



Centre of Excellence
for Competitiveness for SMEs



Confederation of Indian Industry



TE~~X~~CELLENCE

2018

**Business Excellence in
Textile & Apparel Industry – Competitive
Strategy for Growth in Uncertain Times**



**25th
MAY
2018**
MUMBAI

Knowledge Partner

wazir
ADVISORS

Theme Paper

CONFEDERATION OF INDIAN INDUSTRY

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Foreword

Textile and apparel sector is one of the leading segments of the Indian economy and one of the largest sources of foreign exchange earnings. It accounts for about 5% of the Gross Domestic Product (GDP), and around 13% of the total Indian exports earnings. The sector also provides direct employment to 52 million people and indirect employment to an additional 69 million people.

Indian textile and apparel market is currently estimated at US\$ 127 Bn. The domestic consumption of textiles and apparel constitutes approximately 70% of the total market size while exports constitute the rest 30%. 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 US\$ 37 billion in 2017-18 and have grown at 6% CAGR since 2005. Availability of raw material, skilled manpower and favorable central & state government schemes would further help Indian exporters increase their market share and global competitiveness.

Achieving Business Excellence in textile and apparel industry has become imperative to sustain the growth India has achieved. It is a path in which organizations continually develop and evolve to deliver extraordinary performance in its operations and management. It involves outstanding practices to manage the organization which are based on a set of fundamental values thus delivering valuable results. To incorporate the values of Business Excellence, it is important to understand what it is and how it can be achieved.

This conference aims to provide a common platform for various industry stakeholders and policy makers for having a detailed discussion on achieving business excellence while creating a sustainable and innovative future for the Indian textile industry. The discussions and deliberations in the conference will lead to the output of various ideas, recommendations, intervening measures which will benefit industry stakeholders across the value chain in the long run.

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Chapter 1: Current Status of Global Textile and Apparel Sector

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. All four BRIC nations appear among the top markets having a cumulative share of approximately 21%. The apparel market is still largely dominated by the EU & USA, with a cumulative share of 42% whereas they are home to only 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%.

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

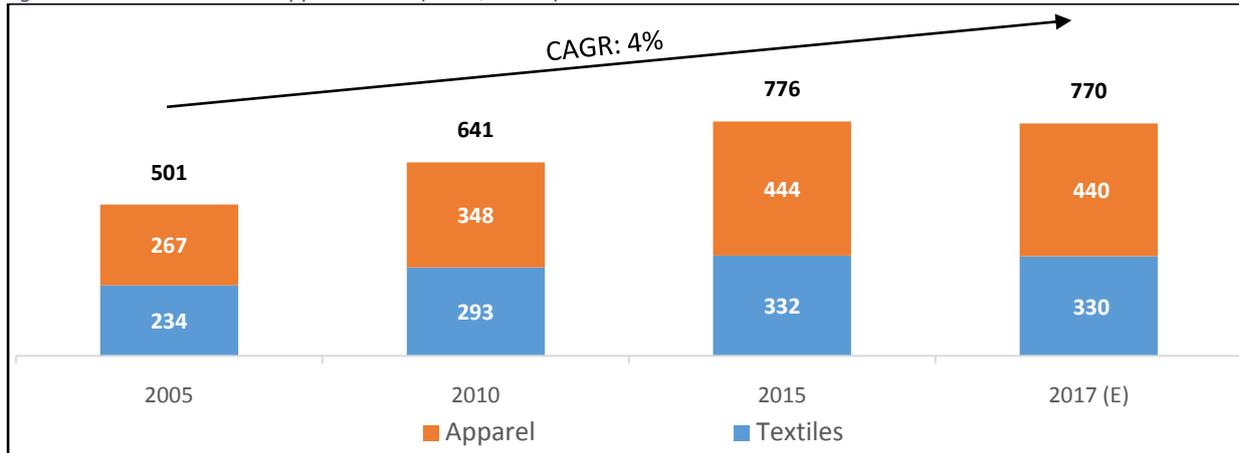
Country/Region	Value– 2017 (E)	Share - 2017 (%)
EU-28	417	23%
USA	341	19%
China	210	12%
Japan	99	5%
India	67	4%
Brazil	61	3%
Russia	41	2%
Canada	32	2%
RoW	550	30%
World	1,816	

Data Source: Published data and Wazir analysis

Global Textile and Apparel Trade

The global textile and apparel trade is estimated at US\$ 770 billion. Year 2005 is considered a landmark year for textile and apparel sector when the entire quota regime phased out. Since that time the T&A trade has grown at an annual growth rate of 4%. Apparel constitutes nearly 60% of the global trade of textiles and apparel.

