade. The appointment of a Cabinet Rank Minister also reflects the seriousness of the Government.

We also need to understand and leverage upon our competitive advantages – the availability of fibre (most importantly cotton but need to stop ignoring other fibres), huge labour force, reasonable rate of finance due to capital/ interest subsidies and the growing domestic purchasing power.

The key areas to be addressed are:

- Balanced fibre policy
- Skilling of labour
- Adoption of best practises by the large unorganised segment of the industry
- Pragmatic and relevant Labour Policies to create a win-win situation for both
- Targetting product lines with high share in global trade esp. MMF based
- Special emphasis to MMF based segment, for high trajectory growth
- Signing of strategic FTAs on an urgent basis (as competition enjoys huge advantage on this count)

These few and not so difficult steps can create a launch pad for increasing our global market share to 10% and by 2030 making us a USD 600 billion industry from a USD 167 billion (domestic plus exports) today. It will also provide an additional employment to 50 million (70% women). The industry would also see major changes in fibre usage (non-cotton fibre share would increase), technology (functional specific textiles would grow in a big way) and technical textiles usage (share of non-apparel usage would grow).

500% growth in 15 years may sound a bit unrealistic as of now, but I strongly feel that this is a well achievable target and if the momentum picks up, we could see this figure being surpassed. The Industry isn't asking for too much, just a few things and then the rest can be left to it. Amongst other things, the coming decade in India will also be known as the **Textile Decade**.

The global outbreak of COVID-19 pandemic has created havoc in the industry. However, there are some key changes that can be foreseen as an aftermath of this and the industry shaping itself accordingly. The black swan event has affected the Indian Textile & Apparel Industry, in terms of both International Trade and Domestic Consumption. With the steep reduction in demand, the industry is likely to face unprecedented and severe losses. Brands are following the strategy of diversification and reduce their dependency on China to prevent any such situation in the future. India is at an advantageous position to utilise this opportunity and present itself as a credible alternate to increase its textile and apparel exports share.

I have been prompted to look beyond 2030 and a crystal gaze to 2050, which I feel is just guessing, but am certain that textile industry would still continue to be a prominent industry supported by technology advancements, large population and strong increase in per capita income. However, the real growth may slow down to 4 to 5%.

One last word, I personally feel that the Industry should be part of Policy Making Body as who knows the industry better than those practising it. Further, Policy needs to be based on realities and needs, rather than lobbying. Industry needs a stable policy framework to work within checks and balances built upfront for different scenarios leaving very little room for abrupt changes which harms the general interest of the textile industry.



# INNOVATIVE STRATEGIC RELOOK AT MULTIPLE FIBRES **PIVOTAL** TO CREATE AND SEIZE OPPORTUNITIES IN TEXTILES.



**Mr. Suresh Kotak**  
Chairman, Kotak Ginning & Pressing Industries Ltd.

**T**he conference on reimagining the Global Textile Industry and the opportunities for India is timely and also critical. It is also imperative for us to assess and think in this direction right away. We must get into the state of sufficient and efficient desire for excellence and get our rightful place in the global participation prominently.

The government has rightly initiated multi measures from all directions to enable and empower this industry to come up to global standards and become a vital part of International textile chain with pre dominance.

The aim is to become alternative supplier to cater to the global requirements in terms of reach out, capacity building and meeting global competition in textiles.

Various measures are in the direction of positive initiations and encouragement - technological upgradation, infrastructure scaling, adding and improvisations. It also addresses the skill deficiencies and emerging environmental cautions, sustainable requirements and adaptation to emerging world after Corona pandemic.

The emerging geo political and environmental requirements have been also conducive for changing the dynamics of Indian Textile Industry.

Very aptly and appropriately the textile community and the government are thinking harmoniously to give total uplift to the textile industry and make it viable and acquire a significant supplier role of textiles in the global context. The new textile policy is also in the wings.

## **Production Link Incentivization (PLI) Augments Efficient Diversified Textile Products**

We have now significant encouragements in various government schemes along with PLI i.e. Production Linked Incentivization. This is cardinal scheme.

One of the most important considerations which is being contemplated is Focused Product Incentive Scheme (under PLI). This would lead to product diversification which is a sine – qua – non to MAP and MATCH the global product requirements. Global product requirements are highly diversified and specific.

This step could revolutionize our total textile scenario and will make our textile industry SAMARTH and SAKSHAM to meet the global challenges.

The production oriented incentive approach of government is directionally correct.

I believe that efficient supply which gets clearly into diversification of the products in terms with HS Codes deliberations with study of different products globally traded could be immensely transformational.

I am also reminded by my relook at economists JB Say's law "Supply Creates Demand". This reinforces my view that strengthening supply chain is imperative, keeping in view the demand axis. These measures will address itself to the buyers requirements also.

The enhanced production capabilities will satisfy the global requirements. The result for India will be --- that which is being sourced just now only from one country will be alternatively sourced from India also.

My endeavoured niched study in following paragraphs is more oriented towards the Fibre Profile of India in above context. The fibres strength is pivotal for the resurgence, reform and reboot of our textile industry. We have to also introspect about our fibre endowments which can really give us very fundamental strength to come up to greater and greater heights.

I need not emphasize but the raw materials are very foundational of any industry, not only textiles.

### **Rich Fibre Endowments of India**

The strength of multi fibres that we have today needs optimization and research orientation will enable India to come up with the grips and lead the way to become an alternative textile supplier to world markets.



In India's case we have many strong points about our fibre endowments. You need to appreciate that our good fibre endowments are PIVOTAL and FOREMOST for achieving dynamism in textile industry.

In the following paragraphs I would like to invoke some thoughts on our Fibres Endowments and how to invoke an internal rise these strength as growth proponents.

### **Cotton**

Today, India ranks as the biggest producer of Cotton in the world. It also has the highest acreage devoted to cotton production but still it has to import certain extra length staple cotton as well as certain extra strength cotton and contamination free cotton regularly. We need to address our self to remove this lacuna as well as other persisting lacunas.

We need to ingest our strength of this biggest and precious most raw material endowment – raw cotton.

Cotton is not only of civilizational or social value but also has immense economic value which is unrealised and not operationalized.

It has been researched by Techno Economic Researchers that Cotton has great potential power to resurgence our national eco system Metamorphically.

Cotton is a multi-component produce and it has elongated utilizable supply chain. This chain extends backward and forward. The economics of this value chain is still underutilized or not sufficiently unfolded.

The cotton essentially is a bi-component product. The cotton comes in an unginning form having 2/3rd in form of cotton seed and 1/3rd of raw cotton fibre. Thus, it is a forward and backward supply chain – one of cotton i.e. 33% and 67% of oil bearing cotton seeds. A Cotton seed is a huge oil economy and it enriches cotton eco system. The total cotton seed production averages 10million tonnes of cotton seeds.

We need to appreciate work of CIRCOT in this connection. CIRCOT, is a government organisation established in 1926 and has been relentlessly working in the direction of cotton and other fibre applications in different ways and increase fibre efficiency in applications.it researches in the technology aspects with a view to develop, innovate fibre applications.

CIRCOT works for different blends of fibres with cotton and thus developed wide spectrum fibre uses in association with Cotton.

CIRCOT has many new innovated textile products for differing textile applications which can kick start many many new textile goods unit, uniqueness of which can give us primacy in international; area.

I recommend everybody concerned with fibre and textiles to become familiar with CIRCOT and benefit. Even cotton residues, plant residues like Stalks have multiple uses as researched by CIRCOT.

The residues in cotton chain like linters or seeds are highly utilizable and can create enormous wealth and value. The latest research is Nano Cellulosic Material of high technical multiple applications out of cotton residues.

There is also an attempt by CIRCOT to develop naturally coloured cotton.

I am connected with ISCI (Indian Society for Cotton Improvement) and Indian Fibre Society where retired and active scientists of CIRCOT and other fibre institutions work together with industry and farmers to create conditions and cultural promotion for our fibre endowments.

### **Other Natural Fibres**

India has endowment in various other natural fibres such as Bamboo Fibre, Fruit Fibres from Banana and Pineapple. Tree Fibres, like Kapok and Ankund and coconut fibres like Coir and some others. We also have animal fibres like Wool and Silk. Bast Fibres like Jute, etc. kindly refer to the total fibre chart given at the end of fibre discussion to appreciate the rich over all fibre endowments in India with primacy of cotton.

All these natural fibres are documented by FAO in a global meeting in 2009, where I attended as Indian Representative and presented our heritage of different fibres. WE NEED TO UTILIZE ALL THIS and develop very competitive applications in development of innovative textile products.

### **Cellulosic Manmade Fibres.**

We have pulpy woods which give us cellulose and we are producing rayon fibres out of that. The ongoing developments are that we can utilize natural residues of Cotton, reutilization of textile fabrics (Lenzing has already done).

### **Mineral Fibres**

The most important mineral fibre which is derived from Hydrocarbons is well known Polyester and other associative fibres like Nylon, Poly ethane Acrylic and so on. There is a huge development in this and it has captured as a principal fibre globally.

INDIA IS THE SECOND LARGEST PRODUCER OF MANMADE FIBRES with world class organisation like Reliance and Indo Rama, we produce good amount of Polyester Fibre. WE ARE QUITE ADVANCED IN THIS AREA of manmade fibre production we still need to develop many speciality manmade fibre for our technical textiles and industrial applications.

This area of fibre is also our present Strength to give diversified products and production.

With all the advantages of having one of the largest base of fibre availability of different kinds, its applications in terms of blend and product innovations and its proper utilization is to be addressed without any delay or hesitancy.

We can augment our diversified resource advantage rapidly. The resource advantage that we have, no other country has.

### **Refocus on Cotton as High Priority - Significant most – pivotal material for our textile economics.**

With all this I recommend to enhance, use and utilization of Cotton as pivotal fibre which has versatile uses and untapped applications. We need to research and innovate in this area by use of genomics and other instruments of bio technology, etc.



It is lamentable that our cotton endowment has still not been taken full advantage of utilization and applications.

Indian cotton has the largest area under a single crop. It has a great propensity to raise its productivity from 500 to minimum 2000kg per hectare. Actually the highest productivity has been achieved upto 2000kg in Brazil, about 1200kg in China and in Pakistan hovers around 900kgs.

India also has a great advantage in having all the variety Cotton of different counts but still we suffer on account of contamination, adulteration and lower parameters as compared to global cotton for same count, etc. these lacunas should be removed in the right earnest.

The cotton as a fibre is always open to greatest degree of achievement and the organic cottons can support bio diversity and biological cycles

### **Organic Cotton**

India can lead in the organic cotton. Today we are producing 59470 metric ton i.e. 51% of global production, china with 22521MT which is 19%, Kirgizstan with 8019MT which is 6.8%, Turkey 7741MT which is 6.6%, Tajikistan with 6405MT which is 5.4%, USA with 4%, Tanzania with 3%.

Organic farming in India is certified under the NPOP i.e. National Program for Organic Production. There are 200 producer goods in 8 states. The total area under organic cultivation is 1,72,180 hectare.

Let us realise that cotton has much greater economics than presently seen. It is not only a fibre crop but also an oil producing crop. And each part of cotton is commercially usable with great utility and applications.

What an enormous amount of textile opportunities we can create out of cotton – our richest fibre endowment, we still have to visualise comprehensively, directionally and strategically.

## Conclusion

The last world trade organisation's economic conference in Davos in 2018 has defined the coming times of economic change as setting of fourth industrial revolution.

We have to realise that we have entered the era of circular economy (reference Davos 2018 McKenzie) the sustainability and regenerative abilities of natural fibres will play a great part and due to environment demand is more of organic natural fibres. Here cotton is already well entrenched in fabric of Indian economy can play pivotal dominant role.

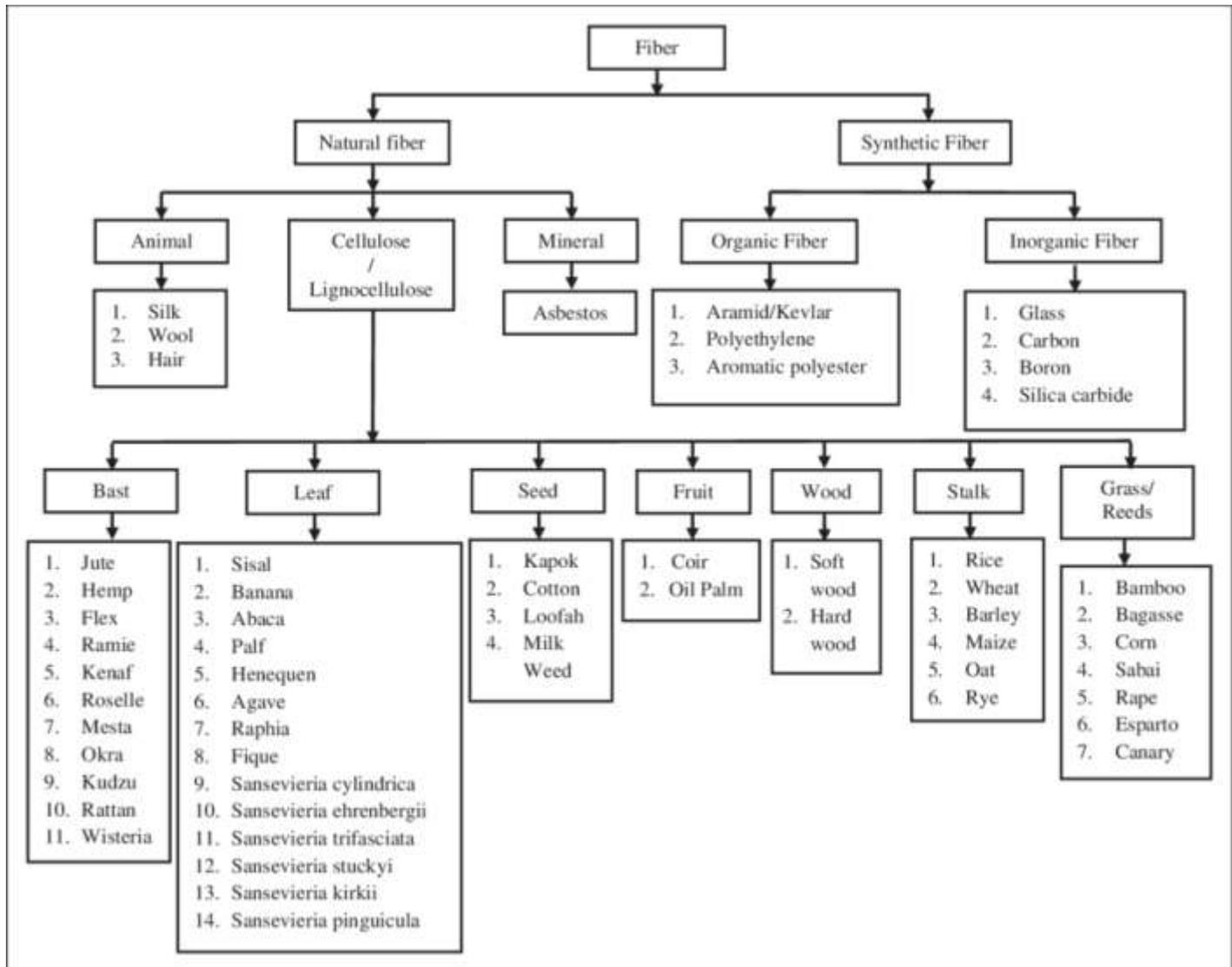
We need to appreciate that the fibres of synthetic origin requires enormous level of energy and are manufactured by different processes producing varying levels of greenhouse gas omission.

