

Gujarat: The Growing Engine for Textile and Apparel Manufacturing



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Gujarat: The Growing Engine for Textile and Apparel Manufacturing



Vijay Rupani

Chief Minister, Gujarat State



apro/Ug/2019/01/15/dt

Dt. 15/01/2019

MESSAGE

The spectrum of Indian textiles is extremely diverse and its history is world-renowned. Textile is not just an industry, but also a tradition and a legacy which we present to the world through the magic of India's handicrafts and machines. In the growth of the textiles sector, lie the growth of India and the growth of job opportunities. The textile industry will have to constantly innovate and research for growth and to tap new markets. Based on Make In India, the textile industry is being infused with the mantras of 'skill, scale, speed' and 'zero-defect, zero-effect'.

Gujarat already has large spinning capacity; adding weaving and garmenting would make it possible to achieve the complete textiles and apparel value chain. **Government of Gujarat** aims to provide employment to women and create investment opportunities in the complete value chain from cotton to fabric to clothing. There are lots of opportunities in the Textile Sector as it is one of the highest employing sectors in India. Government of Gujarat is making all efforts to make Gujarat a major garment hub.

I compliment **ASSOCHAM** for bringing out this **Sectoral Report** covering an important segment of Indian Textile and Apparel Sector in partnership with **Wazir Advisors**. I am sure that the topics deliberated during the conclave will bring in fresh ideas for meeting the challenges ahead in this very important industry sector. I not only wish this conclave a great success but also assume that ASSOCHAM shall continue to organize such programs for sector benefit with a great degree of excellence.

(Vijay Rupani)

स्मृति ज़ुबिन इरानी
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MESSAGE

The Textiles and Apparel Sector, one of the oldest sectors in the Indian Economy is a significant contributor to its growth. Its contribution to output, foreign earnings and employment has been considerably large. The Industry is highly diverse, ranging from labour intensive handmade textiles to capital intensive sophisticated mills.

Government of India has taken several initiatives and announced a number of schemes for capacity building and integrated skill development for stakeholders of the textile and apparel sector. These schemes have been immensely beneficial for the Industry at large.

I compliment ASSOCHAM for bringing out this sectoral report covering an important segment of Indian Textile and Apparel Sector. I am confident that this report will be a useful contribution to national dialogue on the subject and add to the knowledge base for policy makers and academicians.

My best wishes to all the collaborators for success in this and future endeavours.


(SMRITI ZUBIN IRANI)



MESSAGE

The manufacturing sector is one of the key drivers of employment and growth of an economy. The 'Make in India' initiative of the Government of India is aimed at boosting manufacturing by facilitating investment, fostering innovation, enhancing skill development and protecting intellectual property rights.

India's textile and apparels industry is one of the mainstays of the national economy. It is also one of the largest contributing sectors to India's exports. Government support for modernization of the industry, with a particular focus on closing the gaps in the textile value chain, appears to be promising for the industry. Based on its cost-advantage, diverse traditions in textiles and robust supply chain, India is capable of delivering high quality value-added products across the world. It is imperative to build on this advantage, particularly in view of rising global competition and the changing trade scenario.

Modernization of textile units and up-gradation of technology are important for sustaining growth of the textiles and apparels industry. These measures will produce good quality output and also reduce cost of production. At a time when the government has initiated the 'Make in India' programme to revive Indian manufacturing, planned and systematic efforts by the government and industry bodies to support Indian textiles and apparels will give the necessary fillip to the industry and help it address various barriers to its growth, ultimately leading to economic prosperity.

Gujarat has a leadership position in textile sector. The state is the largest producer of cotton, denim and silk fabric. The state's proactive policies are the key growth drivers of this industry in Gujarat. On the occasion of the 9th edition of Vibrant Gujarat, I would like to extend my best wishes to the organizers, industry and participants. I see Vibrant Gujarat as a significant platform for industrial progress and contribution to socio economic development of our nation.

We are pleased to present the report '*Gujarat: The Growing Engine for Textile and Apparel Manufacturing*'. It offers new insights into how we can achieve high and sustainable growth in incomes and jobs to meet the demands of our young and growing population. I very much hope this paper would be useful to policy makers, people engaged in business and academia and help in fostering informed debate.



(Balkrishan Goenka)
President



MESSAGE

The textile industry in India traditionally, after agriculture, is the only industry that has generated huge employment for both skilled and unskilled labour in textiles. The textile industry continues to be the second-largest employment generating sector in India. There are a lot of opportunities in the Textile Sector as it is one of the highest employing sectors in India.

Gujarat has one of the most flourishing textile industries in the country and it was very truly said and called the Manchester of the East during the British era, and the Denim Capital of India. We want to make Gujarat once again a Manchester of the East and become number one in textiles.

I hope the **TEXTILE CONCLAVE** will provide a platform for the entire textile value chain to deliberate and develop a vision for Textile Industry with key focus on issues faced by Cotton Farmers, Women Empowerment, Youth employment opportunities and position Indian Textile Industry as pioneer in Environment friendly industry practices.

I congratulate Hon'ble Chief Minister of Gujarat and State Government for coming up with New Textile Policy which will boost Gujarat's textile sector to remain leading in global competitiveness.

I compliment ASSOCHAM for bringing out this sectoral report covering an important segment of Indian Textile and Apparel Sector in partnership with Wazir Advisors.

I congratulate ASSOCHAM and its organizing Team for conceptualizing the conclave of utmost significance to the Industry and also assume that ASSOCHAM shall continue to organize such programs for sector benefit with a great degree of excellence.

I wish the Conclave a great Success.

A handwritten signature in blue ink, appearing to read "Jaxay Shah".

(Jaxay Shah)

Chairman

ASSOCHAM Gujarat Chapter



MESSAGE

The Indian textile and apparel industry has huge growth potential in both domestic market as well as exports. India has large manufacturing capacities across the complete manufacturing value chain viz. natural and manmade fiber production, spinning, weaving, knitting, processing, garmenting, made-ups and technical textiles. The industry has grown significantly in the last few years and contributing enormously to industrial output, employment generation and earnings of the country.


The Government of India has taken several strategic steps to promote entrepreneurship and investments into the sector. Apart from Central Government schemes, several State Governments have also launched their textile and apparel policies, under which several incentives are provided for investments. Gujarat positions itself as one of the most competitive Indian states for textile and apparel businesses to establish, expand and operate. The recent announcement of a new scheme by the Government of Gujarat to strengthen the value chain and extend support to textile industry in the state is a progressive initiative.

However, in order to leverage the vast potential of this vibrant industry, it is critical for the Government and industry to work towards addressing key challenges including obsolete machinery and technology, raw materials shortage and lack of quality infrastructure in non metropolitan cities.

Our best wishes on the occasion of 'Textile Conclave' during Vibrant Gujarat Global Summit 2019 with the hope that economists, policy makers, regulators and other stakeholders associated with the industry will find this study useful and the deliberations at the Conclave will provide a certain roadmap for ongoing policy initiatives.

We would like to thank and extend our sincere appreciation to all the industry experts who have given their perspectives and helped in analyzing the factors involved in development of this sector.

We would welcome your suggestions and feedback.


(Uday Kumar Varma)
Secretary General

THE ASSOCIATED CHAMBERS OF COMMERCE AND INDUSTRY OF INDIA

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FOREWORD

The Indian textile and apparel industry, currently estimated at USD 139 billion, is poised to reach USD 300 billion by 2025. It is one of the major contributors to India's exports with approximately 13% of the total exports and is also the 2nd largest employer in the country. With abundant availability of raw materials such as cotton, wool, silk, jute, etc. and favorable macro-environment, India is a preferred destination for global retail brands. India, based on its cost-advantage, diverse traditions in textiles and robust supply chain, is capable of delivering high-quality packaged products across the world.