Figure 1: Global Textile and Apparel Trade (In US\$ billion)

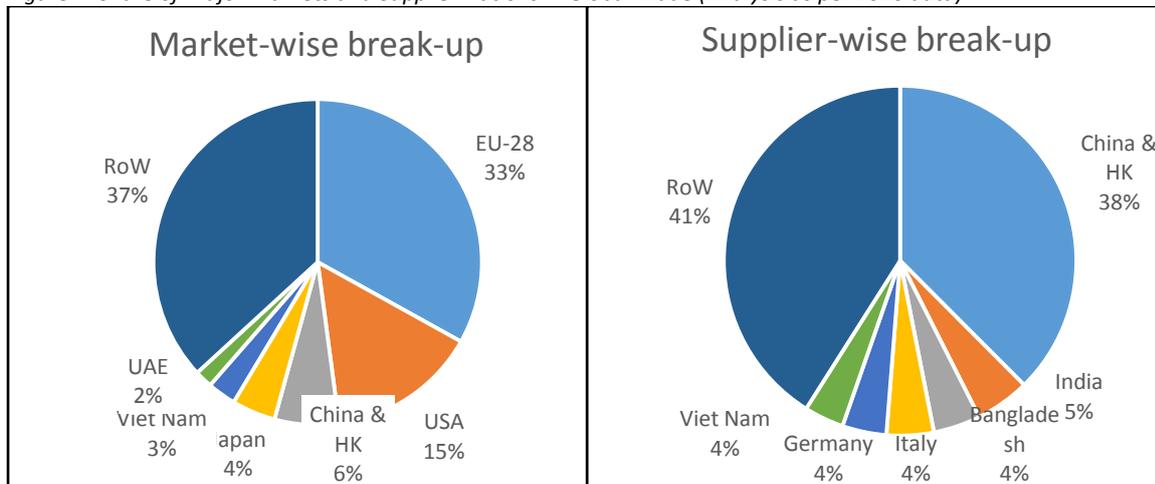


Data Source: UN Comtrade

Major Exporting and Importing Nations

EU and USA are the largest markets for textile and apparel with a share of 33% 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 37% remotely followed by India at 5%.

Figure 2: Share of Major Markets and Supplier Nations in Global Trade (Analysis as per 2016 data)



Data Source: UN Comtrade and Wazir Analysis

Chapter 2: Current Status of Indian Textile and Apparel Sector

Textile and apparel sector is one of the leading segments of the Indian economy and one of the largest sources of foreign exchange earnings. It accounts for about 5% of the gross domestic product (GDP), and around 13% of the total exports earnings. The sector also provides direct employment to 52 million people and indirect employment to an additional 69 million people.

India's key strengths in this sector lies in availability of all types of natural and manmade fibres, large pool of manpower across the levels of hierarchy, presence of complete value chain, a large and growing domestic market and design capability. Indian exporters are also well supported by Government Schemes such as Duty Drawback, Rebate of State Levies (ROSL), Merchant Export from India Scheme (MEIS), Advanced Authorization, etc. Several state government like Gujarat, Jharkhand, Maharashtra, etc. are also offering sector specific incentives like capital subsidy, interest subsidy, wage subsidy, etc. These support initiatives allow Indian exporters to overcome a large part of duty disadvantage they face in markets of EU and US where some of the competing nations get a zero duty access. These factors make India a preferred destination for textile investments as compared to its competing nations like Bangladesh, Vietnam, Sri Lanka etc. This article further details the current status of Indian textile and apparel industry, key trends, challenges and the way ahead for the sector.