The global consumers are increasingly becoming concerned about the environmental impact on their lifestyle and consumption pattern and are willing to pay premium for textiles of organic material.

It has been recommended that carbon based products obtained by synthesising chemical or petroleum products needs to be discouraged and go for more of reuse of that material.

However, we should still utilize all the fibres judiciously, aptly and with discriminations and lead the spectrum of fibre availability to invigorate our new era for radicalization of our textile power.

Jai Hind



**KGP** A division of



Group Established in the Business since 1927



## **Physical Trading and Services Division**

---

- ✓ Raw Cotton
- ✓ Cotton Waste
- ✓ Cotton linters
- ✓ Man Made Fibers
- ✓ Cotton Yarn
- ✓ Blended Yarn
- ✓ Texturized Filament Yarn
- ✓ Polyester Chips
- ✓ Fabrics
- ✓ Made-ups and Home Textiles

### **Kotak Commodity Services Pvt.Ltd.**

B-70, 1st Floor, Cotton Exchange Building, Cotton Green Mumbai - 33  
Website: [www.kotakcommodities.com](http://www.kotakcommodities.com) | Telephone No: +91-22-23739521



# SMART SOLUTIONS SCRIPTING SUCCESS IN SPINNING INDUSTRY



India with 52 million spindles is the second largest yarn producer in the world. The fortunes of the Indian Spinning Industry are cyclical and generally faces the following major challenges that impact the global competitiveness,

- ✓ Profitability
- ✓ High volatility in raw material cost
- ✓ Human resource availability
- ✓ Changing consumer preferences demanding continuous product innovations
- ✓ Sustainability

On examining the average age of spinning machinery in India, it is observed to be in the range of 10-15 years, and this is significantly longer than the usage of machines in other leading countries. Therefore, replacing obsolete machinery and outdated technology is the need of hour for the Indian spinning industry to continue to be a leader and to cater the needs of the downstream industries in the global arena.

Product Innovation	Automation	Digitization	Sustainability
<ul style="list-style-type: none"><li>• Higher productivity</li><li>• Better quality</li><li>• Improved utilization</li><li>• Flexible to process different material</li></ul>	<ul style="list-style-type: none"><li>• Increased productivity</li><li>• Labour saving</li><li>• Requirement of skilled labour addressed</li></ul>	<ul style="list-style-type: none"><li>• Instant and reliable data</li><li>• Smart factory - Manage remotely</li><li>• Effective Material tracking</li></ul>	<ul style="list-style-type: none"><li>• Optimum usage and saving in raw material cost</li><li>• Value added products</li><li>• Lesser power consumption</li></ul>

Lakshmi Machine Works Limited (LMW) has been focusing its efforts to take the Indian spinning industry forward, on a modernization journey. Over the years, LMW has been constantly designing and delivering its line of products focused on product innovation, automation, digitization and sustainability to address the key challenges.

### Product Innovation & Sustainability for Improving Profitability

For better profit margin the spinners have to overcome challenges like high volatility in raw material & yarn price and the rise in labour cost particularly during the period of weak demands, it poses a great challenge as mills cannot pass on this increase in cost of production.

The constant challenge on profitability can also be overcome by focusing on Modernizing with new technology machines and capitalizing new opportunities as well. A judicious investment decision on investing in capital goods to be made to get maximum yarn realization and lower running costs which will help spinners to get the required profit.



The flexibility in ring spinning machines to produce regular and value-added yarns like compact, slub, multi count, multi twist, SIRO, Injection yarns, etc add an edge for spinners to meet this challenge effectively.

The compact yarn demand has increased multi fold in recent years. It supports high speed weaving and knitting and also improves the economics of all such downstream processes. Hence Compact yarn is being considered as the basic requirement in all downstream

processes and also makes the yarn as premium with all these benefits. By investing in compact the spinners can gain the following benefits,

- ✓ Quality improvement - Increase in profit margin
- ✓ Waste optimization - Raw material saving
- ✓ Increased productivity with available resources

### Automation

Though India's labour resources rank second in the world, the availability of skilled work force is still a major challenge. The widening gap between industry requirements and skill levels of available workforce is expected to increase in the coming years. The cost and effectiveness of training and retaining of existing workforce continues to be a major challenge for the Indian spinning industry. In this context, LMW views automation as an enabler. LMW has been working to reduce manpower needs in the spinning industry by rolling out innovative solutions such as the Auto blend, bigger cans for card and drawframes, lap and roving transportation systems, auto doffer speedframe, spindle monitoring systems and Auto piecing in Ringframe.

### Digitization

Remote diagnostic and Artificial Intelligence have started determining the market. Adapting these concepts have become inevitable for manufacturers and LMW has the utmost responsibility in integrating these concepts with our machine systems. These challenges could all be met via automation and IoT concepts, which in turn are the main focus areas of LMW.





***Auto Blend - Blowroom Automatic  
Mixing of different material***



***Card with Inbuilt Drafting System (CDS)  
for Air Jet and Open End process***



***Lap Transportation System (LTS) Automatic  
transfer of spools from Lap Former to Comber***



***Automatic Roving Transportation System  
(RTS) to Ringframes***



***Auto Doffer Speed Frame LF4280/SX***



***Spinpact***  
Suction Compact System



***Smart Ring frame LR9SX/SXL Series***

***RAP  
(Ringframe  
Auto Piecing)***



The comprehensive modules in Spin Connect simplifies the entire spinning process by completely eliminating guess work at all the levels, and empowering the management with the right data and analysis to execute technical and business decisions.

The Spin Connect monitors and supports routine production and maintenance activities. The platform's data analytic capabilities creates actionable intelligence, such as,

- ✓ Monitoring real-time energy consumption
- ✓ Mapping it with historical data to gain valuable insights.
- ✓ Bale Management System
- ✓ Machine health monitoring modules
- ✓ Maintenance management system

With the adaption of above modern changes, the Indian spinning industry is sure to overcome the major challenges and will reach to newer heights.

#### **CII - The Most innovative Company of the Year Award 2020**

LMW has been awarded with “The Most Innovative Company of The Year 2020”, by Confederation of

Indian Industry (CII). The award is for the most innovative Indian enterprise across industry segments and sectors. The award was for the innovative products namely, FixFil, Lap former LH20S and Speed frame LF4280 SX. This Prestigious award serves as an important recognition for LMW's consistent innovative efforts aimed at bringing the latest in textile spinning technology to its customers.



## **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**

**6<sup>th</sup> Floor, Narain Manzil, 23, Barakhamba Road, New Delhi-110 001**

**Phone: +91-11-23325012, 23325013, 23325015, 23325055**

**Mobile: +91-9013386941, Fax: +91-11-41519602**

**Email: manoj@citiindia.org, mail@citiindia.org; Website: www.citiindia.org**



# RING AND ROTOR SPINNING OF RECYCLED FIBERS

## THE INCREASING IMPORTANCE OF RECYCLED FIBER PROCESSING

**RIETER**

With barely 1% of garments being recycled and three quarters of the world's clothing ending up in landfill, the textile industry is actively seeking ways to make production patterns more sustainable and pay more attention to the entire life cycle of items of clothing. Rieter is offering solutions for the integration of recycled raw material into yarn production to help close the textile loop. The results of our latest study show that it is possible to spin not only rotor, but also ring yarns of different quality with a considerable amount of recycled raw material on a Rieter system.

In recent years, better use of raw materials has become very important in the textile sector due to growing environmental awareness, legal requirements for more sustainability, and the cost of raw materials. As a result, more research and development is being carried out in the various areas of textile recycling.

Coordination and cooperation between the different industrial sectors, from the procurement of raw materials through to the new final product, will be vital. Only then will it be possible to expand and optimize the entire recycling process to help it grow into a larger market. In the next few years, the realistic market potential for the staple fiber industry for recycled raw materials amounts to around 7.6 million tons annually if the current trend continues.

### Classify the raw material

To help spinners in the area of recycled fibers, Rieter has established a classification system for the typical recycled raw material quality available on the market (Fig. 1). The Rieter Recycling Classification makes it easier for spinners to estimate what targets can be reached depending on the material. The short-fiber content, the mean fiber length and the 5% fiber length are important parameters after the tearing process because they help to determine which subsequent spinning process (ring or rotor) should be used and which quality (uniformity) and maximum spinning fineness (yarn count) can be achieved.

## Is it economical to produce yarn from recycled fibers?

The economic efficiency depends on the proportion of recycled material in the yarn, as this has an influence on the yarn conversion costs and the yarn sale price. In the Rieter trial a yarn count between Ne 12 and Ne 20 was used and the yarn conversion costs were calculated for ring yarns and rotor yarns in Turkey (Fig. 5).

The economic analysis assumes a slightly cheaper recycled raw material price compared to a medium-quality virgin cotton. The calculation is also based on the realistic view that trade will accept a higher price for yarn made of recycled fibers. Depending on the amount of recycled fibers there is little loss of yarn or fabric quality, but raw material resources are better

utilized and meet the need of many companies to become more sustainable. A blend containing 25 to 50% recycled raw material should therefore achieve a yarn sales price which is at least 0.1 to 0.2 cents per kg higher than that of virgin cotton raw material, depending on the end-spinning process and yarn count. Graphic 5 shows that the Return on Investment (ROI) is best for blends containing 25% to 50% recycled material.

There will be greater or lesser scope for the economic viability of the staple-fiber yarn production process depending on whether it is a case of yarn trading or a fully integrated process. In any case, the economic analysis shows interesting opportunities for processing recycled cotton raw materials using staple-fiber yarn production.

### Return on Investment in Turkey

Virgin CO 29.7mm, 4.1 Mic/Tear fibers CO, ae 4.7

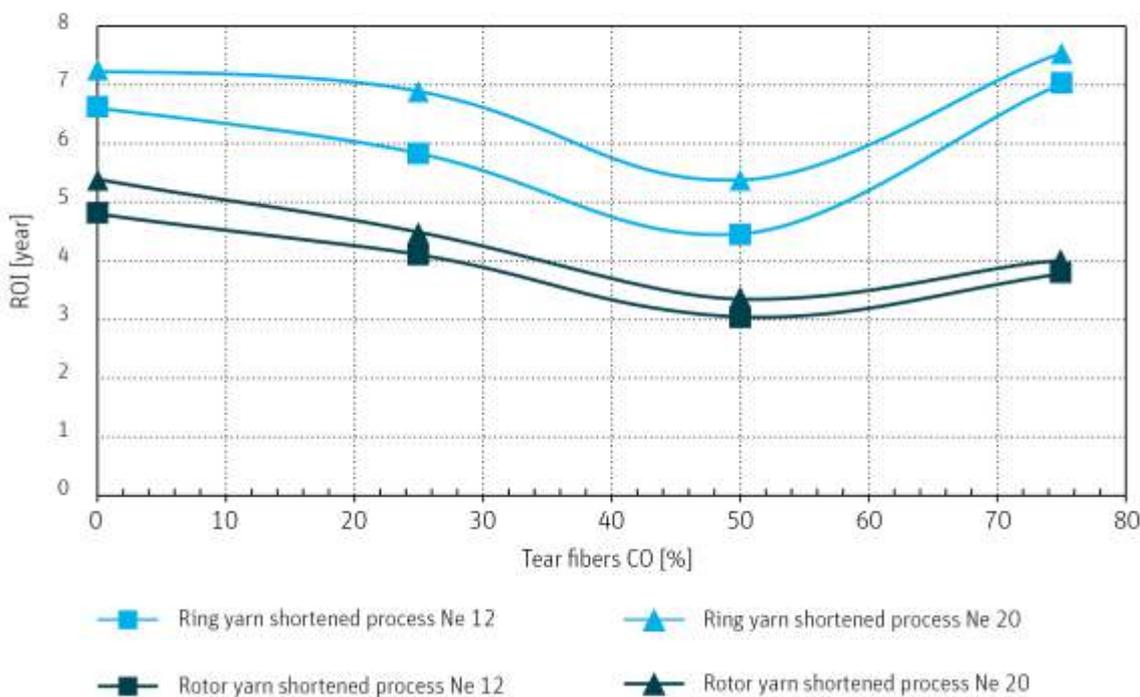


Fig. 5: The Return on Investment (ROI) is best for blends containing 25% to 50% recycled material.