The Indian textile and apparel industry has huge growth potential in both domestic market as well as exports. On one side, the growth in per capita income and disposable income of the individuals is spurring growth in domestic market, on the other hand, China's reducing share in global trade is creating opportunity for countries including India. At such a juncture, it has become imperative for Indian textile & apparel industry stakeholders to adapt manufacturing excellence for growth. One of the key areas for achieving the sustainable growth would be strengthening the manpower asset i.e. focusing on skill development.

Skill development has been a challenge in the Indian textile and apparel industry owing to its labor intensive nature. As per Wazir analysis of Skill Gap in India, Indian apparel industry suffers losses of approximately 14% because of labor shortage in garmenting. Also, the training status in the industry reflects that only ~7% of the textile units impart up-skill training with maximum up-skilling training in the organized segments. It is hence, vital for the Indian textile and apparel industries to understand the need of training and up-skilling of the current workforce and take required measures.

In such a favorable market scenario, Gujarat positions itself as one of the most competitive Indian states for textile and apparel businesses to establish, expand and operate. Gujarat has been known as the "Textile State of India" as it contributes 28% in the manufacturing sector and significantly to the country's textile and apparel exports as well. The "Gujarat Garment & Apparel Policy" released by Government of Gujarat has further increased the attractiveness of the state. The following sections explain why Gujarat will be one of the growth engines for achieving the targeted growth of Indian T&A industry.

(Prashant Agarwal)
Jt. Managing Director
Wazir Advisors Pvt. Ltd.

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1. Global Textile and Apparel Market Overview

1.1. Global Apparel Consumption Scenario

The current global apparel market is estimated at US\$ 1.8 trillion, which forms nearly 2% of the world GDP of US\$ 79.3 trillion. Apparel consumption in top 8 economies constitutes approximately 70% of the global consumption. The apparel market is still largely dominated by the EU & USA, with a cumulative share of 42% whereas they are home to ~11% of the world population implying a very high level of Per Capita Expenditure on Apparel (PEAP) compared to rest of the world. The next biggest markets are China, Japan, India and Brazil, in descending order with a cumulative share of approximately 24%. It is projected that domestic apparel market size for India and China will be seeing a growth in double digit from 2017 to 2025.

Table 1: Global Apparel Market Size (US\$ Bn.)

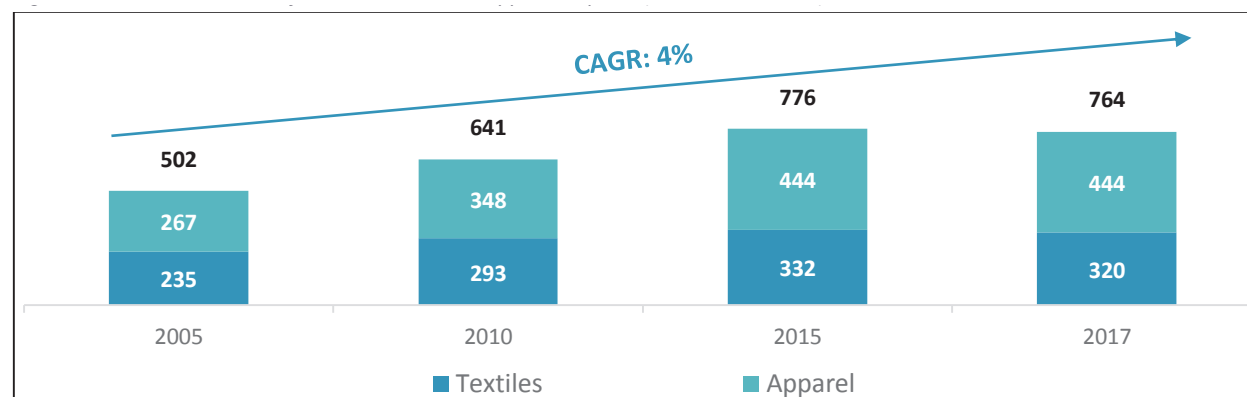
Country/region	Value 2017	Share 2017	Value 2025 (P)	Share 2025 (P)	CAGR
EU-28	417	23%	435	17%	1%
USA	341	19%	389	15%	2%
China	210	12%	500	20%	11%
Japan	99	5%	109	4%	1%
India	67	4%	160	6%	11%
Brazil	61	3%	94	4%	6%
Russia	41	2%	39	2%	-1%
Canada	32	2%	37	1%	2%
RoW	550	30%	794	31%	5%
Total	1,816		2,557		4%

Data Source: Published Data and Wazir Analysis

1.2. Global Textile & Apparel Trade

Global textile and apparel trade in 2017 was US\$764 bn, which has been increased overall at a CAGR of 4% since 2005, despite year wise fluctuations in demand.

Figure 1: Historical Growth of Global Textile and Apparel Exports (Values in US\$ Bn.)

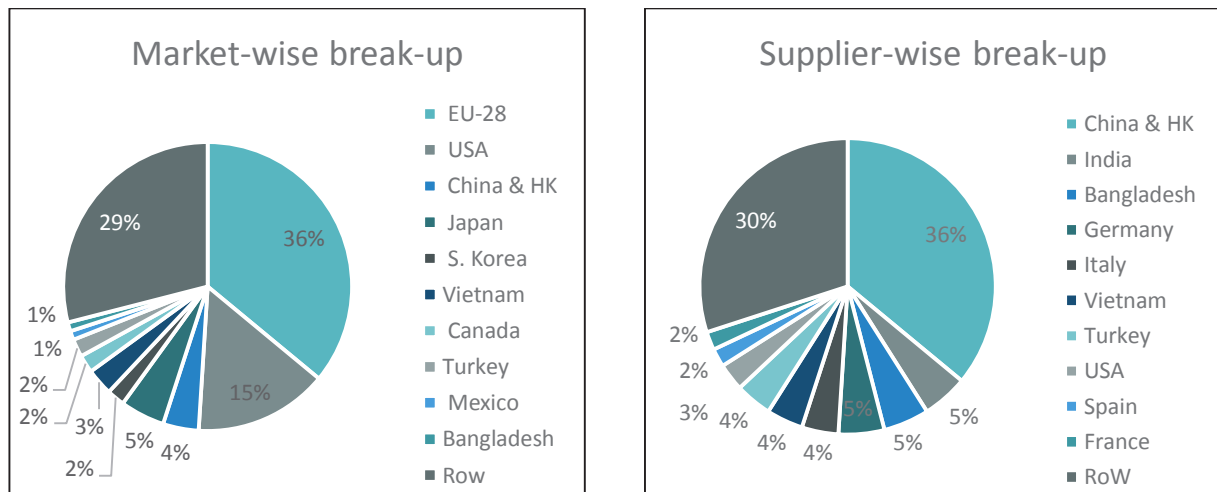


Data Source: UN Comtrade

Major Exporting and Importing Nations

EU and USA are the largest markets for textile and apparel with a share of 36% and 15%, respectively. The top 5 markets constitute around 60% of the global imports. On the supply side, China dominates the global trade of textile and apparel with a share of 36% remotely followed by India at 5%.

Figure 2: Share of Major Markets and Supplier Nations in Global Trade (Analysis as per 2017 data)



Data Source: UN Comtrade and Wazir Analysis

1.3. Trends in the Global Textile Value Chain

Growing Domestic Market of India and China

It is expected that over the next decade, domestic apparel market of India & China will attain high growth rates of 11% each, to add a cumulative market size of US\$ 393 bn. by 2025.

Table 2: Market Size Growth of India & China (US\$ Bn.)

Markets	2017 Market Size	Expected Growth Rate (2017 -2025)	2025 Market Size	Market Addition by 2025
India	67	11%	160	93
China	210	11%	500	290
India & China	277		660	393

Data Source: Wazir Analysis

High economic growth will be a major factor behind increasing apparel market size in both these countries.

Other trends facilitating the growth in India are increasing youth population and high purchasing power, shift from need- based purchase to aspiration- based purchase, growing urbanization increasing the market demand, increased penetration of technology and greater access to internet resulting in significant growth in online retail sales.