India Production 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 2: Installed Capacities in Indian Textile Sector (2016-2017)

Description	Capacities
Spindles	52 Mn.
Rotors	0.9 Mn.
Man Made Fiber	1.8 Bn. kg
Man Made Filament	2.2 Bn. kg
Looms (Including power looms)	2.6 Mn.

Table 3: India's Textile and Apparel Production

Commodity	Production (2011-12)	Production (2016-17)	CAGR (2016-17)
Fiber (mn. kg)	9,593	9,189	-1%
Natural Fiber	8,359	7,825	-1%
Manmade staple fiber	1,234	1,364	2%
Yarn (mn. kg)	5,835	6,818	3%
Spun yarn	4,372	5,659	5%
Manmade filament yarn	1,463	1,159	5%
Fabric (mn. sq. m)	60,453	64,421	1%
Woven fabric	47,507	46,884	0%
Knitted fabric	12,946	17,537	6%
Garments (mn. pcs)	12,600	18,500	8%
Made-ups (mn. kg)	1,800	2,100	3%

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\$ 127 Bn. The domestic consumption of textiles and apparel constitutes approximately 70% of the total market size while exports constitute the rest 30%.

Figure 3: Indian Textile and Apparel Market 2017 (Values in US\$ billion)

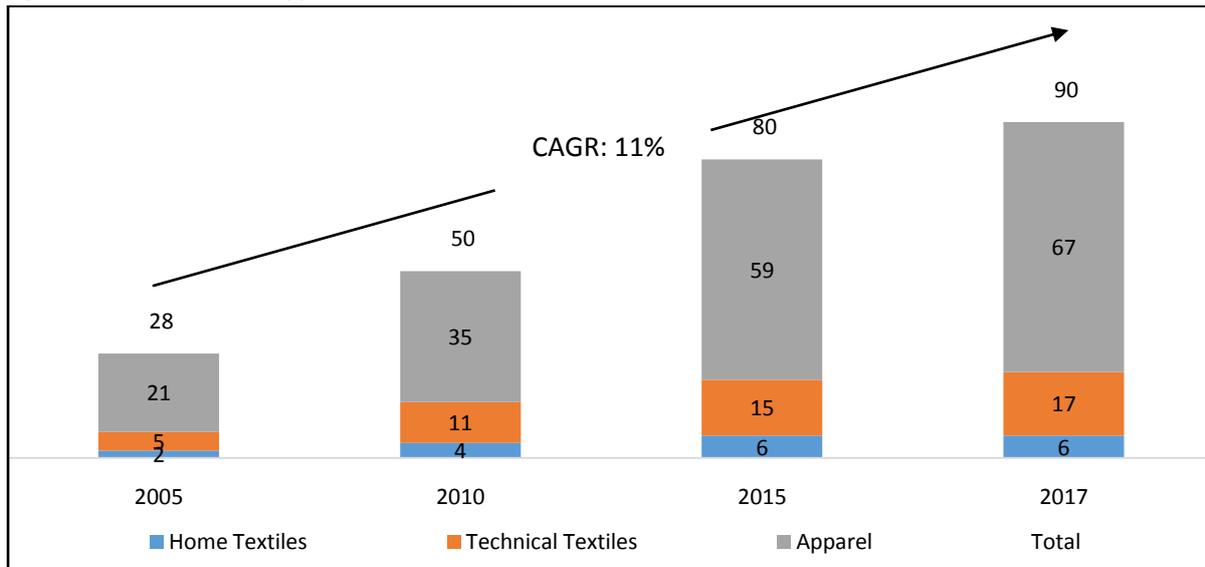


Data Source: Ministry of Textiles, DGCI&S and Wazir Analysis

Domestic Market Overview

The current domestic textile and apparel market is estimated at US\$ 90 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 4: Indian textile and Apparel Market Size (US\$ billion)