### About Rieter

Rieter is the world's leading supplier of systems for short-staple fiber spinning. Based in Winterthur (Switzerland), the company develops and manufactures machinery, systems and components used to convert natural and man-made fibers and their blends into yarns. Rieter is the only supplier worldwide to cover both spinning preparation processes and all four end-spinning processes currently established on the market. Furthermore, Rieter is a leader in the field of precision winding machines. With 16 manufacturing locations in 10 countries, the company employs a global workforce of some 4 520, about 21% of whom are based in Switzerland. Rieter is listed on the SIX Swiss Exchange under ticker symbol RIEN. [www.rieter.com](http://www.rieter.com)

**Rieter Recycling Classification**  
Fiber key parameters for recycling

Classification	Short-Fiber Content	Mean Fiber Length	5% Fiber Length
Very good	45%	17 mm	31 mm
Good	55%	14 mm	29 mm
Medium	60%	13 mm	28 mm
Poor	78%	10 mm	22 mm
Cotton as a reference	24%	21 mm	34 mm

Fig. 1: The Rieter Recycling Classification allows a very good estimation of processability and yarn quality of the used material.

**Defining the optimal spinning process for recycled materials**

A very interesting recycling example is the re-spinning of used cotton clothes, e.g. T-shirts. Typically, the recycled raw material is blended with virgin cotton. This application was also used in the Rieter trial to determine the optimum spinning process. Both the requirements for raw-material preparation and the best machine configuration for spinning staple fibers were considered. The raw material in the trial was a blend of virgin cotton from Chad and bleached cotton recycled fibers which were mixed in varying proportions. The graphic below shows the process sequences within the spinning process (Fig. 2).

**Rotor yarn has the best unevenness**

In essence, the rotor spinning machine is well suited for processing fibers with a high short-fiber content (> 30%), which is reflected in better evenness (Fig. 3). This is due to better fiber feeding of the opened fibers in the closed fiber feed channel and the doubling of the individual fibers in the rotor groove. For acceptable yarn quality and operational reliability, a blend containing up to 75% recycled content is possible in this raw material configuration.

**Rotor spinning – Recycling cotton in blends with virgin cotton or polyester**



**Ring spinning – Recycling cotton in blends with virgin cotton or polyester**



Fig. 2: Process sequences for recycled materials

### Unevenness on Ring and Rotor Yarn

Virgin CO 29.7mm, 4.1 Mic/Tear fibers CO, Ne 20,  $\alpha$ e 4.7, Rotor 33-XT-BD

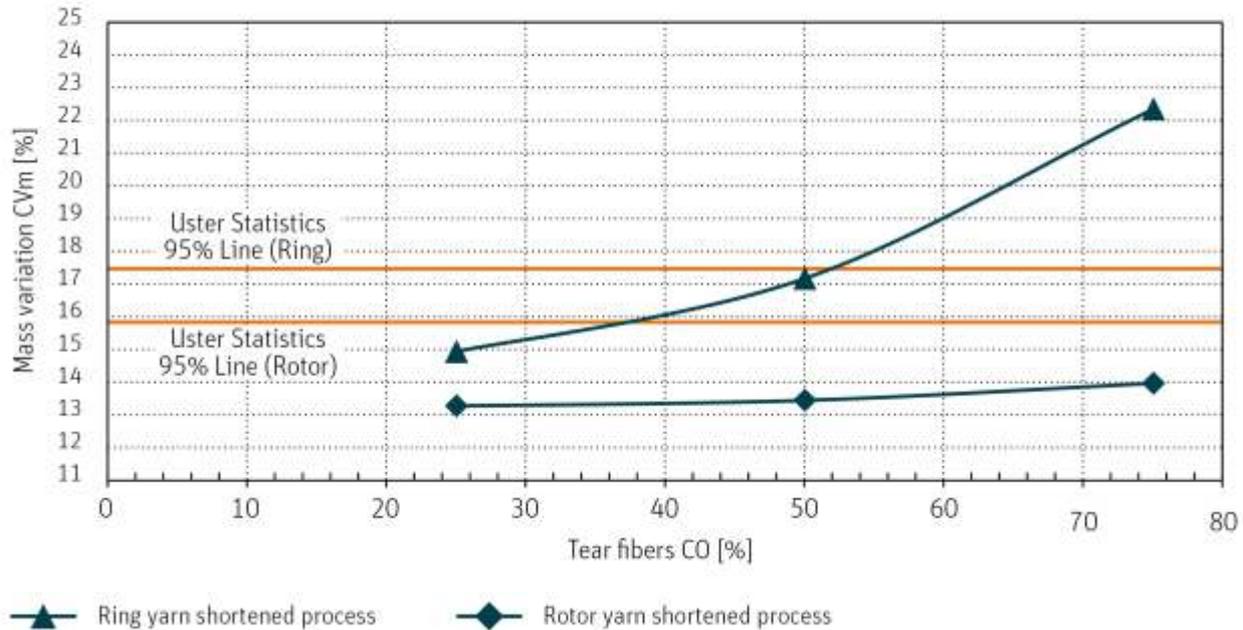


Fig. 3: The rotor spinning machine is well suited for processing fibers with a high short-fiber content, which is reflected in better evenness.

### Ring yarn has the highest tenacity

Ring yarn, by contrast, has the highest yarn tenacity on account of more intensive fiber integration (Fig. 4). This opens a wider range of applications, namely the increased use of these yarns in weaving mills. Tenacity reduces as the recycled and short-fiber content increases.

### Breaking tenacity on Ring and Rotor Yarn

Virgin CO 29.7mm, 4.1 Mic/Tear fibers CO, Ne 20,  $\alpha$ e 4.7, Rotor 33-XT-BD

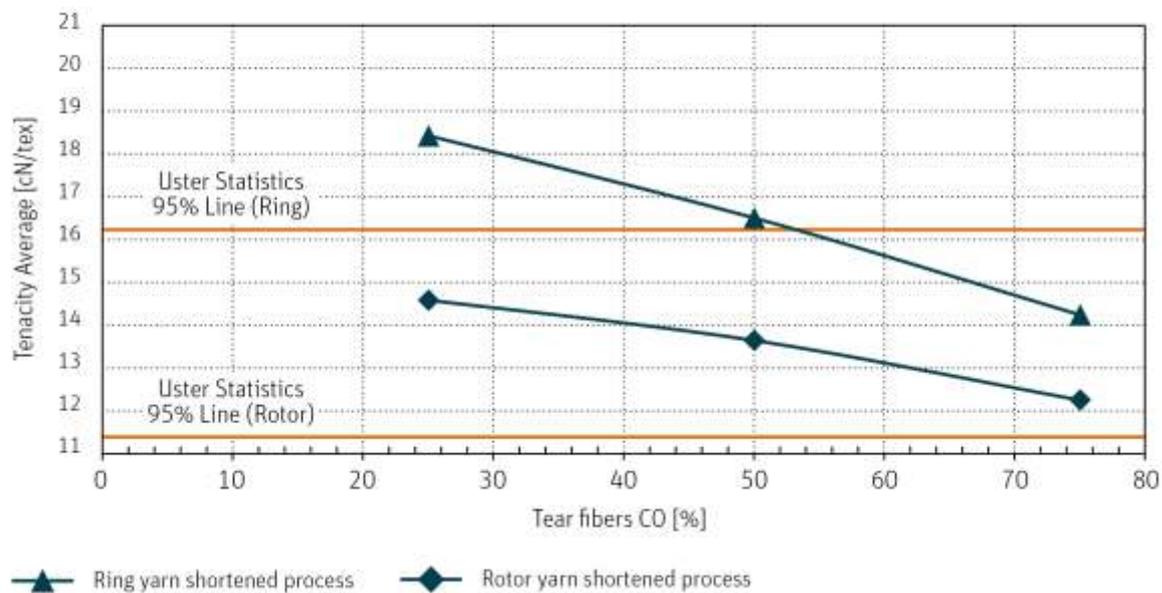


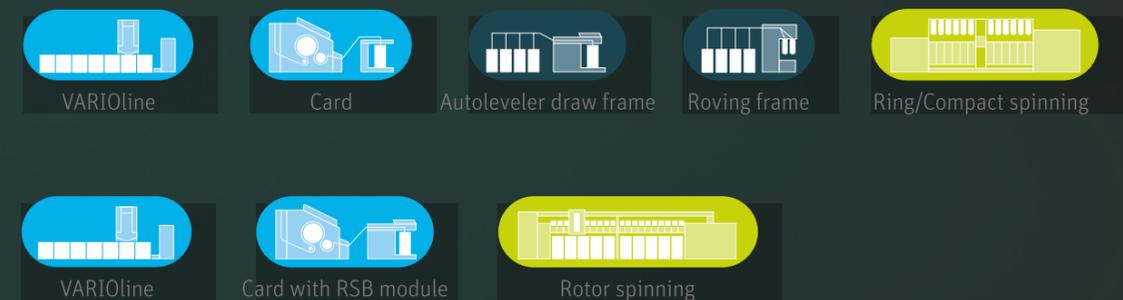
Fig. 4: The ring spinning process achieves significantly higher yarn tenacities than rotor spinning.

# Make the difference



## Close the textile loop with Rieter ring and rotor systems

Rieter offers a complete recycling spinning system for both ring and rotor spinning lines that enables customers to spin fibers from used garments and waste into yarns. While enhancing the rotor spinning technology, which is naturally adapted for applications using materials with short fibers, with special geometries and options, Rieter sets new standards and offers a complete ring spinning system that is designed to process recycled fibers in the best possible way. The yarns obtained make it possible to reuse pre- and post-consumer goods in a similar application, such as chinos or T-shirts.





## INDIA ITME SOCIETY A 42 YEAR JOURNEY TOWARDS "AATHMANIRBHARATHA"



**Mr. S. Hari Shankar**  
Chairman, India ITME Society

Outcome of a desire and vision by industry leaders way back in 1979 towards "Aathmanirbharatha" in Textile Technology for India, India ITME Society-a non profit industry body was born out of necessity. Today it is well recognised globally as a trusted organizer for multiple textile engineering exhibitions supporting textile industry beyond geographical borders of its country of origin.

Textile machinery manufacturing in India started in the post independence era. It was of course initiated during the pre-independence period. The problems faced by the Indian textile industry in repairing and maintenance of the imported machines from U.K. were the compelling factors in establishment of machinery manufacturing units. As the textile industry started growing, growth of domestic textile machinery manufacturing took place. During 60s complete range

of spinning machinery, weaving machinery and limited range of processing machinery were being manufactured.

Major innovations in the textile machinery manufacturing came into being during 80s. Most of the European machinery manufacturers, namely, Rieter, Trutzschler, Suessen, Karl Mayer, Sulzer, Picanol, Vamatex, etc. came up with high speed micro-processor controlled machinery in spinning, weaving, processing, knitting, etc. Going further, more stress was given by the European manufacturers to improve the productivity and quality of the product with electronic controls. It could be said that there was another technical revolution during 80s. It also created new opportunity for the domestic textile industry. The Modernization Scheme of the Government of India also helped in modernizing many textile units in the country

during the period. The vision expressed in the 1985 Textile Policy of the Government helped the textile industry to consolidate its position. Demand for textile machinery was showing a positive trend. This also helped the domestic textile machinery manufacturing industry.

The machinery industry felt the need to project its technology before the domestic textile industry. First effort was in the form of an exhibition which took place in 1971 at Backbay Reclamation Ground in Mumbai. The growth of the textile machinery industry was substantial during late 70s and the manufacturers felt it necessary to have a large forum and conduct textile machinery exhibitions of international standard in India. A plan for establishing an organization for holding international textile machinery exhibitions in India was conceived in 1978-79 and an Organizing Committee was set up consisting of representatives of TMMA, the Association of Merchants and Manufacturers of Textile Stores & Machinery (India) (now ITAMMA), Indian Cotton Mills' Federation (now CITI), Textile Association (India), Indian Standards Institution (now BIS).

India International Textile Machinery Exhibitions Society, popularly referred as 'India ITME Society' conducted its first Textile engineering exhibition in 1980 and since then the legacy has been successfully carried forward.

Today, the exhibitions held by ITME Society is reckoned for its brand strength and quality creating a bench mark for MICE Industry of India. Exhibition Industry of India has acknowledged India ITME Society for its exceptional service with awards like Excellence in Operations, Corporate Excellence, knowledge Hub, Best use of technology, the Royal show category and the mega quality award. India ITME Society was conferred jointly by The Economic Times & Indian Exhibition Industry Association as India's top 10 exhibition organisers (2016) and INDIA ITME exhibition ranked as India's 1st runner up in top B2B exhibition category.

India ITME Society has been successfully serving the Industry for 42 years now and hosts 3 Mega International Textile Technology events. I.e.

- India ITME Series flagship event promoting India as a investment and manufacturing hub and providing textile technology and engineering solutions to whole of S.E. Asia,
- Global Textile Technology Engineering Show (GTTES) providing customized textile engineering domestic regional textile hubs focusing on specific local requirements / segments.

- ITME-AFRICA Series which strives to promote Indian Textile Technology and Engineering solutions in developing new markets of African Continent.
- Virtual Buyer seller meet is the latest addition to the basket of events by India ITME Society which proves its prowess to adapt and deliver successful business interactions online and offline and under all circumstances.

Apart from organizing exhibition, exploring new opportunities for trade and investment has always been key activity of ITME Society. Market study on African continent has revealed an opportunity for textile segment provided correct technology and training is made available. Thus, ITME Africa was conceptualized and executed successfully. ITME AFRICA shall be a key driver and catalyst for India - Africa bilateral trade & investment in Textile sector in the coming years and a signature event in the journey of India ITME Society.

**ITME AFRICA 2020** - Textile technology & engineering Exhibition was held from 14th – 17th February 2020 at Addis Ababa, Ethiopia, showcasing 197 exhibitors from 13 countries. This first of its kind B2B technology event in Ethiopia, received visitors from total 44 countries in 3 days and connected 35 African countries leading to introduction of modern textile technologies to the continent and thus opening a new frontier for textile industry and machinery manufacturers along with allied sectors.

Exhibitors from 13 countries showcased modern textile technology and engineering products from various sectors including wastewater, recycling, dyestuffs and Chemical products, Pumps and valves, logistics equipment and cotton growing technologies. Six Country pavilions showcased 85 companies from India, Italy 22 companies. Swiss pavilion 12 companies, Turkey 4 companies, Ethiopia 3 companies and China 19 companies.