Trends which will catalyze growth in Chinese market demand are boosting demand of outdoor wear and fast fashion categories, end of the one-child policy fostering demand of kid's wear segment, gradual increase in spending of Chinese customer from offline to online retail channel.

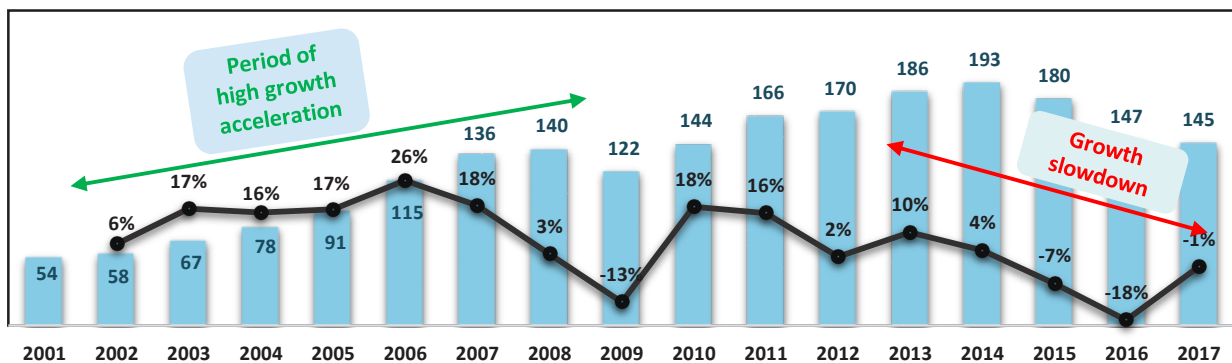
Growth in retail front will lead to a trickle-down effect in the local manufacturing value chain benefitting national manufacturers the most. Huge growth will make domestic market more attractive than exports in many cases for manufacturers.

Slower Expected Export Growth of China

China dominates the global apparel trade with a share of approximately 34%. However in the recent years, a continuous decline in China's textile and apparel exports has been observed. Between 2014 and 2017, apparel exports from China reduced by ~33% to reach a level of US\$ 145 bn (2017). Also, the overall share of China in global textile and apparel has fallen from ~39% share in 2013 to a current ~34%.

In future, China's share is expected to further reduce because of gradual shift of global buyers from China due to rising manufacturing costs in China and availability of other lower cost destinations in the region. Apart from this, China is also shifting from a cost driven to innovation driven manufacturing destination. Also the focus of Chinese manufacturers is expected to increase towards their fast growing domestic market. While China's exports will continue to grow, its global share is likely to reduce and this is expected to create export market vacuum of around US\$ 50 bn by 2025.

Figure 3: Slowdown in China's Export Growth (Export values in US\$ Bn.)



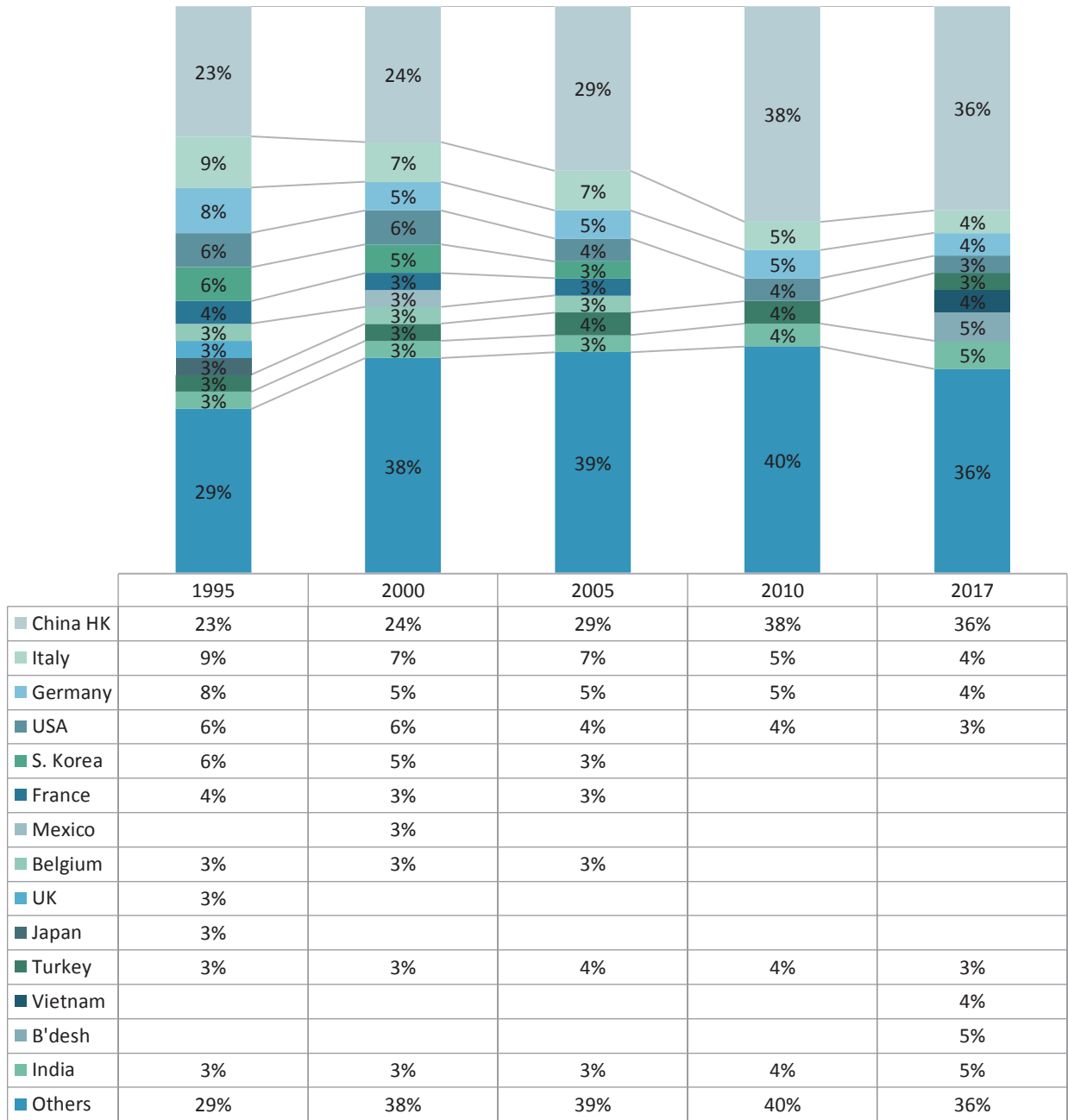
Data Source: UN Comtrade

China's loss of share in global apparel trade will throw up opportunities for emerging exporters including Vietnam, Ethiopia, Kenya, Myanmar, Bangladesh and India.

Increasing Consolidation of Global Sourcing

From 1995 to 2017, there are only fewer countries left, which are having some significant share in total trade. This implies that buyer is now seeking for long term arrangement with fewer suppliers.

Figure 4: Increasing Consolidation of Global Sourcing



Data Source: UN Comtrade

These trends favor India as a textile and apparel manufacturing and sourcing destination for global markets and hence provide good opportunity for Indian textile and apparel companies to take advantage of the huge opportunity.

2. Indian Textile and Apparel Market Overview

2.1. India's Manufacturing Scenario

India has large manufacturing capacities across the complete manufacturing value chain viz. natural and manmade fiber production, spinning, weaving, knitting, processing, garmenting, made-ups and technical textiles.