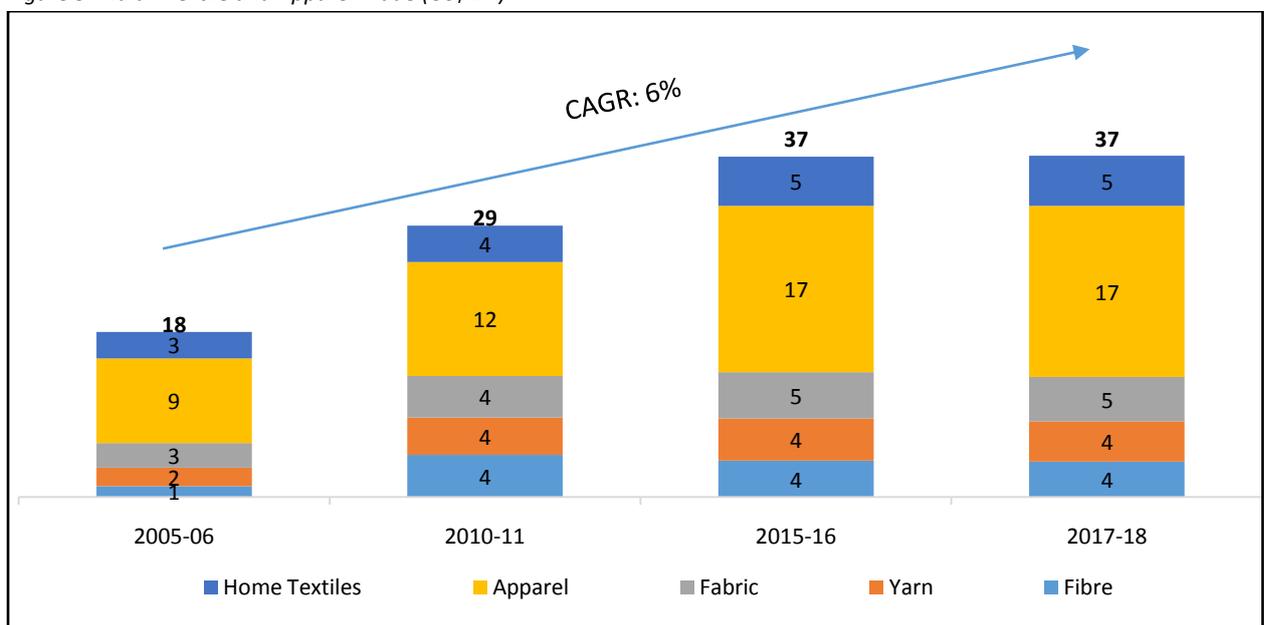
Data Source: Ministry of textiles and Wazir Analysis

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 8% of the overall retail market of US\$ 600 Bn. Within this, apparel has a share of approximately 8%. 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

Indian Exports Overview

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 US\$ 37 billion in 2017-18 and have grown at 6% CAGR since 2005. Availability of raw material, skilled manpower and favorable central & state govt. schemes would further help Indian exporters increase their market share and global competitiveness.

Figure 5: Indian Textile and Apparel Trade (US\$ Bn)



Data Source: DGCI&S and Wazir Analysis

Chapter 3: Understanding Business Excellence

Excellence is a term that was coined to show exceptional performance. A business organization can be considered a dynamic system when a change drives continuous growth of company. Hence, Business Excellence can be defined as a path where organizations continually develop and evolve to deliver extraordinary performance in its operations and management. It involves outstanding practices to manage the organization which are based on a set of fundamental values thus delivering valuable results.

The real question is what makes an organization a world class one? - Satisfaction of the key stakeholders i.e.:

- Customers,
- Employees, and
- Shareholders

Hence, excellence is finding satisfaction in what the organization achieves, how it achieves and whether it is continually achieving.

To achieve Business Excellence, it is important to measure performance. Companies generally measure the same through financial indicators. However, it is important to understand that non-financial measures drive growth in an organization and hence are the critical success factors. These non-financial indicators can be quantified to measure business performance.