This 3 Day Exhibition offered a 360° support and solutions for entrepreneurs and companies interested in doing business with Africa with Concurrent programs such as Business to Business (B2B), Business to Government (B2G), Business to Finance (B2F) along with Financial & Technical seminars. A record **1359 B2B Meetings were held over 2 days whereby 21 companies appointed agents/dealers for Africa** and Value of Business Leads Generated was estimated 76,36,500 USD.

During this exhibition, LAXMI CM-R Shuttleless Flexible Rapier Loom manufactured by Laxmi Shuttle



Official Dignitaries representing India, Ethiopia and International Trade Centre at ITME Africa Inauguration in Addis Ababa- Left to right **H.E. Mr. Demeke Atnafu Ambulo**, The Consulate General Of The Federal Democratic Republic of Ethiopia in Mumbai, **Mr. Yesuf Ademnur**, Secretary-General, Ethiopian Chamber of Commerce and Sectors Association, **Mr. S. Hari Shankar**, Chairman, India ITME Society, **H.E Ambassador Dewano Kedir**, Permanent Secretary of Economic Affairs, FDRE Ministry of Foreign Affairs, **H. E. Mr. Anurag Srivastava**, Ambassador of India to The Federal Democratic Republic of Ethiopia, **Ms. Seema Srivastava**, Executive Director, India ITME Society, **H.E. Dr. Tizita Mulugeta**, Ambassador of Democratic Republic of Ethiopia to India, **H. E. Ms. Dorothy Tembo**, Executive Director, International Trade Centre, UN, Geneva, **Mrs. Munteha Jemal Seid**, Director General of Business Diplomacy, Ministry of Foreign Affairs, **H. E. Mr. Teka Gebreyesus**, Honorable State Minister, FDRE Ministry of Trade Industry, Ethiopia, **ATO Sileshi Lemma**, Director General, ETIDI, **Mr. Melaku Ezezew**, President, Ethiopian Chamber of Commerce and Sectoral Associations, **Mr. Rajat Srivastava**, Director & Regional Director, Engineering Export Promotion Council (EEPC INDIA), Ministry of Commerce & Industry, Govt. of India.

Looms, India was donated to Bahir Dar University of Ethiopia for Student Lab & Research Study introducing Africa to latest weaving technology from India.

Students from India's foremost technology & Research Institute – The Indian Institute of technology IIT Madras, presented their innovation – Agri Copter - Automization In farming : Aerial Spraying using Drone technology. IIT student project Agri Copter demonstrated automation technology enabling pesticide spraying process without human contact with toxic chemicals & reducing the burden on farmers across the agriculture industry including cotton sector.

This exhibition was supported by Ministry of Textiles-Govt of India, Ministry of Trade-Govt of Ethiopia SITA-ITC as Trade & Investment partner, Ethiopian Chamber of Commerce, ETDI. The 2nd Edition of ITME Africa will be held in Dec 2023.

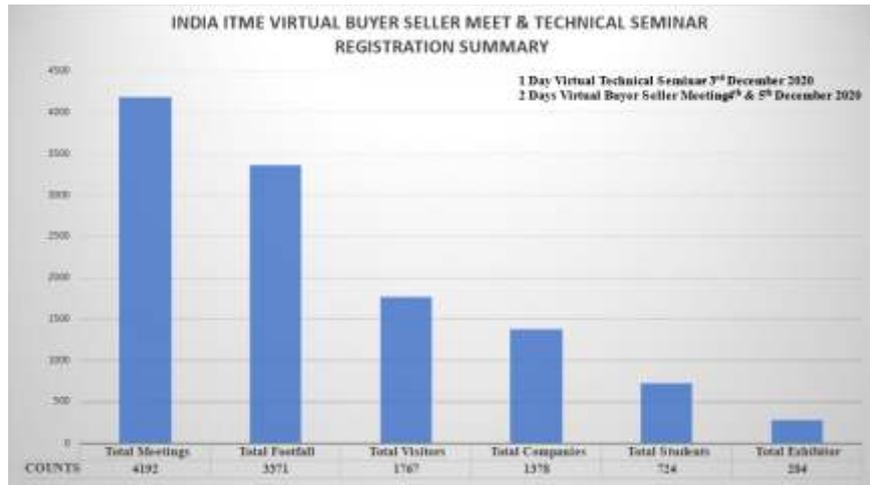
## INDIA ITME VIRTUAL BSM

India ITME Society organized free Virtual Buyer Seller Meet on 4th & 5th December 2020 as a support to textile machinery manufacturers to overcome slowdown brought by COVID crisis. The 3-day event commenced with Technical seminar on 3rd December 2020 followed by the Buyer seller meet on 4th & 5th December 2020.

First time ever virtual event by India ITME Society, was inaugurated by Ms. Roop Rashi Mahapatra (IA&AS), Textile Commissioner, Govt. OF India. During her inaugural speech The Indian Textile Commissioner, called upon the international textile machinery manufacturers known for their technological excellence, especially the European and Japanese machinery manufacturers for setting up their plants in India. The tech gaps in Indian Textile Industry are opportunities to have joint ventures with international leaders and also attempt to indigenize and innovate the processes in movement to make exports cost competitive.

The Morning session of Technical Seminar on Day 1 was focused on knowledge dissemination, A technical lecture on, Lot Size 1 – The Wish to Make It Right For All Customers" By Dr. Prof. Gloy from Aachen University was followed by Panel discussion on "Safety & Sustainability" by industry leaders.

284 textile machinery manufacturers from 18 countries showcased 400+ Textile technology & engineering products /solutions, making it one of the largest virtual platform for trade, investment & sourcing solutions for textile industry.



Apart from alertness to new opportunities, it is crucial to adapt and adopt the changes in its environment to stay on the top of the race and every change should be converted into competitive advantage. India ITME Society is vigilant and swift in adapting its programs to suit the needs of the industry and provides a safe platform to do business, whether it is a start up company or SME or a large multinational.

Also, for robust future of our industry, strong education, exposure to latest technology, learning experience are all absolute necessity. Through its various events and programs, ITME Society continue to diligently execute its responsibilities towards all round growth and success of Textile & Textile engineering Industry of our great nation in all possible way. In true sense, ITME Society is supporting partner to your business. We believe, Together we can be stronger, bigger and successful.



# Catapulting Indian Textile & Textile Engineering Industry into Global Arena



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### CHAPTERS

The highest ever 22 chapters in the Textile Industry

- |   |  |
|---|--|
| <b>01</b> Spinning Preparatory Machinery, Man-made Fibre & Natural Fiber Spinning Machinery, Winding, Texturing, Twisting & Auxiliary Machinery & Accessories | <b>11</b> Transportation, Material Handling, Storing & Packing Equipment   |
| <b>02</b> Web Formation Machinery, Bonding & Finishing of Non woven & Felting, Machinery related to Technical Textiles & Accessories                          | <b>12</b> Equipment for Recycling, Waste Reduction, Pollution Prevention & Accessories   |
| <b>03</b> Weaving Preparatory Machinery, Weaving, Tufting Machinery, Auxiliary Machinery & Accessories  | <b>13</b> Software for Design, Data Monitoring & Processing (CAD / CAM / CIM) & Integrated Production                                |
| <b>04</b> Knitting & Hosiery Machinery, Auxiliary Machinery & Accessories   | <b>14</b> ERP Package & Web based Solutions for Textile Industry   |
| <b>05</b> Embroidery & Braiding Machinery, Auxiliary Machinery & Accessories  | <b>15</b> Dyestuffs & Chemical Products for Textile Industry   |
| <b>06</b> Washing, Bleaching, Dyeing, Drying, Finishing Machinery & Auxiliary Machinery & Accessories   | <b>16</b> Associated Goods & Services the Textile Industry   |
| <b>07</b> Printing & Digital Printing Machinery & Auxiliary Machinery & Accessories   | <b>17</b> Machinery related to Engineering Products  |
| <b>08</b> Garment Making Machinery & Auxiliary Machinery & Accessories  | <b>18</b> Technical Information Services, Educational, Research Institutes & COE's   |
| <b>09</b> Making-up Industry Machinery & Auxiliary Machinery & Accessories  | <b>19</b> Natural / Man-made / Technical Fibres, Natural / Synthetic / Technical Yarns & Recycled Fibres & Yarns, Fabrics & Garments |
| <b>10</b> Laboratory Testing & Measuring Equipment  | <b>20</b> Home Textiles  |
|   | <b>21</b> Integrated Textile Parks   |
|   | <b>22</b> Medical Textiles   |



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- Wool, Polyester & Lycra Blends
- Cotton and Linen Shirting
- Jacquard for Home & Automotive
- Uniforms

### Finishes

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- Anti Fungal
- Moisture Management
- Anti Wrinkle
- Aroma

### Garments

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- Formal Trousers

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#### **REGISTERED OFFICE & MILLS**

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Banswara – 327 001 (Rajasthan)  
+91 2962 240690-93, 257679-68

#### **DAMAN UNIT (Somnath)**

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Sangita Dham & Complex, Near Savita Farm, Somnath,  
Nani Daman, Daman & Diu – 396 210  
+91 260 2240967 – 68

#### **SURAT UNIT**

Plot No. 5&6, Surat Apparel Park,  
SEZ Sachin, Surat – 394 230 (Gujarat)  
+91 261 2390352-53, 2390363

#### **DAMAN UNIT (Kadhैया)**

Survey No. 98/3 – 85/3&4, 86/2  
Kadhैया Industrial Estate, Village Kadhैया,  
Nani Daman, Daman & Diu – 396 210  
+91 260 2240 967 – 68

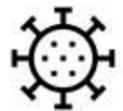
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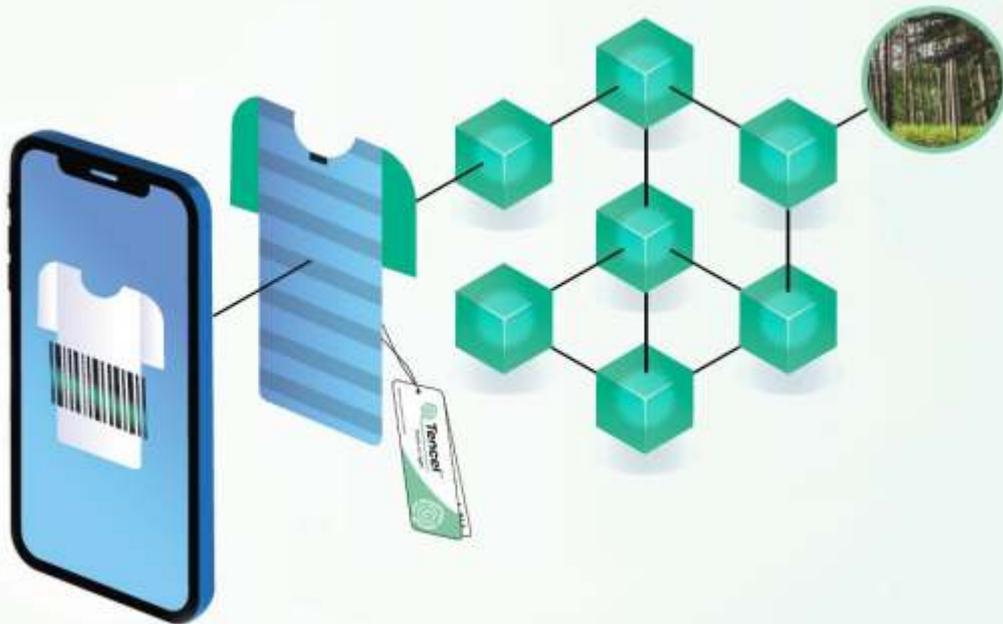


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## TRANSPARENCY AND TRACEABILITY THE FUTURE OF TEXTILE SUPPLY CHAIN



**Mr. Avinash Mane**

Commercial Head – South Asia and Middle East, LENZING AG

Conversations around the environmental impact by the fashion industry had been gaining momentum for a couple of years. 2020 has ushered in a new era for sustainability within the fashion industry, as the pandemic made it clear that efforts to minimize impact on environment needs to be a brand's focus. What were corner whispers in pre-COVID era has now become mainstream conversation as consumers are starkly aware of the damage done by fast fashion and impact of depleting resources.

In an economy still coming to grips with and recuperating from a global pandemic, the need to build more efficient supply chains is under spotlight to ensure resilience towards future crises, particularly of an environmental nature. An important step towards this is integrating information generated during the various stages of a product's manufacturing process. Despite

advancement in technology, this area in supply chain remains a challenge. Failure to integrate this is likely to leads to multiple dysfunctions. It is therefore crucial to improve traceability systems to strengthen the overall visibility of how supply chains work.

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.