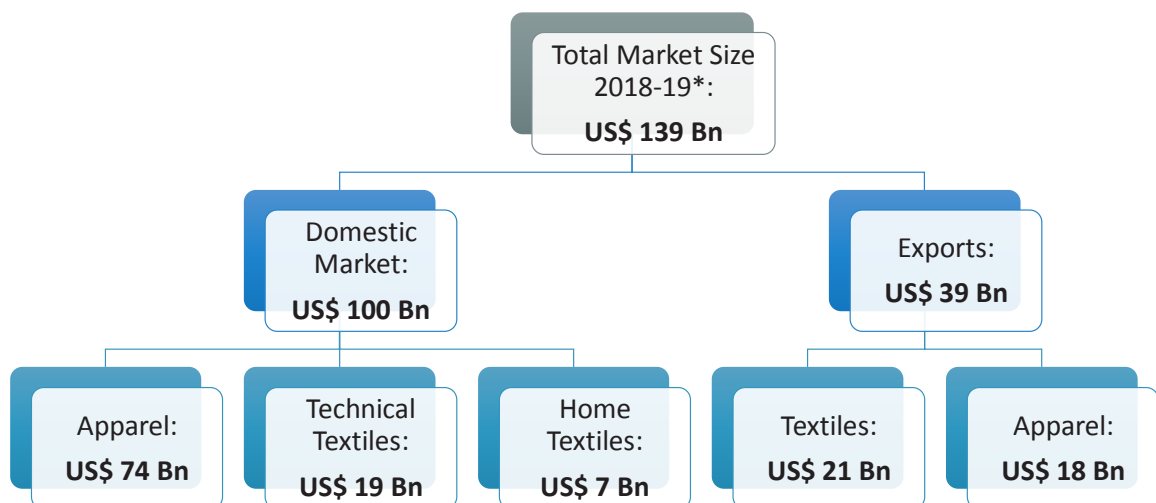
Table 3: India's Textile and Apparel Production

Commodity	Production (2013-14)	Production (2017-18) (P)	CAGR (2017-18)
Fiber (Mn. kg)	9,851	9,321	-1.4%
Natural Fiber	8,544	8,002	-1.6%
Manmade staple fiber	1,307	1,319	0.2%
Yarn (Mn. kg)	6,602	6,863	1.0%
Spun yarn	5,309	5,676	1.7%
Manmade filament yarn	1,293	1,187	-2.1%
Fabric (Mn. sq. m)	63,500	67,455	1.5%
Woven fabric	46,451	49,785	1.7%
Knitted fabric	17,049	17,670	0.9%
Garments (Mn. pcs)	12,600	18,500	10.1%
Made-ups (Mn. kg)	1,800	2,100	3.9%

Data Source: Office of Textile Commissioner and Wazir Analysis

Indian textile and apparel sector has double advantage of being export competitive as well having large domestic consumption which is growing. Indian textile and apparel market is currently estimated at US\$ 139 Bn. The domestic consumption of textiles and apparel constitutes approximately 70% of the total market size while exports constitute the rest 30%.

Figure 5: Indian Textile and Apparel Market 2018-19 (US\$ billion)



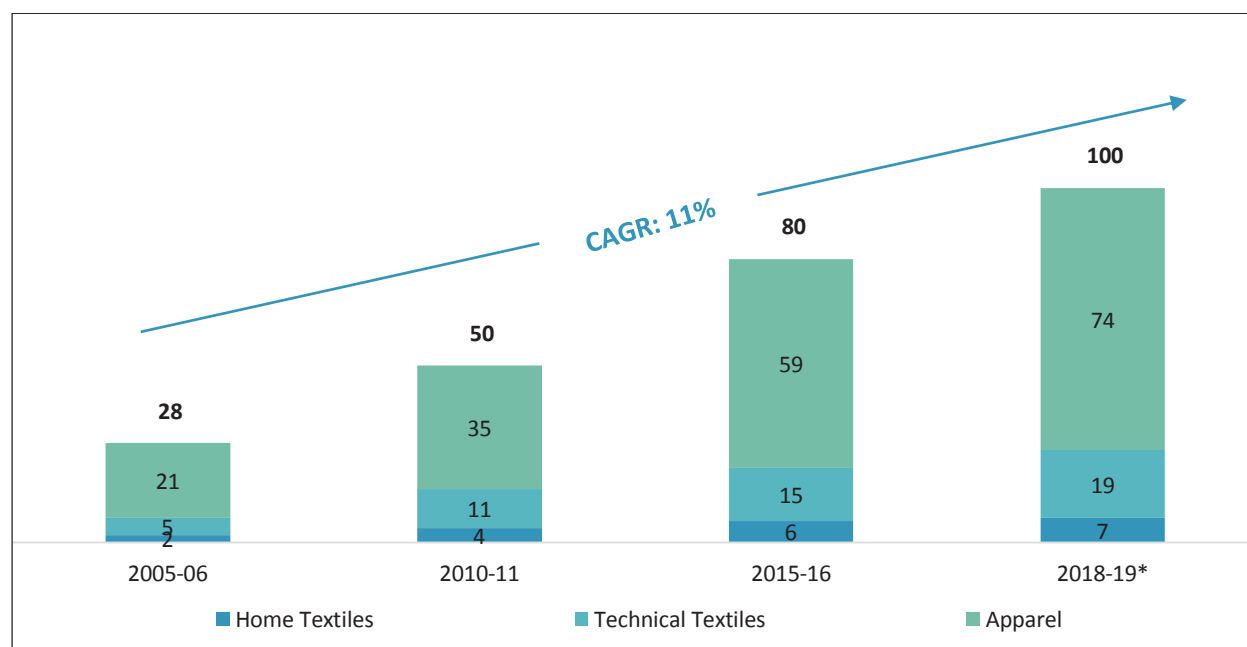
Data Source: Ministry of Textiles, DCGI&S & Wazir Analysis

* Estimated

2.2. Domestic Market Scenario

The current domestic textile and apparel market is estimated at US\$ 100 billion, with apparel having ~75% share. With growth of disposable income, favorable demographics and changing lifestyle, consumption of products and services is expected to grow continuously in the foreseeable future, including textiles and apparel.

Figure 6: Indian Textile and Apparel Market Size (US\$ billion)



Data Source: Ministry of Textiles and Wazir Analysis

* Estimated

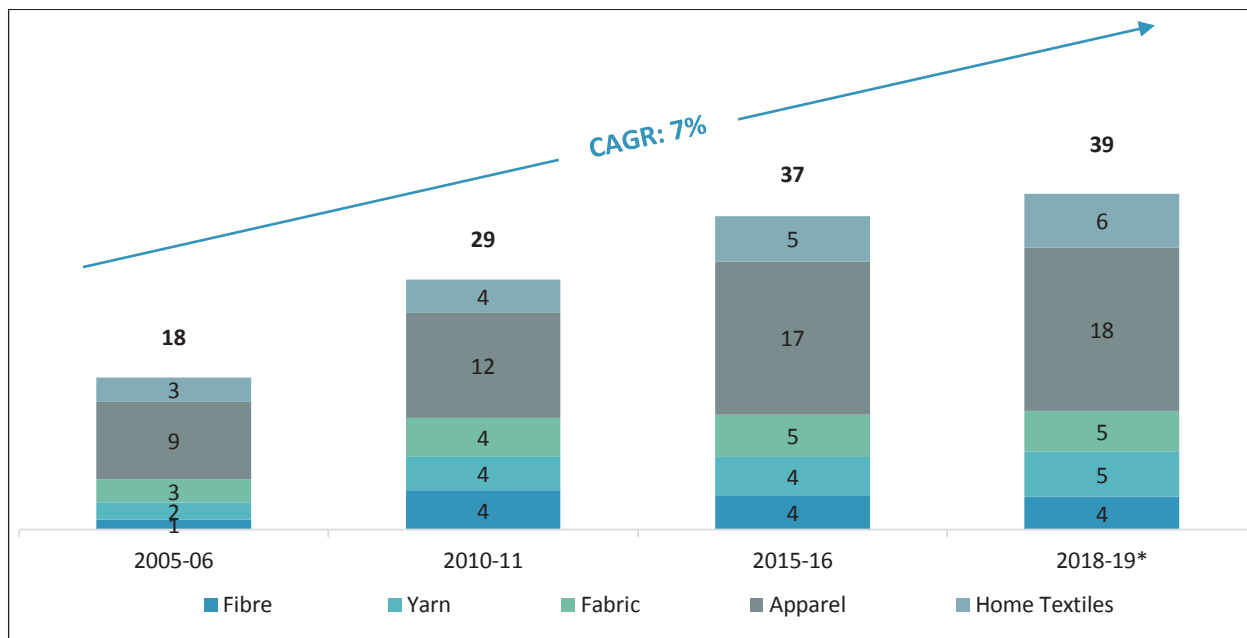
Indian consumers' affinity towards brands and organized retailing is increasing, which is helping the consumption growth of all products, including textile and apparel. Organized retailing in India currently stands at only 10% of the overall retail market of US\$ 815 Bn. Within this, apparel has a share of approximately 35%. With growth of disposable income, favorable demographics, changing lifestyles and a high potential for penetrating non-urban metro markets; the share of organized markets in India is expected to reach 31% by 2025. India is also witnessing growth of its aspiring middle class who tend to seek value and consume premium products. This shift in number of households within different income brackets will improve the consumption of products and services, which will definitely include textile and apparel as a lifestyle choice to enhance fashion. The vast population base and growing economy has caused global retailers and brands to enter the Indian market, either on their own or through local partners.