To measure Business Excellence, various countries have developed frameworks that assess and recognize the performance of an organization. These enable the organization to absorb the principles and practices of Business Excellence into the day-to-day business operations. It facilitates a systematic and controlled way to operate, recognizing the factors driving the performance. Not only these models help in the adoption of business excellence principles, but also expedite the adoption process. The most common of the business excellence models are:

- Malcolm Baldrige (MBNQA) – Used in over 25 countries including US and NZ
- European Foundation for Quality Management (EFQM) – Used throughout Europe
- Singapore Quality Award Model – Singapore
- Japan Quality Award Model – Japan
- Canadian Business Excellence Model – Canada
- Australian Business Excellence Framework (ABEF) – Australia

The core values of most of Business Excellence models are almost similar and are the indicators of growth. These have been incorporated in many models of Business Excellence:



a. Leadership

Management is the pillar of the organization that steers it towards all the other values of Business Excellence. Having a clear vision and mission leads to a better plan of action which can be only facilitated by thought leadership with values embedded in them.

b. Customer Focus

Effective modern organizations are marked by strong customer focus across all levels of the company. Organization performance is directly related to customer focus. It is not only important to focus on external customers of the organization but internal customer

satisfaction is equally important. Employees and internal departments of the organization form the internal customers and they are benefitted from the performance of the organization.

c. Employee Focus

While management is a key in driving the company forward it is important that each employee has a sense of ownership thus encouraging more “*intrepreneurship*”. Employee engagement leads to better productivity levels as they work harder and faster. Textile industry also faces the shortage of skilled manpower, which makes all the more important to recruit the right talent and further retaining the people to maximize the benefits.

d. Collaboration

Business Excellence involves transformation of organization from trying to Do-It-Yourself and win alone to forming networks by developing close partnerships thus, building a larger and an integrated system. Outsourcing teams and talent would enable the organization to perform better as a whole which doesn't involve addition of much assets but earns huge rate of return.

e. Management by Fact

Data collection and management has become easier in the technology-driven world and it is convenient to use statistical tools to take strategic business decisions. Customer feedback and surveys can garner enough facts and figures for the management to take logical and rational decisions.

f. Result Orientation

Business excellence strives to develop value for customers, employees, partners and other stakeholders. Thus, satisfaction of the key stakeholders is a critical performance area and balancing the requirements of each of them is the key to a successful strategy.

g. Innovation

An organization must be able to understand not only the current needs of the customer, but also the futuristic demands. To stay ahead of the competition, the company must continually develop new products/services so that the organization can exceed customer

expectation. Knowing the future demands of its customers would facilitate the same and place the organization at a better position in the market.

h. Continuous Improvement

Continuous improvement of all the above elements of operations and management is an important step towards Business Excellence. Continuous improvement also constitutes prevention. “Prevention is better than cure” is a principle that applies to organizations too where it is important to prevent breakdowns, miscommunication, and other types of waste. If the business is committed towards improvement, these wastes can be avoided beforehand.

Case Study: TAL Group

TAL Group is one of the largest garment manufacturer in the world. The company headquartered in Hong Kong was started in 1947 and in 1962, Textile Alliance Limited (TAL) was formed. TAL is one of the forerunners in the garment industry and is a world leader when it comes to optimized operations and business processes. Currently the company produces 53 million garments in a year in its 12 manufacturing facilities around the world. Today one out of every 6 dress shirts sold in US is manufactured by TAL group. The company received several accolades to its name in 2016 itself. These include, “Best Customer Service Award”, “Green Award”, “QA Pass Rate Award”, “Award by Federal Democratic Republic of Ethiopia”, etc. Various factors that differentiate the group are as follows:

- Product Innovation
- IT Initiative
- Process Optimization

It calls itself The Garment Innofacturer as it not only focuses on volume but producing quality products through innovation. Few of them include pucker-free shirt, a 100% wool pant machine washable, stain resistant collar and cuffs, Breathable garment, etc. It is the first company to produce a wrinkle-resistant shirt.

The company has invested immensely in its IT infrastructure. TAL took advantage of the booming technology around 1995 to 2000 to migrate from an in-house production system to a more advanced IBM powered ERP system which integrated the workflow applications with their in-house production system. It helped them to coordinate their worldwide production setup. With the change in technology TAL has progressed and last year it migrated its ERP System to public cloud. It enabled the company to better utilize its resources and shift its focus from infrastructure management to business innovation.

TAL was able to achieve process optimization long before any other garment manufacturer in the world when it redefined supply chain management with its relationship with JC Penny. TAL laid down a milestone in mid-1995 for being capable of replenishing stock for JC Penney within one week from order to ship, significantly reduced from their standard six-month turnaround. TAL Group is one of the leading companies which demonstrates philosophies of business excellence and its effective execution.