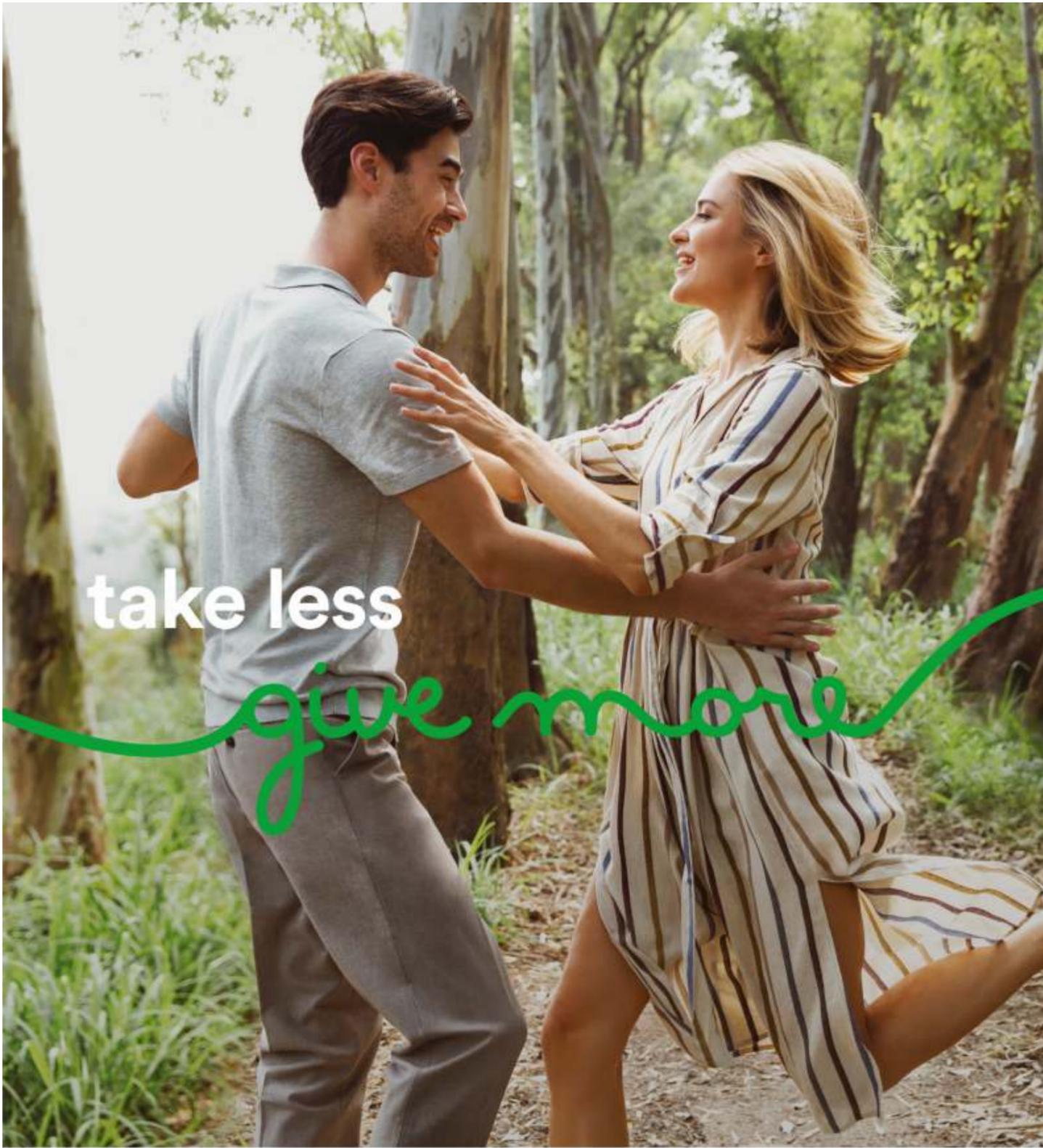
While, most of the top 100 fashion brands announced targets for 100% sustainable fibers target by 2025, however less than 5% of those brands can trace their textile inputs to verify the sustainability credentials of the fiber producers. As an effort to address this pressing challenge, three sustainability 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.



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# THE INDIAN TEXTILE INDUSTRY AND ITS GLOBAL APPROACH



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**T**he spinning wheel is often associated with India's journey to independence and even today, the country is spinning the wheel of economy through textile industry. During the recent pandemic, it was textiles and agriculture that contributed the most to economy. In FY2019-20, the Indian Textile Industry contributed approximately 2.3% to India's Gross Domestic Product (GDP) and 12% to India's Export Earnings. (Source - Indian Brand Equity Foundation). Besides providing direct and indirect employment to millions of people.

The Indian Textile industry has numerous advantages which make the country a preference for global buyers. Firstly, it is a heritage, a legacy. Textile manufacturing

dates back to ancient India so the expertise developed over first-hand experience is unparalleled. Secondly, we have a huge pool of trainable and untapped human potential. The country with highest youth population has a lot to offer. Thirdly, we have abundance and easy availability of raw material. Be it natural fibre or man-made, the requirement to import textile raw material in India is quite low. Besides, we have large production capacities, geographical advantage and are moving towards Aatmnirbhar Bharat through innovation and by augmenting our self-sufficiency.

The merit of Indian manufacturing has been accepted by the world. Precisely, if the coronavirus pandemic is to be discussed, we have moved from zero manufacturing



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Delivering Excellence. Since 1965.

## ACHIEVING CUSTOMER DELIGHT SINCE 1965

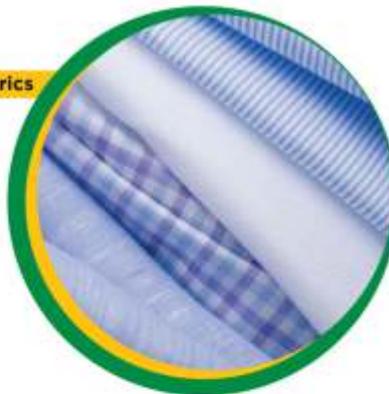
Vardhman is one of the largest vertically integrated textile manufacturers in India producing yarn and fabrics for both tops and bottoms in the apparel segment, serving large businesses across USA, Europe, Asia and several other emerging markets. With a turnover of more than a billion dollars, we produce 2,40,000 metric tons of yarn, weave over 180 million metres of fabric.

Currently, we have the largest installed spinning capacity in India -1.1 million spindles, and the leading Indian manufacturer and exporter of cotton yarn and fabric. We have 16 state-of-the-art manufacturing facilities located across India and a strong export presence in more than 75 countries across the globe.

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Fabrics



Fibres



Garments



Threads



Steels



**Vardhman Textiles Limited**

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of PPE kits to a record manufacturing of 2 lac kits per day. To meet the demand for protective gear, the manufacture of anti-microbial fabrics, facemasks etc. was done at a war scale. Even when it came to the vaccine, Indian brands became the first choice of other countries. Cost-efficiency, competitiveness, capacity all are in favour of Indian manufacturers. So, it is safe to say, the transformation of India as the Global Hub for textiles is already underway.

Digging down deeper into the outcomes of new normal, we have seen shift in customer preferences in the last one year. Owing to numerous reasons, the movement of customers from major economies to India, since the country is well placed internationally in terms of scale and technology, is highly anticipated.

The pandemic has brought about major changes across the globe. This economic crisis induced by a health crisis has changed the very meaning of normal for everyone. Individuals as also the organisations have suffered huge losses. The already volatile world of textiles also faced major challenges. From the shutting down of retail stores to inability of buyers to lift manufactured goods, the whole supply chain experienced a turbulence like never before but as they say, even the darkest of cloud has a silver lining, we have adapted to the change and managed to hold the ground.

Vardhman is a progressively responsible organization committed to sustainable development. It is our constant endeavour to cater to all three bottom lines of sustainability i.e. aim for green manufacturing, ensure prosperity of all stakeholders and contribute to the welfare of communities that host us. During the covid phase, we have continued to bear our responsibility. Be it financial contribution to relief funds and hospitals or sanitization drills in community, we have never held ourselves back when it comes to giving back to the society.

The first and foremost challenge that was faced with the advent of COVID-19 was keeping the employees safe and engaged. We left no stone unturned to make sure they remained safe and could conveniently receive everyday essentials. Initially, the manufacturing facilities were shut down but when we re-initiated the work, there was a lot to do. Safety policies were revised, shop floors were modified, foot-pedals, new sanitizing and hand washing points were installed, wearing of masks was made mandatory, awareness sessions were held, audio-video aids were utilized to keep the people safe.

At the same time, the concept of remote working, commonly called work from home was adapted. We moved to digital meetings and conferences, virtual



discussions, webinars etc. While the lack of physical proximity appeared as a challenge initially, it turned out to be an opportunity to save time, cost of travel and add convenience. We identified solutions to communicate effectively with customers, continue to give factory tours, showcase products and do everything that was normally performed through technology and virtual modes of communication. It was challenging to give the actual experience of hand feel and colors but for that too, technology came to our aid. Coronavirus propelled the digital transformation by limiting the options of doing the work otherwise. In terms of product development as well, we ventured into the manufacturing of special fabrics which had anti-viral and anti-bacterial properties. Functional yarns and fabrics were already being developed but considering the demand for defensive textiles, we launched Travel Shield – a range of protective fabrics to keep you safe on the go. Also, with masks becoming a part of attire, we developed face masks made from breathable and antimicrobial fabrics to fulfil the need. Every obstacle promises an achievement if adequately evaluated.

When the engine of economy started churning again, we had to work on several aspects. Marketing teams had to stay connected with the customers, understand their requirements and keep the interests of the organization in mind. The blessing being Vardhman's commitment to meet commitments at all times and developing enduring relations, we witnessed recovery, production-wise, soon after the lockdown was lifted. We even achieved our highest production ever this year. The pandemic and consequent lockdown had also disturbed the supply chain and we had to align different teams to overcome this barrier. Vardhman believes in nurturing talent and invests in people development, understanding that it is the right team that helps

achieve results. So, we paved our way successfully even in the unprecedented conditions of Covid-19.

Vardhman is catering to some of the most quality-conscious markets across 75 countries for the last 55 years. To maintain this lead, we are driven by factors like consistency, transparency, continuous product development and innovation, adapting with agility, offering the customers the freedom of choice through a wide product basket and ease of customization at any stage of production. These are the pillars of strength that help us sail through the storms and we continuously reinforce them.

Be it the new normal or the real normal, a company's growth strategy should be a perfect mix of short term and long term goals. A far-sighted approach is a powerful enabler and it is primarily the vision that becomes the guiding principle. The textile world sees change more often than most other industries. The ever-changing demand, market conditions, customer preferences and now, with the meaning of normal changed, the deliverables would too.

The coronavirus pandemic has raised the demand for defensive textiles and protective gear. But we should, as textile manufacturers, see it as just another change or a part of the series of changes that businesses undergo. Just as we started moving to sustainable solutions, towards organic and recycled raw materials, we have to adapt to the requirements developed by COVID-19.

Although life was altered to a great extent, we are hoping for the things to get back to normal but the lessons taught by the incident are to be remembered while going forward. We are preparing ourselves at all fronts, evaluating and analysing avenues which might need a review because progress and preparedness are co-related. Even if we exclude the influence of pandemic, sustainability has to remain at the heart of the organization as also the operations. And this sustainability is not restricted to environmental conservation and lowering carbon footprint. Sustainable Development is development in its true sense and the industry as a whole has to contribute to it.

Indian textile industry is armed with innovation, technology, competitive prices, easy availability of raw material, human capital and whatnot. Accepting the fact that demand and supply, market conditions and other factors do come into play, and that it always was and always will remain unpredictable, we still have a lot of things in our favour. Just a little support in terms of policies coupled with the endeavour of the industry is enough to transform the global textiles and apparels segment, making India customer's most preferred destination.

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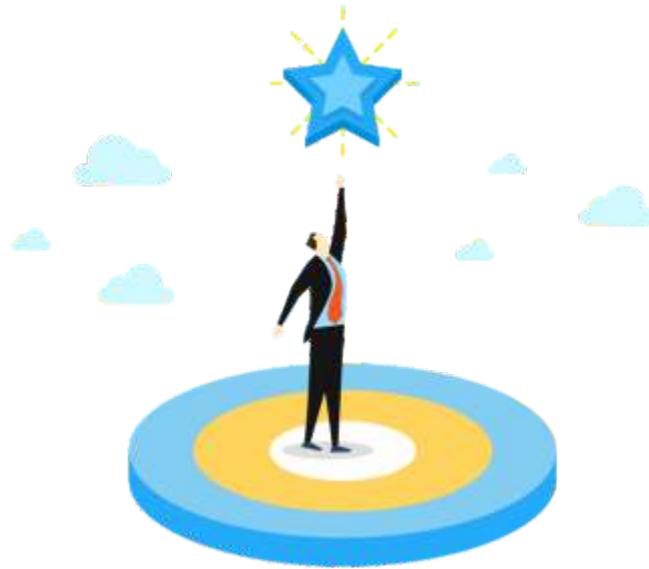
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# SKILL DEVELOPMENT NEW PATHWAYS AND OUTCOMES



**Dr. Vijay Yadav**  
Director (Operations), Textile Sector Skill Council

**Abstract:** TSC has progressively worked for meeting the skill requirement of the workforce engaged in the textile and handloom sectors. The training, evaluation and certification were done with the highest standards evolved over years. Looking at the peculiarity of the sector and specific demand, the schemes were improvised and adapted to the requirements of industry. Fresh avenues now exist before the industry through the “new industry friendly” apprenticeship scheme, thanks to the reforms in Apprenticeship Act, 1961. Best practices combined with the outcomes by the industry enabled scheme objectives to get fulfilled.

## 1. Introduction

Textile sector is the second largest employer in the country, after agriculture and requires distinct support to sustain through innovation, skill development and technological upgradation. The skilling needs of the textile and handloom industry is overly complex and distinctly separates it from other sectors. While the capital-intensive textile mill sector is second largest in the world, the decentralised sector of handloom and power loom remains the biggest source of employment contributing to more than 75% of India's textile production. As a result of distinct needs of the sector,

there had been many improvisations in policy targeted for augmentation in capacity, infrastructures, and skill development among many others [1]. Further, a different strategy is demanded for bridging the skill gap for both decentralised sector and organised sector of textile mills.

Additionally, the Textile Industry faces a unique problem of higher attrition rate causing a highly skewed ratio of Demand and Supply of Manpower resources. As per the industry estimate, the average stay of migrant workers is between 8-10 months. Over and above this the unprecedented pandemic of Novel Corona had further caused the skill imbalance.

Textile Sector Skill Council since its inception in 2014, has been actively working to help industry in bridging the skill gap, preparing skilled workforce, and meeting the manpower needs [2]. With the help of 450+ textile industries, national standards were developed for 90 job roles, 2.9+ lac candidates were trained across 24 states, 1350+ trainers were trained and 1000+ apprentices were engaged across various trades [3]. The standards for 90 job roles cover both an omnipresent cotton segment as well as other critical segments of Wool, Jute and Technical Textiles. These 90 job roles account for more than 80% workforce engaged in the textile industry while standards for segments Quality Control, Silk etc., engaging remaining workforce are under development.

The paper explores the opportunity and the pathway enabled for the industry to move forward. It further elucidates the contributions of TSC in fulfilling the needs of the industry.