2.3. Exports Scenario

In terms of global ranking, India is ranked 2nd in textile export with 6% share and 5th in apparel export with 4% share. Overall, India holds second position with 5% share of global exports. India's textile and apparel exports were estimated at US\$ 39 billion in 2018-19 and

have grown at 7% CAGR since 2005-06. Availability of raw material, skilled manpower and favorable central & state government schemes would further help Indian exporters increase their market share and global competitiveness.

Figure 7: Indian Textile and Apparel Trade (US\$ billion)



Data Source: DGCI&S and Wazir Analysis

* Estimated

2.4. Central Government Support

Various schemes like Technological Up gradation Fund Scheme (TUFS), Scheme for Integrated Textile Parks (SITP), cluster development and others have been launched for promoting investments in the textile industry, upgrading technology and setting up integrated manufacturing set ups. Apart from this, support is provided to the industry through export promotion schemes/incentives like Merchandise Exports from India Scheme (MEIS), Market Development Assistance (MDA), Duty drawback etc.

Table 4: Central Government Schemes for Textile Sector

Scheme / Policy	Key Features
ATUFS	<ul style="list-style-type: none"> 15% capital subsidy on eligible machinery in garmenting and technical textile sector with a cap of Rs. 30 Cr. per individual entity. Additional incentive of 10% for the installation of benchmarked eligible machinery total cap of Rs. 50 crores (Rs. 30 crores for 15% CIS and Rs. 20 crores for additional 10% CIS) 10% capital subsidy on eligible machinery in weaving for brand new shuttle less looms (including weaving preparatory and knitting), processing, jute, silk and handloom sector with a cap of Rs. 20 Cr. per individual entity

Scheme / Policy	Key Features
	<ul style="list-style-type: none"> 15% capital subsidy on eligible machinery for composite units with a cap of Rs. 30 Cr. per individual entity (*if the eligible capital investment in respect of garmenting and technical textiles is more than 50% of the project cost) 10% capital subsidy on eligible machinery for composite units with a cap of Rs. 20 Cr. per individual entity (*if the eligible capital investment in respect of garmenting and technical textiles is less than 50% of the project cost)
Scheme for Integrated Textile Parks (SITP)	<ul style="list-style-type: none"> <i>Grant/Equity up to 40% of the textile park development project cost subject to a ceiling of Rs. 40 Crores.</i> <i>GOI support under the Scheme will be generally in the form of grant to the SPV unless specifically decided by the PAC to be equity. However, the combined equity stake of GOI/State Government/State Industrial Development Corporation, if any, would not exceed 49%.</i> <i>Grant at 90% of the project cost subject to a ceiling of Rs. 40 Crores for first two projects in the States of North East Region of India.</i>
Integrated Skill Development Scheme (ISDS)	<ul style="list-style-type: none"> Assistance up to 75% of the cost of the project, within an overall ceiling of Rs. 10,000 per trainee.
Integrated Processing Development Scheme (IPDS)	<ul style="list-style-type: none"> Grant up to 50% of the project cost (excluding land cost) with a ceiling of Rs. 75 Crores for projects with Zero Liquid Discharge Systems and Rs. 10 Crores for projects with conventional treatment systems. Support for marine discharge projects would be analyzed on a case to case basis with a maximum ceiling of Rs. 75 Crores. The project cost shall be borne by the Center, State, Beneficiary, Bank loan in the ratio of 50:25:15:10 respectively.
Merchandize Exports from India Scheme (MEIS)	<p>Rewards for export of products shall be payable as percentage of realized FOB value:</p> <ul style="list-style-type: none"> For handloom, jute and coir based products - reward rate is 5% for all countries For all other eligible textile categories, the reward rate is 2% and for apparel, it is 4%
Duty Drawback	<p>Drawback rates for key textile and apparel categories:</p> <ul style="list-style-type: none"> Cotton yarn: 1.3% to 1.7% Cotton fabric: 1.4% to 2.6% Apparel: 1.8% to 2.9%
Rebate on State Levies (ROSL) Scheme	<p>Provision of remission of State Levies on export of garments. The amount will be calculated on the F.O.B value The ROSL rate for apparels is– 1.4% to 1.7%</p>

Scheme / Policy	Key Features
Market Development Assistance (MDA)	Financial support to exporters for conducting export promotion activities abroad
Market Access Initiative (MAI)	Financial assistance for carrying out marketing projects abroad

Apart from Central Government schemes, several State Governments have also launched their textile and apparel policies under which several incentives are provided for investments in textile sector. Some of the attractive existing subsidies provided by states are listed below:

Capital Subsidy on Plant & Machinery
Jharkhand
 20% of investments up to Rs.50 Cr.

Credit Linked Interest Subsidy
Gujarat
 7%

Power Subsidy
Jharkhand
 100% duty exemption; 50% power tariff re-imburement for 7 yrs.

Stamp Duty Reimbursement
Maharashtra, Jharkhand and Orissa
 100% exemption

VAT/ Entry Tax Reimbursement
Jharkhand
 100% VAT refund for 7 yrs., 40% for next 3 yrs.

Skill Development/Training
Jharkhand
 Rs 13,000 per trainee

EPF/ESI Reimbursement
Orissa
 100% reimbursement for 5 years

Employment Cost Subsidy
Jharkhand
 Rs. 5,000/month/worker for 7 yrs.

2.5. Trends in the Indian Textile Value Chain

As mentioned in the previous section, domestic textile and apparel market of India is large and it has grown at a robust pace over the last decade. This market is expected to grow at an even higher pace in the coming years owing to the following growth drivers:

- **Changing Demographic Dividend**

India has the largest youth population in the world and as this population joins the workforce, gets more money in their hands, their spending power will increase. Apparel category will be the prime beneficiary of this increase in purchasing power. Also, since 2000s, India has witnessed a demographic shift in terms of increase in the urban population. Urban areas are expanding and large number of people are moving from villages to cities. This increasing urbanization in turn will have a major growth impact on apparel consumption.

- **Increasing Consumer Prosperity**

Over the last decade, India's per capita income has grown from US\$ 749 in 2005 to US\$ 1,723 in 2016¹. The growing income of people in the country has reflected in the increase of aspirational buying. Nowadays people are becoming more fashion conscious and are spending more on clothing. Judging by the GDP growth of the country, this trend is expected to rise in the coming years.

- **Emerging Categories for Consumption**

Increasing spending power of people along with the changing social scenario of the country has led to the emergence of certain new consumption categories in India such as active wear, sportswear, women's wear, protective wear etc. These categories have emerged substantially only in the last five to six years and they are expected to attain high growth in the coming years

- **Increasing Penetration of Organized Retail**

India has become a very attractive and large market for international brands owing to the above mentioned features. Many top international fashion brands such as H&M, Zara, and Aeropostale etc. have entered in the Indian market in the recent years. The presence of top brands in the country will lead to higher consumption of fashion apparel.

- **Growth of Technical Textiles**

Technical textiles is one of the most promising segments of the industry. Technical textile is expected to become of the fastest growing segments in the industry based on the following factors:

- a. **Growth of end use industries such as medical industry, automobile industry, protective wear industry, construction industry etc.**

¹ GDP per Capita at Current Prices – World Economic Outlook Database, 2017 (IMF)

- b. **Increasing consciousness of health, hygiene & safety amongst consumers**
- c. **Introduction of regulatory norms such as mandatory usage of seatbelts & airbags in automobiles, flame retardant fabrics in commercial places, use of geotextiles for construction etc.**

On the export front also, there are several trends which indicate a bright future for Indian textile and apparel industry which are given below:

- **Slowdown in China’s exports**

In the recent years, China’s growth in the global textile and apparel trade has slowed down. Chinese exports of textile and apparel have shown de-growth continuously for the last three years. This slowdown in growth is expected to remain over the next decade which will result in reduction of China’s share in the global textile and apparel trade in the coming years. This reduction in China’s share will serve as an opportunity for the competing nations to increase their share in the global trade by filling it. Textile manufacturing nations like Vietnam, Ethiopia, Kenya, Myanmar, Bangladesh and India etc. have an opportunity to fill this gap. As compared to all the nations mentioned above, India is the largest and more resourceful country which has the capability to take maximum advantage because of its huge textile base, manpower availability and infrastructure.

- **Increasing exports to USA**

USA is one of the biggest market for India’s export of textile & apparel products. In 2017, 21% of the textile and apparel products exported from India were shipped to USA. Apparel and home textiles occupied almost 87% share of the US\$ 7.9 Bn exports to USA.

Table 5: T&A Exports from India to USA (US\$ Mn.)

Categories	2013	2014	2015	2016	2017	CAGR (%)
Fiber	98	79	84	117	121	5
Filament	27	28	37	30	33	5
Yarn	74	68	61	53	53	-8
Fabric	311	307	320	321	345	3
Apparel	3,661	3,586	3,774	3,820	3,880	1
Home Textiles	2,719	2,631	2,821	2,786	2,853	1
Others	339	333	338	411	501	10
Total	7,229	7,033	7,436	7,538	7,786	2

Data Source: UN Comtrade

3. Gujarat's Textile and Apparel Sector

3.1. Manufacturing Scenario

Fibre Production

Gujarat is the largest cotton producing state in India accounting for around 28% share in India's total cotton production. It is followed by Maharashtra and Telangana representing 26% and 20% share in production, respectively. Gujarat's production of raw cotton has increased at a CAGR of 0.5%. The production of man-made fibres has increased from 597 million kgs in 2012-13 to 626million kgs in 2016-17 registering a positive growth of 1.2%.

Table 6 : Cotton and Man-made Fibre Production in Gujarat over last 5 years

(In Million Kg)	2012-13	2016-17 (P)	CAGR
Raw cotton	1,581	1,615	0.5%
Man-made fibre	597	626	1.2%

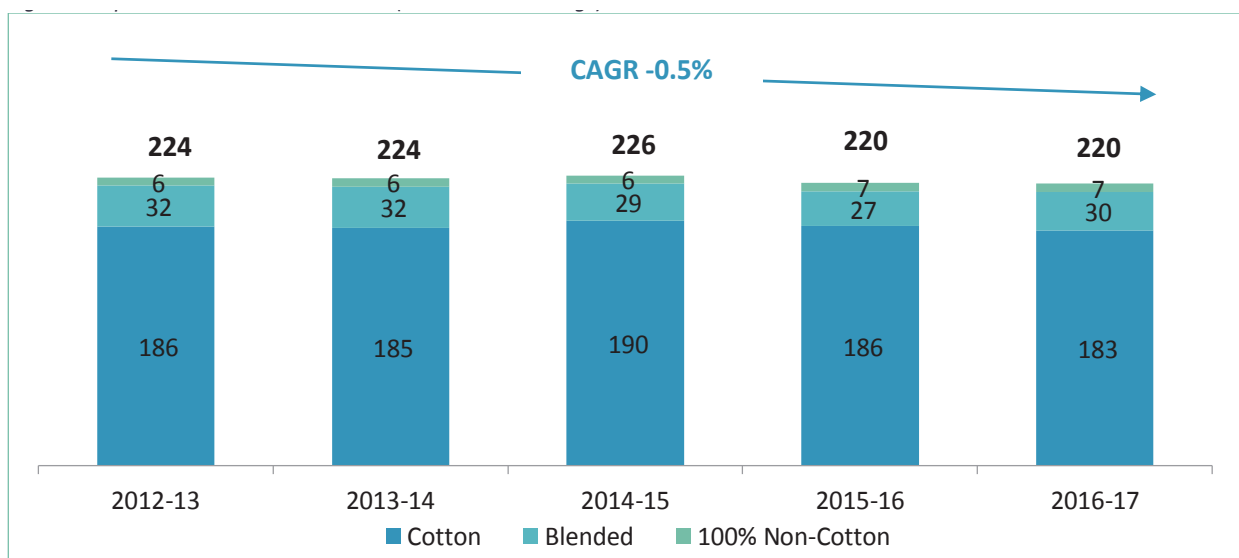
Data Source: Office of Textile Commissioner

Spun Yarn Production

Gujarat is one of the leading spun yarn producing state in India. Though over the years, the production of spun yarn in Gujarat has been stagnant.

Cotton has dominated spun yarn production accounting for around 83% share followed by blended and 100% non-cotton categories accounting for 14% and 3% share, respectively in 2016-17.

Figure 8 : Spun Yarn Production in Gujarat (values in million kgs)

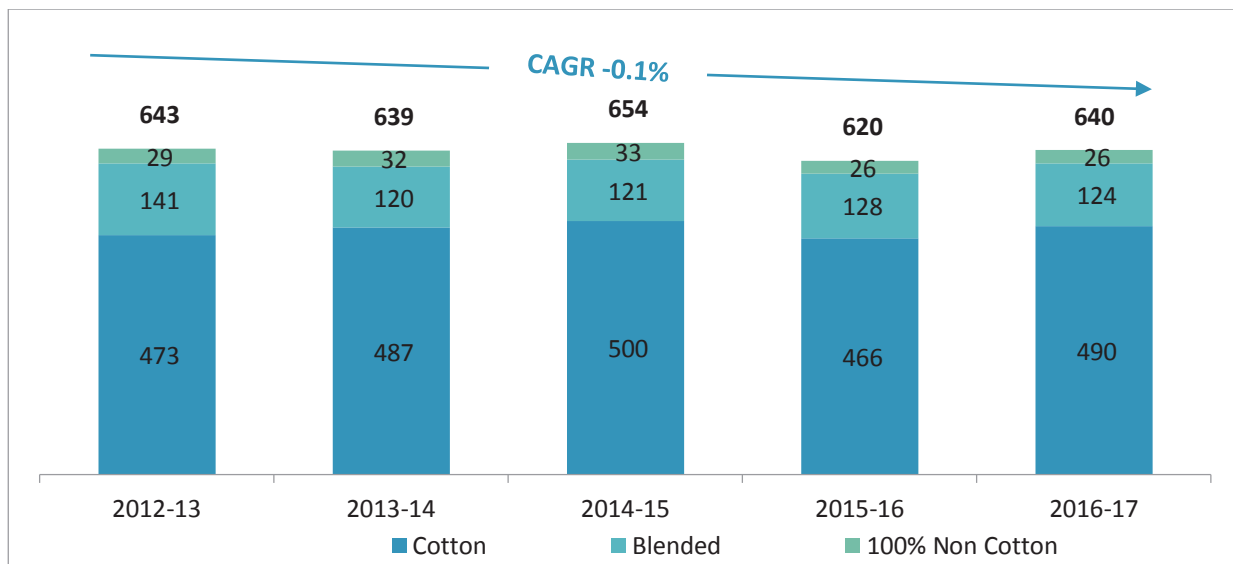


Data Source: Office of Textile Commissioner

Fabric Production

Gujarat's fabric production has remained almost stagnant in last 5 years. Over the years, cotton fabrics have dominated this segment accounting for around 76% share in total production. This is followed by blended and 100% non-cotton categories accounting for 20% and 4% share in total production.