## 2. Skilling Schemes for Textile Industry

Govt of India flagship scheme under the Skill India Mission is the Pradhan Mantri Kaushal Vikas Yojana (PMKVY) [4] and is the initiation point. PMKVY now is also serving as baseline for most of the schemes being run now under other central ministries, state ministries and various departments. While the PMKVY [4] lay down guidelines and procedural in & outs, the complete implementation is accomplished at a unified Skill India Portal [5]. This portal is gradually getting integrated with other schemes to represent one portal at national level for all skill implementation and monitoring. Some of the prominent skill development scheme are detailed below:

### A. PMKVY

PMKVY3.0 launched on 15<sup>th</sup> Jan 2021 is implemented through Center, called Centrally Sponsored Centrally Managed (CSCM) and through State, called Centrally Sponsored State Managed (CSSM). The targets between these centre and state components have been divided approximately in ratio of 75: 25, respectively [6]. The candidate certified through PMKVY receives a skill certificate with a 3-year ₹2 lac accidental insurance cover and ₹500 (one time) as incentive. All monetary transactions happen by DBT and directly to the respective stakeholder.

The scheme allows skilling under components of Short-Term Training (STT) and Recognition of Prior Learning (RPL):

### (a) Short Term Training (STT)

Implemented through accredited and affiliated training centres (Ref. “Lifecycle of Training partner & Training Centre” of [5] for details). The training aimed for the unskilled and unemployed youth, is as per the designated hours (normally >300hrs) for the Job Role. Training cost is reimbursed directly by DBT to the employer (training provider) as per the common norm (@₹49.0 per hour) based on the total hours designated in the QP along with mandatory hours for entrepreneurship, digital literacy etc.

### (b) Recognition for Prior Learning (RPL)

RPL is implemented in camps, employer premises or at the designated centres. Now provisions are made to undertake RPL online also. This scheme requires a 12-hour orientation and provides certification to a person who is already skilled. RPL mainly focuses on the individuals such as weavers, hand spinners engaged in unregulated decentralised sectors such as Handloom & Power loom, however, looking at the reskilling/upskilling requirement it is gaining importance in the organised mill sector as well.

## B. Non-PMKVY

All skill development schemes which are not in ambit of PMKVY, falls under non-PMKVY. It includes all, but not limited to, the following:

- (c) State sponsored schemes
- (d) Other central ministry funded schemes like,
  - i. National Backward Classes Finance and Development Corporation (NBCFDC)
  - ii. National Safai Karamcharis Finance & Development Corporation (NSKFDC)
  - iii. National Schedule Caste Finance and Development Corporation (NSFDC)
  - iv. Deendayal Antyodaya Yojana-National Rural Livelihoods Mission (DAY-NRLM)
  - v. Deendayal Antyodaya Yojana-National Urban Livelihoods Mission (DAY-NULM)
  - vi. Deen Dayal Upadhyaya Grameen Kaushalya Yojana (DDU-GKY)
- (e) CSR initiatives

### C. Apprenticeship Scheme (NAPS):

Apprenticeship Training which is covered under the Apprentices Act, 1961 (last amended in 2014) is now

gelled with all kinds of skill training. Major thrust of apprenticeship scheme is on Incentivizing Employer and Integration with other Skill Development Programs, thereby Creating Pathways. Dedicated apprenticeship portal [6] is one place destination to do Basic Training Provider (BTP) registration, Employer registration, apprentice application, tracking the apprenticeship lifecycle including the pay-outs. Refer to FAQ on apprenticeship portal [6] for further details.

Industry can take apprentice under any of the below route:

- Certified candidates under any of the NSQF aligned schemes, such as, PMKVY, DDUGKY etc; graduates/diploma holders (or currently pursuing); ITI pass outs; Dual-Learning Mode from ITI.
- Unskilled candidates for which industry can provide basic training as per the QP and get incentivised.

**Advantages to employers under NAPS:**

- Can Engage apprentices in a band of 2.5% to 15% of total strength of establishment (including contract workers)
- **Rs 1,500 or 25% of minimum wages (semi-skilled) per month** per apprentice would be reimbursed for 1 year directly to the employer.
- Submission of returns, other information, and contract of apprenticeship through on-line portal and its time bound approval
- Unique Centralized portal payments. No paperwork.
- Apprentices are not workers and exempted from PF, ESI and Other statutory requirements.
- No liability of employment after training.
- Can Engage apprentices under both designated and Optional trades (QPs developed by TSC are all optional trades)
- Scope has been extended to non-engineering pass outs.
- Employers can have a training program relevant to their requirements.
- Apprentice cannot participate in Unionize Activities.
- Single approval for multiple plants in case the entity exists in 4 or more states.

**3. TSC Best Practices**

To ensure that the skill development schemes are implemented with highest standards, various best practices were evolved.

**(a) Assessor/Assessment Agency (AA) Management**

- Quality Assessors:** The Technical Committee of TSC for Affiliation, Accreditation and Assessments has fixed stringent norms to have quality assessors as per industry requirements. For textile mill sector job roles assessors must be ITI/Diploma/Degree in the relevant field with 15/10/5 years of industry experience in the relevant sector. For the Handloom sector, National Awardees/ faculty of Indian Institute of Handloom technology (IIHT)/Weavers' Service Centre (WSC)/with seven years of experience as a weaver are eligible.
- One channel of assessor engagement:** Assessors are engaged only through Assessment Agencies accredited by TSC. Independent assessors are connected to the respective Assessment Agencies in their region. This ensures double check-at AA level and TSC level for assessors' credentials and answerability.
- Training of Assessors (ToA):** All assessors are required to undergo ToA and assessments as per NSDC guidelines. Only those who successfully clear the assessments with minimum 80% marks in the respective QP are permitted to conduct assessments.
- Uniform Assessment strategy as per industry needs:** In line with Assessment criteria listed for each QP, TSC has developed Assessment strategy for each QP in consultation with the stakeholders which is as per industry requirements and being followed for all assessments.
- Checking of Question Papers:** Each question paper before every assessment is checked at TSC for its correctness, relevance and alignment to assessment strategy and criteria.

**(b) Conducting Assessments**

- Ensuring quality and transparency:** TSC evolved an internal system of generating



reports of the assignments done to various AA over their assigned geographical regions. These reports at the end of Month/Quarter are also shared with all AA for better transparency and to allow one to know the business done by another AA in that period.

**ii. Monitoring of assessments:** TSC have implemented monitoring mechanism through following ways:

- Surprise visits by TSC staff or by appointed invigilators in various states. All reports are uploaded on the NSDC Mobile App Senpiper.
- Video/Voice call at Centre on the day of all assessments and conversation is done with Trainer, Assessor, TP SPOC and some of the candidates.
- Bringing the activities of assessment live on the dedicated [TSC Facebook page](#) at @textilessc. All assessment agencies and key SPOCs of TPs are made Editors with limited rights of posting on [TSC Facebook page](#). These feeds are monitored by the TSC team.
- Videos during assessment are also put on Twitter live and TSC handle @textilessc is included in these tweets.
- In-house database captures the batch wise details of all the above instances along with the observations and web links Facebook/Twitter posts along with the Dropbox links of the associated files.

**C) Operation Management**

**i. Process Management:**

- Inhouse database captures the periodic information provided by SDMS as well as the information provided by the assessment agency manually.
- Continuous capturing of information from Assessment agencies such as, assessor feedback, Assessment Completion Report (ACR), photographic evidence etc through their respective link on data cloud.
- ACR serves an important link while the results are approved, and certificates are generated.
- Daily internal reports are generated on the pendency in the result uploaded by the agencies and followed-up becomes aggressive once the pendency exceeds 5th day of assessment. Through this it is ensured that results gets approved within 10 days of assessment.
- Check is maintained through periodic analysis for Assessors deployment, marks distribution etc. and accordingly feedback is shared with the AA.

**ii. Assessment Agency Evaluation System:**

An objectively evaluation system to rate the assessment agency is in place wherein they are evaluated on five major criteria namely, Process Lapses; Ignorance; Denial of assessment; Incompetency; and Unethical Practices/Misconduct. Based on the various categories of instances and their levels of severity registered against the performance of AA, a mathematical evaluation of their performance is done which includes scores based on undesirable instances, ignorance factors, desirable performance factors and certain subjective factors. Finally, an objective rating based on the scale on 0-10 is done for the AA, where the highest rating for a best performing AA.

**4. Skilling outcomes through industry**

In the overall trained candidates, 60% constitute women and showcase the Women empowerment through Skilling. Majority of these women are from below the poverty line, MBC and SC, ST Category. They are professionally skilled at various training centres, majorly Textile Mills across India and are employed at prevailing wages rates. Also, significant percentage of



mills helping the women employees to pursue their higher education and other development oriented vocational skills like, Tailoring, Type Writing, Computer Basics Etc.,

Processes were improved based on continuous monitoring, Nonconformities, Customer Complaints, Continual Improvement etc., Some examples are,

- Simplex doffing in which normally the bobbins are taken out first and kept it over the Drafting top roll clearer assembly then after doff completion it is transferred again to trolleys. Instead, directly keeping it in trolley avoids unnecessary additional work and frequent failures of Top roll clearer assembly.
- In autoleveller drawing normally the stairs are in both sides of the machines to get access to drafting and other zones, now they could modify the stairs to access from creel zone, so that immediately after sliver creeling worker could straightaway move to the machine to drag the sliver and feed in to scanning roller and if required attend the drafting zone work.
- In spinning after taking the broken yarn from cop normally it is first guided into the traveler and then to the lappet hook. Now it is changed to, first insert to lappet hook and then traveler which enables the yarn withdrawal easier and it reduces the failure rate in piecing and avoids repeated attempts.
- In Autoconer to enable the disabled persons (Walking Disability) working with our inputs, motorized trolleys are manufactured by suppliers and fitted in the machine, which enables the disabled person can work as Autoconer sider and normal persons walking throughout his 8 hrs of work which significantly reduce their work burden.

Also based on motion study some of the age-old work

practices could be modified, such as,

- always to keep the cop trolley in the left side of the sider in Autoconer
- always take minimum 4 to 5 cops in the left hand and that also by holding the top edge of the cop
- unravel the tail end of the yarn from all the 5 cops at a time with the right hand and then feed the cop one by one from the left hand. This increased the speed by about 30% from the traditional 1 or 2 cop concepts.

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## SKILLING -THE ROAD AHEAD



**Dr. Swapna Mishra**  
Director (C&T), Textile Sector Skill Council

Skilling has received its due attention in recent times. The government as well as the stakeholders have realized the importance of imparting the right skills for a stronger economy and a brighter future. India is one of the youngest nations, with more than 65% of its population in the working age. However, despite the increasing literacy in the country, the youth have been struggling for jobs, while the industry has been facing a shortage of the right candidates. It is well accepted that most do not have the right skills required for employment. Further, with the country speeding up on the development path, more and more jobs and new avenues are being created. Schemes like “Make in India” are creating jobs with specific skill requirements. The skills shortage is evident across most sectors resulting in a serious financial threat. Skilling, re-skilling, and up-skilling of the youth is no

longer a matter of choice but mandatory for growth. The role of skilling is crucial in the economic growth of the country. According to World Trade Organization (WTO), focussing on Skill development and Training may boost by 3%-5% of India's GDP. The “Skill India” initiative is a welcome step towards this.

The first National Policy on Skill Development launched in 2009 marked the beginning of competency-based skill training. India had 250-300 million youth in the 'not in employment, education or training' (NEET) category in 2009, with 8-9 million being added every year. The country's economy and literacy rate were growing fast and ironically, so was the skill gap. Bridging the skill gap required immediate and effective measures. Traditionally, skill training was imparted in dedicated Vocational Training

# TEXTILE SECTOR SKILL COUNCIL



“ I call upon the nation to take a pledge to make India the Skill Capital of the World. ”

**TSC's ACHIEVEMENTS**  
Schemes: PMKVY, APSSDC, NBCFDC, NSFDC, NSKFDC & NCSR

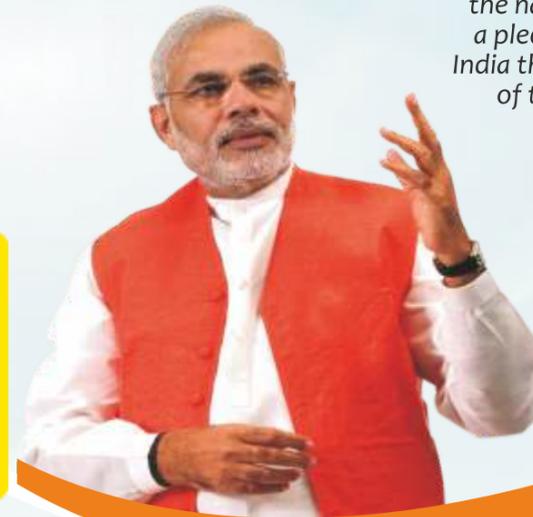
Indian Textile Industry provides revenue which is 27% of the total foreign exchange, mainly through textile exports. It contributes nearly 14% of the total industrial production of the country. Indian textile industry is also the largest in the country in terms of employment generation and currently generates employment to more than 35 million people.

To remain competitive in the open market, it is essential that the industry gets skill labor. Govt has taken strong initiatives to support skilling of workforce.

## STRATEGIC HIGHLIGHTS

Affiliated 279 training partners. Out of these 195 are from organized mill sectors and 84 are from unorganized sector. To enhance spread of training over number of job roles, qualification packs were developed for 90 job roles.

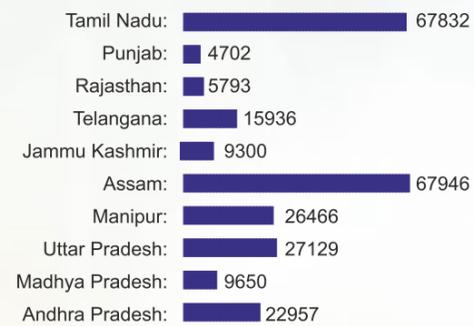
58 Workshops were organized across India and including North-East.