Figure 9: Fabric Production in Gujarat (In Million Sq. Meters)



Data Source: Office of Textile Commissioner

3.2. Exports Scenario

Gujarat is one of the leading textile and apparel exporter from India. Gujarat's textile and apparel exports stood at US\$ 4.79 bn in 2014-15, which has remained almost stagnant since 2012-13. It is noteworthy to mention that Gujarat's apparel exports has grown at an impressive 55% CAGR from US\$ 162 mn. in 2012-13 to US\$ 297 in 2014-15.

Table 7 : Gujarat's Textile and Apparel exports (Values in US\$ million)

Export category	2012-13	2013-14	2014-15	CAGR
Textiles	4,650	5,158	4,495	-1.7%
Apparel	162	182	297	35%
Total	4,812	5,339	4,792	-0.2%

Data Source: DGCI&S

3.3. Manufacturing Infrastructure

Existing Textile Parks

The details of the textile parks that are currently operating in Gujarat are listed below:

Table 8: Existing Textile Parks in Gujarat

S.No	Name	Location	Activities
1	Amitara Green Hi- Tech Textile Park Pvt Ltd.	Kheda	Spinning, weaving and garmenting
2	Fairdeal Textile Park Pvt Ltd.	Surat	Weaving, Yarn Preparatory, Texturizing, Technical Textile & Composite
3	Gujarat Eco Textile Park Ltd.	Surat	Textile Processing, Weaving, Yarn Dyeing, Composite Denim
4	Karanj Textile Park Private Limited	Surat	Weaving and Knitting
5	Kejriwal Integrated Textile Park Pvt Ltd	Surat	Texturizing, Spinning, Weaving/Looms, Embroidery Units etc.
6	Mundra SEZ Integrated Textile and Apparel Park Pvt Ltd	Mundra	Technical Textiles - Woven, Non-Woven (Geo Textiles, Medical Textiles, Automotive Textiles, etc.), Garmenting
7	Palsana Textile Park Pvt Ltd.	Surat	Weaving, Technical Textiles, Garmenting, Textile Processing and Embroidery
8	RJD Integrated Textile Park Ltd.	Surat	Weaving-Water jet Loom, Weaving-HS, Rapier Loom, Weaving-LS, Rapier Loom, Composite, Texturing Embroidery
9	Sayan Textile Park Ltd.	Surat	Weaving, Embroidery, Texturizing, Garmenting, Technical Textile, Digital Printing
10	Shanti Integrated Textile Park Pvt Ltd.	Surat	Spinning, weaving and garmenting
11	Vraj Integrated Textile Park Ltd.	Kheda	Knitting, Weaving, Technical textiles, Textile packaging, Rope dyeing

Upcoming Textile and Apparel SEZs and Integrated textile parks

Several textile parks have been proposed to be set up in Surat, Sanand, Jungarh, Mangrol, Ahmedabad and Kheda along with dedicated textile and apparel SEZ planned to be developed in cities of Ahmedabad, Surat and Kutch.

Table 9: Upcoming textile parks in Gujarat

S.No	Textile Park	Location	Proposed Activities
1	Soham Integrated Textile Park Ahmedabad Ltd	Ahmedabad	Textile Processing Activities

S.No	Textile Park	Location	Proposed Activities
2	Pasana Village Crossing, Ahmedabad Mumbai Highway	Surat	Infrastructure & Plots for Weaving, Embroidery & Processing
3	Baroda Rayon Corporation	Surat	Weaving & Allied Industry
4	Devarshi Textile Park Consortium Pvt Ltd, Ichhapur, GIDC	Surat	Weaving & Allied Industry
5	Rudraksh Project Management Pvt Ltd, Ichhapur, GIDC	Surat	Weaving, Knitting, Embroidery & Allied Industry
6	Sanand-Viramgam Highway	Sadana	Weaving of High Value Sheeting Textiles & Technical textiles
7	Main Bypass Highway, Veraval	Junagadh	Spinning, Weaving, Knitting, Knit-process and Stitching
8	Surat Super Yarn Park Ltd	Mangrol	Texturized Yarn Manufacturing Activities
9	Mundra Infrastructure Pvt Ltd, Ichhapur, GIDC	Surat	Weaving and Allied Industry

Table 10 : SEZs space for textile industry

S.No	SEZs Space for Textile	Location	Sector/ Size
1	Ahmedabad Apparel Park	Ahmedabad	Apparel/ 38 Hectare
2	Pradip Overseas Limited	Ahmedabad	Textile/ 110 Hectare
3	Jindal worldwide Limited	Ahmedabad	Textile/ 101 Hectare
4	Surat Apparel Park	Surat	Apparel/ 57 Hectare
5	Mundra Integrated Textile and Apparel Park	Kutch	Textile/ 116 Acre

4. Five Reasons to Invest in Gujarat

4.1. Strong Government Support

The Gujarat Government has introduced a dedicated policy “**Gujarat Garment & Apparel Policy 2017**” for the support of Garment & Apparel Industries in Gujarat. The policy aims at creating 100,000 new jobs, generating additional exports and attract investment in apparel sector over the next five years. Any enterprise with at least 150 new machineries (Cutting & Sewing) with a minimum of 300 employees can apply for availing benefits under the scheme. The highlights of the policy are as follows:

Table 11: Gujarat Garment & Apparel Policy 2017

S.No	Type	Quantum of Assistance
1	Credit-linked interest subsidy	<ul style="list-style-type: none"> 5% per annum subject to a maximum of Rs. 7.5 Cr. per year for 5 years Eligible investment-Land, Building and Plant and Machinery
2	Power subsidy	<ul style="list-style-type: none"> Subsidy @ Re.1/unit for 5 years from date of commencement of commercial production In case of expansion, subsidy will be provided only for the additional facilities
3	Payroll assistance	<ul style="list-style-type: none"> For new apparel units having minimum 150 machines and generating at least 300 domicile jobs, payroll assistance of 50% of wages will be provided up to Rs 4000/- for female and Rs. 3200/- for male worker per month for 5 years In case of expansion, above incentives will be available only for additional workers. Minimum machineries and job generation remain same (150 and 300, respectively)
4	Plug and Play Systems	<ul style="list-style-type: none"> GIDC will develop readymade sheds (along with adequate support infrastructure) for apparel factories in selected locations and provide them on long term lease or rental basis GIDC will be provided with 50% assistance of project cost, which will be passed on to enterprises on pro rata basis
5	Dormitories	Assistance to GIDC <ul style="list-style-type: none"> GIDC will develop dormitories in selected locations and provide them on rent (minimum lock in 10 years) or long term lease basis Dormitories to be operated by leasing entity itself GIDC will decide nature of dormitory, rentals etc. on case to case basis State government will provide rent assistance of 50% to enterprises
		Assistance to private developers (individual units or parks) <ul style="list-style-type: none"> 50% project cost subject to a maximum of Rs 5 Cr. Dormitories to be developed for min 250 workers with a max built up area of 50 sq. ft./ person
6	Skill development / training	Setting up of training institution <ul style="list-style-type: none"> Assistance up to 85% with a ceiling of Rs. 3 crore of the project Eligible investment- Building, equipment and machinery (including installation), electrification, furniture, etc. excluding land cost
		Setting up of training centers <ul style="list-style-type: none"> Assistance of 50% subject to a maximum of Rs. 20 lakhs per center Eligible investment- Equipment and machinery, electrification and necessary furniture

S.No	Type	Quantum of Assistance
		Reimbursement of tuition fee to trainees for apparel production courses <ul style="list-style-type: none"> 50% of total fee charged by institution subject to a limit of up to Rs. 7,500 per trainee (Rs 10,000/- for middle level management courses)
7	Mega apparel park	<ul style="list-style-type: none"> Up to 50% of the total cost of the project with a maximum limit of Rs. 10 crore 100% stamp duty exemption only once, for developer and first purchaser of individual unit Park must accommodate a minimum of 20 apparel units with 150 machines each Developer needs to hold at least 20% equity participation in project

4.2. Availability of Raw Material

Gujarat is the top cotton producing state with a production of 1,615 mn. Kg of cotton in 2016-17. Approx. 28% of the total cotton produced in India comes from Gujarat and Gujarat exports 60% of the fibre from India. Surendranagar, Jamnagar, Rajkot, Bhavnagar and Amreli are the main cotton producing district. Cotton production is also supported by its climatic and geographical conditions as the state has black soil mixed with lime and potash and ~50 cm rainfall that are optimum for cotton cultivation.

It is also India's second largest producer of cotton fabrics with production totaling 490 million meters per annum. The state contributes 25 per cent to the country's textile manufacturing output, 12 per cent to textile exports and also houses the highest number of medium and large fabric processing units which number over 600. Ahmedabad is known as the 'Denim Capital of India'. Gujarat produces 65 per cent of the denim fabric in the country, while its textile market is estimated to have reached \$25 billion by fiscal year 2017.

Also, Gujarat produces 30 per cent of the country's woven fabric, is home to more than 50 per cent of the country's processing machinery manufacturers and 90 per cent of weaving machinery manufacturers. It is also a leading manufacturer of technical textile fabrics, contributing to 25 per cent of the country's technical textile fabric output.

4.3. Availability of Skilled Manpower

While attracting investments into the T&A sector, Gujarat has also ensured skilled staff and workers. There are around 28 industrial training institute's (ITI's) in Gujarat providing training courses on Textile and Garment Industry with an approx. intake of 6000. These institutes provide textile development courses like Cutting and Sewing, Cutting and Embroidery and Needle Work, Computer-aided Dress Making and Dress Design, Tailoring, Pattern Making, Finishing Garment Checking etc. There are many colleges in the state which offer bachelors and master's degrees in textile technology.

Alongside, there are also other major academic institutions across the state which offer

training programs, like the Ahmedabad Textile Industrial Research Association (ATIRA), Man-made Textile Research Association (MANTRA), National Institute of Fashion Technology (NIFT), Apparel and Leather Technics (ALT) Training College, National Institute of Design (NID) and the Surat Education and Research Society.

4.4. Well Developed Logistics and Connectivity

Gujarat is well connected to all the major cities of the world both by air and sea routes. It has direct international flight connectivity to cities across Europe, Middle East, East Asia and America. Gujarat has a coastline of 1600 km with 42 ports connecting to major sea-based trade routes and trade centers like Middle East, West Europe, Asia and upcoming destinations on the African Continent. Gujarat acts as a gateway to landlocked states of India connecting to them by road, rail and air.

4.5. Presence of Textile Hubs and Large Textile Manufacturers

Leading national and international companies have invested in Gujarat textile industry owing to the availability of vast raw materials combined with investor friendly policies. Some of the key industry players that have presence in Gujarat include Arvind Mills, Welspun, Vardhman Group, Alok Industries, Raymond, Garden Silk Mills, Mafatlal, and Aditya Birla Nuvo.

Gujarat has established textile sector with more than 1500 medium and large textile units. The state also has 18 textile related project clusters. The major textiles hubs in Gujarat are listed below:

Table 12 : Major textile clusters in Gujarat

S. no.	Cluster	Segment
1	Ahmedabad	Cotton & blended fabric, denim, made-ups, ladies' garments, machinery & parts
2	Surat	Art silk fabric, synthetic textiles, zari manufacturing, embroidery, textile machinery & parts
3	Kutch	Textile handicrafts
4	Surendernagar, Manavadarand Gondal	Cotton ginning
5	Saurashtra, Jetpur	Hand printing and processing units
6	Ankleshwararand Tapi	Technical textiles
7	Umargaon	Modern power loom, synthetic suiting & shirting

5. Investment Opportunities in Gujarat

Indian apparel consumption is expected to increase significantly from US\$ 74 bn in 2018-19 to US\$ 160 bn. by 2025. This will mean an addition of US\$ 86 bn. in market size making India as one of the most attractive destinations for fashion brands and retailers. Since China's share in global apparel exports is expected to reduce over the next few years, there is an opportunity for Indian exporters also to grow exponentially by taking up the vacated share. Significant




investments will be required for product and infrastructure expansion to meet the demand growth for domestic consumption as well as exports.

In such a high growth scenario, Gujarat positions itself as the most competitive and advantageous Indian state for textile and apparel businesses to establish, expand and operate. Gujarat has more than 1,500 medium and large textile units holding one-fourth of country's output. Around 50% of the country's man-made fabric is produced in Surat city alone and the state is the largest producer of denim in India with a share of 65%. Over last few years, Gujarat has already attracted several new textile sector investments in addition to capacity expansion of existing ones.

Gujarat is home to some of the leading Indian textile groups, such as Arvind, Welspun, Alok, Ashima, Raymond, etc.; and FDI investors such as Ahlstorm, Skaps, etc. Apart from industries, Gujarat is also home to several prominent academic institutions offering technical education in textiles viz. Ahmedabad Textile Industrial Research Association (ATIRA), National Institute of Fashion Technology (NIFT), Apparel and Leather Technics (ALT) Training College, National Institute of Design (NID), Ahmedabad, etc.

The Department of Industrial Policy and Promotion (DIPP), Ministry of Commerce and Industry, in partnership with the World Bank Group has placed Gujarat as one of the top Indian states in terms of ease of doing business.

Figure 10: Comparison of Gujarat with leading Textile & Apparel Exporting nations

		Gujarat	Vietnam	Bangladesh
				
Population	Million	61	90	166
	Compared to Gujarat		1.5x	2.8x
Cotton prod.	MN. kg.	1,651	<1	27
	Compared to Gujarat		Negligible	Negligible
T&A exports	US\$ bn.	5	28	34
	Compared to Gujarat		5.6x	6.8x

Note: Exports figures of Gujarat are for 2014-15

The high potential of Gujarat as a competitive manufacturing destination is evident from its comparison with leading textile and apparel exporting countries ahead:

In terms of population, and cotton production, Gujarat is placed at a much better position than these countries. Existing manufacturing infrastructure, manpower availability and competitive cost of manufacturing makes Gujarat as competitive as Bangladesh and Vietnam for fabric and garment manufacturing and exports.

Considering the high potential of Gujarat in textile and apparel manufacturing, Gujarat launched Apparel & Garment policy in 2017 to promote investment and employment in apparel sector and make the state's textile manufacturing value chain fully integrated from fibre up to finished goods to harness the benefits of value addition. It offers various incentives such as interest subsidy on new plant and machinery, plug-n-play infrastructure support, wage subsidy, assistance for establishing dormitories, power subsidy and subsidy for developing mega apparel parks.

Taking into account all the factors mentioned above, Gujarat offers huge investment opportunity in the following areas:

- a) **Fabric Manufacturing:** Gujarat is the largest producer of cotton in the country and is already highly competitive in spinning segment. All the major players are equipped with latest technology and can spin all types of yarn with ease. Hence, any fabric manufacturer investing in Gujarat will get access to the desired quality and quantity of yarn.
- b) **Garmenting:** Gujarat Government has taken many initiatives for encouraging garment manufacturing in the State. It offers 5% interest subsidy on plants and machinery for a period of 5 years for garments and made-ups. Also, Gujarat has high availability of skilled manpower. It has 28 Industrial Training Institutes (ITIs) that offer specialized courses in computer-aided dress making and dress design, pattern making and needle work.
- c) **Technical Textiles:** Technical textiles is known as the sunrise sector for India. The demand for technical textiles products both in India and globally is growing significantly. Gujarat is leading technical textiles manufacturer in India contributing to 25% to the country's total technical textile output. Gujarat Government is instrumental in development of this sector in the state.



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