TSC has a strong presence on social media and is now able to connect with remote areas of the country.



## Region wise Enrolment :



Textile Sector Skill Council (TSC) is a not-for-profit Section 8(1) company established in August 2014 by 17 industry associations and 3 export promotion councils.

Continuously guided and monitored by more than 80 stakeholders representing all sub-sectors of the industry - organized textile mills and MSMEs.

## TSC has ...

- ✓ developed a full-fledged skill ecosystem to meet the skill needs of more than 80% of workforce employed both in organized mill sector, as well as, small and medium units of decentralized sectors which include handlooms, power looms and dyeing & printing units.
- ✓ established 430+ training centers all across the country which are operated by 1,350+ certified trainers.
- ✓ developed 90 QPs. Out of these 67 QPs were offered to train more than 56,000 fresh candidates and 2,20,000 RPL candidates across 19 states including NE and J&K.
- ✓ enabled 80% of certified candidates to be employed by industry with salary ranging between Rs. 8,000 and 14,000 (CTC).
- ✓ facilitated 250 RPL certified handloom weavers in availing Pradhan Mantri Mudra Loan to become entrepreneurs.
- ✓ connected 160 certified handloom weavers to buyers from foreign countries.

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Institutes, like the Industrial Training Institutes (ITIs) having the limited capacity and offering long term courses created years ago and with limited placement options. Short-term-modular training involving the private sector in training delivery, assessments, and certification was a viable solution for this ballooning problem. These programs trained the youth enough to be provided jobs in the industry as semi-skilled workers. Further skills were picked up on the job, through an effective work-based learning mechanism, to become fully skilled. Since it was not feasible practically to establish the huge training capacities required in a short span of time, policies and schemes were designed to incentivize the private sector to do so swiftly. As a result, there are various organizations and schemes available in the country offering opportunities for Skill training.

Nevertheless, vocational education has always been perceived to be inferior to mainstream education and meant largely for students who are unable to cope with the latter. Young people aspiring to have promising careers would choose the academic route and not the vocational one. This was although the former involved shorter durations, lower cost, were often supported financially, conducted at the workplace, giving the candidates the ability to apply new knowledge to real-life situations, learning interpersonal skills through working in a team with colleagues, was designed to meet the specific needs of employers and job and offered better chances of finding immediate employment as compared to the academic route. While more and more academic graduates entered the job market, competing for the same jobs, the industries continued to suffer due to a lack of a skilled workforce. Academic and Vocational education continued to be on opposing sides for many years. The need to align higher education with the emerging needs of the economy has been a long-felt necessity, to

create a workforce that was not only skilled as per the requirements of the trade but also academically strong and contribute effectively to the country's progress. The idea that skill training and mainstream education were mutually exclusive needed to be revisited, to build the required pool of youth with adequate knowledge and required skills for employment and entrepreneurship.

The National Education Policy (NEP) launched in 2020 aims at restructuring the Indian Education system to one that is a judicious blend of vocational and academic education, offering multiple entries and exit options. This offers an opportunity for the candidates to engage in vocational and mainstream education side by side, at the school level as well as higher education. There is an added opportunity for school leavers to rejoin mainstream education at the right opportunity and utilize the knowledge and experience gained during their employment for scoring credits required for the award of a certificate or degree.



While the National Skills Qualifications Framework (NSQF) caters to the skill training ecosystem, a National Higher Education Qualification Framework (NHEQF) formulated by the General Education Council (GEC), in sync with the National Skills Qualifications Framework (NSQF) will ease the integration of vocational education into higher education. NHEQF will frame expected learning outcomes (graduate attributes) for higher education programs.

The programs running at school are at NSQF level 3 to 5 and are offered from class 6th to 12th. UGC's B. Voc. is a graduate programme offering multiple entries and exits with a blend of skills and academic components as per the industry's requirements. The Skill component courses are at levels 4 to 7 during the entire duration of the program. MGNF is a 2-year fellowship, with classroom training at IIMs, along with intensive field immersion at the district level. The young individuals who undergo this fellowship program will be creating credible plans and identify barriers in raising employment, economic output and promote livelihoods in rural areas. Apprenticeship programs offering stipend are also available in various trades which support the students to undergo "On-The-Job" skill training with an academic degree. The Apprenticeship provisions are made more employers friendly and more and more industries are joining in the effort to have a skilled workforce to boost the production and economy.

Textile Sector Skill Council (TSC) has developed 89 Qualification Packs (QPs) which are NSQF aligned and offer immediate apprenticeship and placement opportunities. Many industries have come forward to train and employ candidates and engage Apprenticeships aligned to TSC QPs. Also, the QPs form the Skill component of many UGC B.Voc. programs across the country. TSC QPs are also part of a unique initiative that offers an opportunity for the career progression of Handloom Artisans and their inclusion in mainstream education. Candidates certified in two of TSC QPs are required to complete a reduced number of contact hours (30 as compared to 120 for each subject) for class tenth certification through the National School of Open Schooling (NIOS). Four months certificate course aligned to TSC QP "Handloom Entrepreneurs" is offered at six Indian Institutes of Handloom Technologies (IIHTs) across the country and prepares and handholds class tenth



pass candidates to be Handloom Entrepreneurs. TSC is also facilitating Skill training of Handloom Artisans as Textile Designers with competency in DigiBunai- a Computer-Aided Designs Software for Textile developed by Digital India Corporation. TSC facilitates Short Term Training (STT), Recognition of Prior Learning (RPL), RPL with Bridge course, Re-skilling and Up-skilling aligned to its Qualification Packs in Textile Mill and Handloom sectors. The funding for the same is available under various Government and non-government schemes as well as fee-based programs. Further details are available at [www.texskill.in](http://www.texskill.in)

The Covid-19 pandemic situation has brought forth two pressing needs- "Vocal for Local" and the need to expand into Technical textiles. TSC is in discussions with the Central Board of Secondary education (CBSE) to implement TSC QPs through CBSE schools across the country. The idea is to offer those courses through schools which provide an opportunity for local employment, in line with "Vocal for Local".

Further, TSC is in the process of identifying and developing new Qualification Packs for Technical Textiles and niche areas offering value addition. The Qualification Packs are developed with inputs from the stakeholders regarding the industry requirements and validations from the industry.

Through this article, TSC invites inputs from the stakeholders regarding the above. Suggestions may be mailed to the CEO-Textile Sector Skill Council at [info@texskill.in](mailto:info@texskill.in)



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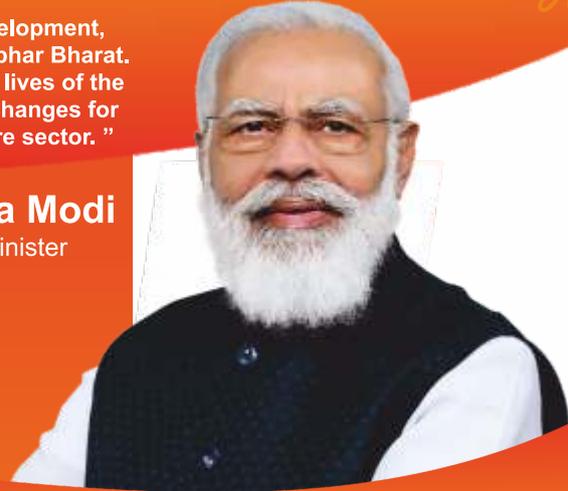
Garment: [rajesh.naik@technocraftgroup.com](mailto:rajesh.naik@technocraftgroup.com), (9867314366)

“ Instilling a sense of reality and confidence of development, the budget for the year 2021 is a budget for Aatmanirbhar Bharat. It emphasizes on improving the ‘ease of living’ in the lives of the common people and aims to bring several positive changes for individuals, investors, industry and the infrastructure sector. ”



**Smt. Smriti Zubin Irani**  
Hon'ble Minister of Textiles and  
Women & Child Development

**Shri Narendra Modi**  
Hon'ble Prime Minister



## TEXTILE BODIES HAIL MAJOR ANNOUNCEMENTS FOR THE TEXTILE & APPAREL SECTOR IN THE UNION BUDGET 2021-22

- **Production Linked Incentive (PLI) scheme for MMF Garments and Technical Textiles with a total outlay of Rs. 10,683 crore:**
  - ✓ To create and nurture manufacturing global champions for an Aatmanirbhar Bharat
  - ✓ To help manufacturing companies become an integral part of global supply chains, possess core competence and cutting-edge technology
  - ✓ To provide jobs to the youth
- **Announcement of setting up Seven Textile Parks in 3 years under the Mega Investment Textile Parks Scheme (MITRA):**
  - ✓ Textile industry to become globally competitive, attract large investments and boost employment generation & exports
- **Women allowed to work in all categories and also in the night shifts with adequate protection**
- **Revision in definition of Small Companies under Companies Act, 2013 by increasing their thresholds for Paid up capital from “not exceeding Rs. 50 lakh” to “not exceeding Rs. 2 crore”, and turnover from “not exceeding Rs. 2 crore” to “not exceeding Rs. 20 crore”**
- **Allocation of Rs. 15,699.65 crore for MSMEs**
- **Allocation of Rs. 3,631.64 crore for Textile and Apparel Industry**
- **Skilling Initiatives:**
  - ✓ Rs. 3,000 crore for realignment of existing National Apprenticeship Training Scheme (NATS)
  - ✓ Initiatives for partnership with other countries like UAE & Japan in skilling
- **Incentivizing Digital Economy to enhance ease of doing business**
- **Rationalization of Procedures and Easing of Compliance**



# UNION BUDGET 2021-22 HIGHLIGHTS



## AATMANIRBHAR BHARAT ABHIYAN

- **Government Reforms**
- **Increase in borrowing limits of state governments.**
- **Privatisation of Public Sector Enterprise.**
- **MSMEs and Industry**
  - Allocation of Rs 15,699.65 for MSMEs
  - Collateral free loans for businesses
  - Fund of funds will be set up for MSMEs
  - PM Garib Kalyan Yojana
  - Subordinate debt for MSMEs
  - Disallowing global tenders of up to Rs. 200 crores
  - Change in definition of MSMEs

## • **Energy**

- Liquidity support for discoms
- Elimination of Regulatory Assets
- Commercial coal mining
- Reduction in cross subsidy

## INDUSTRY

- **Production Linked Incentive (PLI) scheme** launched to create manufacturing global champions across 13 sectors with amount committed nearly Rs 1.97 lakh crore in next 5 years starting FY 2021-22.
- **National Infrastructure Pipeline (NIP)** Project expanded to 7,400 projects.

## TEXTILES

- Reduction in the BCD rates on Caprolactam, Nylon chips, Nylon Fiber & Nylon Yarn to 5%. (Sl. Nos. 37 & 38 of Notification No. 02/2021-Customs dated 1st February, 2021).
- Raise in customs duty on Cotton from nil to 10% (5% basic custom duty and 5% Agriculture Infrastructure & Development Cess) and on Raw Silk and Silkyarn from 10% to 15%.
- Imposition of 10% basic custom duty (BCD) on Cotton Waste
- Production Linked Incentive (PLI) Scheme for MMF Garments and Technical Textiles with a total outlay of Rs.10,683 crores.
- Mega Investment Textile Parks Scheme (MITRA) to create world class infrastructure for global champions in textile sector leading to creation of 7 textile parks over 3 years.
- Revision in definition of small companies under Companies Act, 2013 by increasing their thresholds for Paid up capital from “not exceeding 50 Lakh” to “not exceeding 2 Crore” and turnover from “not exceeding 2 Crore” to “not exceeding 20 Crore”.
- Women allowed to work in all categories and also in the night-shifts with adequate protection.

### **Extract of Budget Speech on Product Linked Incentive Scheme (PLI)**

*“For a USD 5 trillion economy, our manufacturing sector has to grow in double digits on a sustained basis. Our manufacturing companies need to become an integral part of global supply chains, possess core competence and cutting-edge technology. To achieve all of the above, Product Linked Incentive (PLI) schemes to create manufacturing global champions for an AtmaNirbhar Bharat have been announced for 13 sectors. For this, the government has committed nearly 1.97 lakh crores (Rs 10,683 crores for Textiles), over 5 years starting FY 2021-22. This initiative will help bring scale and size in key sectors, create and nurture global champions and provide jobs to our youth.”*

### **Extract of Budget Speech on Mega Investment Textiles Parks Scheme (MITRA)**

*“To enable the textile industry to become globally competitive, attract large investments and boost employment generation, a scheme of Mega Investment Textiles Parks (MITRA) will be launched in addition to the PLI scheme. This will create world class infrastructure with plug and*

*play facilities to enable create global champions in exports. 7 Textile Parks will be established over 3 years.”*

## INFRASTRUCTURE

### **National Rail Plan**

- Aims at developing adequate rail infrastructure by 2030 to cater to the projected traffic requirements up to 2050.
- The objective is to increase the modal share of rail in freight from the current level of 27 % to 45%.
- 100% electrification of Broad-Gauge Routes by 2023.
- Indigenously developed automatic train protection system to be launched.
- 139 GW of installed capacity was added during 6 years connecting additional 2.8 crore households with addition of 1.41 lakh circuit km of transmission lines.
- Revamped reforms-based result-linked power distribution sector scheme will be launched with an outlay of Rs 3,05,984 crore over 5 years.
- Hydrogen energy mission will be launched.

### **Ports, Shipping, Waterways**

- PPP mode to be utilised for managing operational services of major ports.
- Subsidy support to promote flagging of merchant ships.
- Recycling of Ships Act, 2019 enacted and recycling capacity to be doubled by 2024.

## FINANCIAL REFORMS

- Rationalised single Securities Markets Code by 2022.
- World class fintech hub at GIFT IFSC.
- Permanent institutional framework for Corporate bond market.
- SEBI as regulator and greater role for WDRA for development of commodity market ecosystem.
- Investor charter as a right across all financial products.
- Amending the Insurance Act, 1938 to increase the FDI limit with safeguards.
- Asset Reconstruction Company Limited and Asset Management Company to resolve stressed assets problem of PSBs.

## HUMAN CAPITAL

- **R&D**
- National Research Foundation with outlay of Rs 50,000 crore over 5 years.
- National Language Translation Mission to boost internet access.
- Deep Ocean Mission for ocean exploration and biodiversity conservation.

## SKILLING INITIATIVES

- **Rs 3,000 crore for realignment of existing National Apprenticeship Training Scheme (NATS)**
- Initiatives for partnership with other countries like UAE & Japan in skilling

## TAX PROPOSALS

- Exemption from filing income tax returns for senior citizens (75 years and above) who only have pension and interest income. The paying bank will deduct the necessary tax on their income.

- Reducing time limit for reopening of income tax assessment.
- Constitution of a Dispute Resolution Committee for small tax payers.
- Income Tax Appellate Tribunal to be made faceless
- Increase in limit for tax audit for persons who carry out 95% of their transactions digitally
- Dividend payment to REIT/InvIT to be exempted from TDS.
- Pre filling of returns will also cover capital gains from listed securities, dividend income, etc.
- Eligibility for claiming tax holiday for start-ups proposed to be extended by one more year

## INDIRECT TAX

- Rationalisation of customs duty structure by eliminating outdated exemptions.
- Rationalisation of duties on raw material inputs to manmade textiles.



# BUDGET GRANT ANALYSIS

For the upcoming financial year 2021-22, the grant for textile & clothing sector is budgeted at Rs. 3,631.64 crore which is about 10% higher than previous year's revised budget of Rs. 3,300 crores in 2020-21.

In the present budget, Government has emphasized mainly on Infrastructure Development and Research & Capacity Building as the grant for these sectors has been

increased by about 43.7% and 77.5% respectively as compared to the last year. Share of these sectors in total T&A budget allocation for 2021-22 stands at about 6% and 10% respectively.

This year, Government has reduced CCI fund allocation by about 84% and allocated Rs. 136 crores to CCI for procurement of cotton under price support scheme.

Allocation for jute industry has increased by 113.9% to reach Rs. 153.01 crore from Rs.71.53 crore during 2020-21.

In terms of percentage share, Silk Industry got the maximum allocation this year followed by Amended

Technology Upgradation Fund Scheme (ATUFS) with share of 24% (Rs 876 crore) and 19% (Rs 700 crore) respectively.

Detailed analysis of Demand of Grants for Textile Sector in Budget 2021-22 is given below:

### Analysis of Demand of Grants for Textile Sector in Union Budget 2021-22

Particular	2019-20 (Actual) (Rs Cr)	2020-21 (Revised) (Rs Cr)	2021-22 (Budget) (Rs Cr)	% Change (2021-22 to 2020-21)	% Share in total (2021-22)
Total-Establishment Expenditure of the Centre	77.95	92.11	102.00	10.7%	2.8%
Central Sector Scheme/Project					
Amended Technology Upgradation Fund Scheme (ATUFS)	317.90	545.00	700.00	28.4%	19.3%
Procurement of Cotton by Cotton Corporation under Price Support Scheme	2,017.57	865.00	136.00	-84.3%	3.7%
Total-National Handloom Development Programme	385.01	344.87	495.32	43.6%	13.6%
Total-National Handicraft Development Programme	282.16	275.90	357.50	29.6%	9.8%
Total-Integrated Wool Development Programme	16.50	10.00	16.50	65.0%	0.5%
Total-Development of Silk Textiles	787.61	650.00	876.00	34.8%	24.1%
Total-Development of Jute Industries	104.42	71.53	153.01	113.9%	4.2%
Total-Power loom Promotion Scheme	41.54	60.00	74.28	23.8%	2.0%
Textile Infrastructure					
Scheme for Integrated Textile Parks (SITP)	41.01	60.00	80.00	33.3%	2.2%
Integrated Processing Development Scheme	10.17	40.00	75.00	87.5%	2.1%
Others- Infrastructure	89.47	42.00	49.00	16.7%	1.3%
Total-Textile Infrastructure	140.65	142.00	204.00	43.7%	5.6%
Research and Capacity Building					
Integrated Scheme for Skill Development	72.07	80.00	100.00	25.0%	2.8%
National Technical Textile Mission	-	-	100.00		2.8%
National Institute of Fashion Technology (NIFT)	57.16	80.00	100.00	25.0%	2.8%
Others- Research & Capacity Building	20.44	41.16	57.00	38.5%	1.6%
Total-Research and Capacity Building	149.67	201.16	357.00	77.5%	9.8%
Total-North East Textiles Promotion Scheme	117.21	42.40	75.00	76.9%	2.1%
Total Central Sector Scheme/Project	4,360.24	3,207.86	3,444.61	7.4%	94.8%
Other Central Sector Expenditure	(10.09)	0.03	85.03	283333.3%	2.3%
Total Budget Allocation	4,428.10	3,300.00	3,631.64	10.0%	

Source: Budget Documents

## PRESS RELEASE

# CITI HAILS UNION BUDGET 2021-22 AS A STRONG FOUNDATION FOR FUTURE GROWTH OF THE T&C INDUSTRY

New Delhi, Monday, February 01, 2021: Shri T. Rajkumar, Chairman, CITI, welcomed the first digital-cum-paperless Central Budget presented today morning by the Hon'ble Union Finance Minister, Smt. Nirmala Sitharaman, in the Lok Sabha House of the Parliament. He stated that the budget has given major emphasis to healthcare and infra sectors and whole-heartedly appreciated the Government for taking care of the entire economy and the citizens of India during this Covid-19 pandemic. The world over India has received accolades for its effective handling of this unprecedented health crises.

Chairman CITI welcomed the announcement of setting up of seven textile parks within three years under the scheme Mega Investment Textile Parks (MITRA). The parks will be set up over 1,000 acres of land with world class infrastructure, and plug-and-play facilities. This will create world class infrastructure with plug and play facilities to enable create global champions in textile exports. He further stated that the Production Linked Incentive (PLI) Scheme for MMF Garments and Technical Textiles with a total outlay of Rs.10,683 crores will also help the textile industry to become globally competitive, attract large investments and boost employment generation. Moreover, to achieve the target of \$350 billion from the current size of \$167 billion our manufacturing sector has to grow in double digits on a sustained basis. Our manufacturing companies need to become an integral part of global supply chains, possess core competence and cutting-edge technology.

Shri T. Rajkumar pointed out that that the Government well recognises the fact that our textile industry significantly contributes to the Indian economy and creates huge employment opportunities to the masses especially to the poorer sections of the society majorly covering illiterate and down-trodden women. To further enhance this scope and achieve the target of making Indian economy a \$ 5-trillion economy by 2025, reduction of customs duty on caprolactam, nylon chips and nylon fiber & yarn to 5% is step in the right direction. This will bring nylon chain on par with polyester and other man-made fibers. He also welcomed rationalization of exemption on import of duty-free items as an incentive to exporters of garments, leather, and handicraft items. All these items are domestically produced in excellent quantity and quality by our MSMEs and help the textile industry and exports too.

At the same time, Chairman, CITI pinpointed that the levy of 10% import duty on cotton and cotton waste has come as a severe blow for the ailing cotton textiles and apparel industry. Cotton and cotton waste which is currently under nil rate of import duty is being subjected to 10% import duty through the budgetary announcement comprising of 5% Basic Customs Duty and another 5% Agriculture Infrastructure and Development Cess (AIDC) on cotton and 10% BCD on cotton waste. The new import duty comes into effect from 2nd February 2021.

## PRESS RELEASE...

CITI Chairman appealed to the Hon'ble Prime Minister to kindly consider the immediate withdrawal of the levy of 10% import duty on cotton and cotton waste to sustain the global competitiveness of Indian textiles & apparel industry and prevent job losses for several lakhs of people, prevent fall in the exports and also curb cheaper imports of value added products from the SAFTA countries like Bangladesh, Sri Lanka, etc.

Shri T. Rajkumar further stated that the levy of 10% duty will not benefit the cotton farmers as the normal import of 12 to 14 lakh bales per year accounts for only around 3% of Indian cotton production and consumption and such cotton is not produced in India. But this is essential to sustain the share of value added / niche markets of India both in global and domestic markets. He has added that after the introduction of BT cotton that accounts over 97% of the cotton produced in the country, the cotton textile industry has to import ELS cotton, organic cotton, contamination free cotton to the tune of 10 to 12 lakhs bales per year to meet the demands of the global customers and also the value added made-ups and apparel segments of domestic market. He has cautioned that the country is already flooded with cheaper imports of readymade garments from SAFTA countries and facing crisis.

Chairman CITI also welcomed the move of allowing women to work in all categories and also in the night-shifts with adequate protection, modified the definition of small companies: companies with a paid-up capital not exceeding 2cr & a turnover not exceeding 20cr are to be considered small companies, implementation of the 4 labour codes, minimum wages to all categories of workers, and all will be covered by the Employees State Insurance Corporation (ESIC) are welcome decisions for the upliftment of Indian economy.

Shri T. Rajkumar pointed out that in some of our major appeals we had requested to the Hon'ble Prime Minister to remove anti-dumping duty on VSF and bring uniformity in GST slab for MMF value chain to enable the MMF Sector to have a level playing field which has still remained unresolved and would keep on pitching for the same with the Government departments.

Chairman CITI concluded by saying that the outlined six pillars of proposals to strengthen the vision of Atmanirbharta, such as health and well-being, capital and infrastructure, inclusive development, reinvigorating human capital, innovation and R&D and minimum government and maximum governance will lay a strong foundation for the future growth of not only the Indian Textile & Clothing Industry but for the entire economy as well.

## CITI WELCOMES SHRI U.P. SINGH NEW TEXTILE SECRETARY



Shri U.P. Singh is a 1985 batch Indian Administrative Service Officer of Odisha Cadre.

He did his B.Tech and M.Tech in Mechanical Engineering from IIT, Kanpur. Held important assignments in both Central and State Governments and possesses rich and varied experience.

Presently Shri U.P. Singh is Secretary to Government of India, Ministry of Textiles. He was appointed as Secretary in the Ministry of Textiles, with effect from 27th January 2021.

He is responsible for the formulation of policy, planning, development, export promotion and regulation of the textile industry in India.

He joined the Ministry of Water Resources & River Development and Ganga Rejuvenation on 1.6.2016 as Additional Secretary and also held the post of Mission Director, National Water Mission (NWM). Later he assumed the charge of Director General, National Mission for Cleaning Ganga (NMCG) on 7.10.2016. He was appointed as Secretary in the Department of Water Resources, River Development & Ganga Rejuvenation, Ministry of Jal Shakti, w.e.f. 1.12.2017.

Prior to joining the Ministry of Water Resources, RD & GR he worked as Additional Secretary in the Ministry of Petroleum and Natural Gas. He has the experience of working in different sectors like Water Resources, Finance, Steel, Transport, etc.

As Secretary, Textiles he is deeply involved in policy formulation, planning and development of the Textiles Industry in India.

Interests and Hobbies of Singh include traveling, Hindi Literature, Music, Films and gardening.



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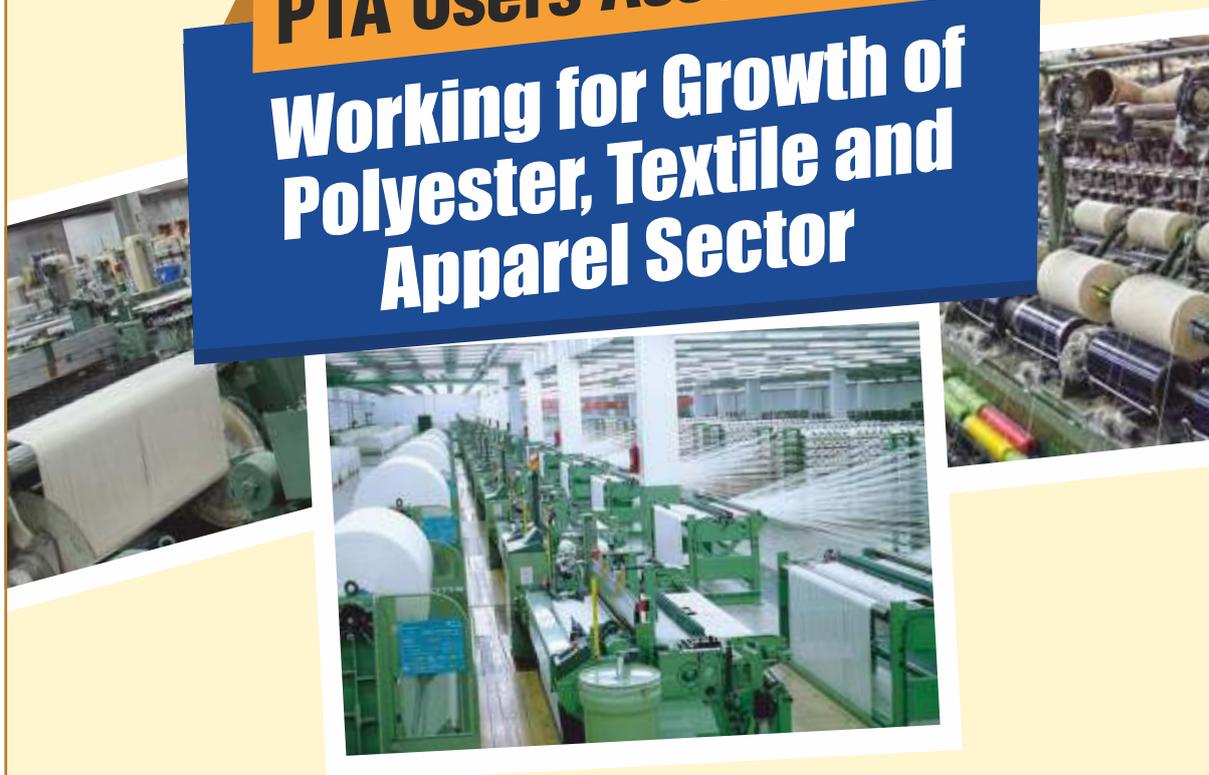
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For more information on CITI CDRA, please contact:

#### Cotton Extension Activities

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#### Contribution in CITI CDRA Corpus Fund

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