Case Study: Vardhman Group

Vardhman Group is one of the largest integrated textile manufacturer and exporter headquartered in Ludhiana, Punjab, India. It was incorporated in 1962 and has more than five decades of

experience. It has 22 production plants across nine states in India and is recognized as the largest yarn manufacturer with a capacity of over 1 million spindles. The company's market cap as of 31st March 2017 is ₹7,341 crores. Over the years, Vardhman has achieved business excellence through continued focus on:

- Product Development
- Value Addition throughout Supply Chain
- Global Collaborations
- IT Integration

Vardhman has always focused on product innovation and has continuously added diversified and value added products to its product offering. Its specialized products include 9 product varieties including-cotton lyocell, cotton bamboo, cotton tencel, cotton silk, contamination free yarn, etc. Vardhman has a product variety of 75,000 sewing threads. More than 15 varieties of acrylic fibre are also included in its product basket. The company adds value in its products, not only in yarn, but also in fabrics through specialized finishes such as Teflon/nanocare, etc. Also, the fabric produced by the company goes into varied end usage like top weight apparel, bottom weight apparel, etc. Vardhman creates values through its business model which is a 10 step roadmap to achievement.

Technical Tie-Ups and Global Corporates are an essential part of Vardhman as it has been associated with 6 companies all over the world for different technical collaborations. The knowledge transfer has immensely benefitted the company as it has enabled it to foray into yarn/fibre dyeing and gassed mercerized yarn, technology transfer, equipment supply, fabric processing and marketing.





Vardhman also ensured its success through IT integration in its company. It invested ₹30.18 crores in IT solutions from 2000 to 2015. ERP to integrate multiple platforms used by different divisions into a single entity. The IT solutions were provided by IBM in which the first phase of implementation was a Management Accounting Information System (MAIS) that enabled the company to plan production budgets and product costs. It went further on to automate the production processes with Dye House Management System, Customer Tracking System due to which the company reduced inventories and manufacturing costs that lead to timely deliveries and better utilization.

Chapter 4: Challenges Faced by Indian Textile and Apparel Industry

Though Government has taken various initiatives to boost investment in textile and apparel sector in India, the industry has not exploited its full potential. The industry has its fair share of challenges which are posing hindrance to its exponential growth. The key challenges faced by the industry today are as follows:

a. Obsolete Technology

Though India is the second largest T&A manufacturer in the world, it is worthwhile to note that most of the machinery used in the industry is outdated in terms of technology advancement. This creates an impact on the efficiency and quality levels. A significant portion of this capacity is with the unorganized sector which lacks economies of scale. In the information age, where machines are being improvised with IT integration, India lacks in this development thus posing challenge for Indian manufacturers and reducing their competitiveness.

b. High Cost of Capital

The lending rates in India are one the higher side as compared to its competing nations like China and Vietnam. The increased cost of capital affects the overall production cost and hence its competitiveness.

	India	China	Vietnam	Ethiopia
Lending rate (%)	11-12%	5-6%	6-7%	6.5-7.5%

c. Low Focus on Technology and Product Development

Though India has one of the largest installed production base in the world, the industry suffers from the use of outdated technology especially in the power loom sector, processing, etc. as well as lack of amalgamation between Information Technology and machinery. Also, design and product development is a key area, which is yet to receive significant attention from the Indian textile & apparel industry. In general, spending on R&D, product development etc. by textile companies in India is quite low. As a result, India has a

nominal presence in high value added segments and innovation driven technical textile segment.

d. Fragmented Nature of Industry

Indian textile industry is highly fragmented with dominance of unorganized sector especially in the fabric production, fabric processing and garment manufacturing. On the other hand, global competing nations like China, Bangladesh etc. work on the principal of large scale production with large manufacturing set-ups. The Indian textiles sector is dominated by SSI sector which have limited resources and lack awareness thus, expansion of capacity and up-gradation of technology becomes a huge challenge. Due to this, Indian textile manufacturers are unable to offer better prices and cater to large orders.

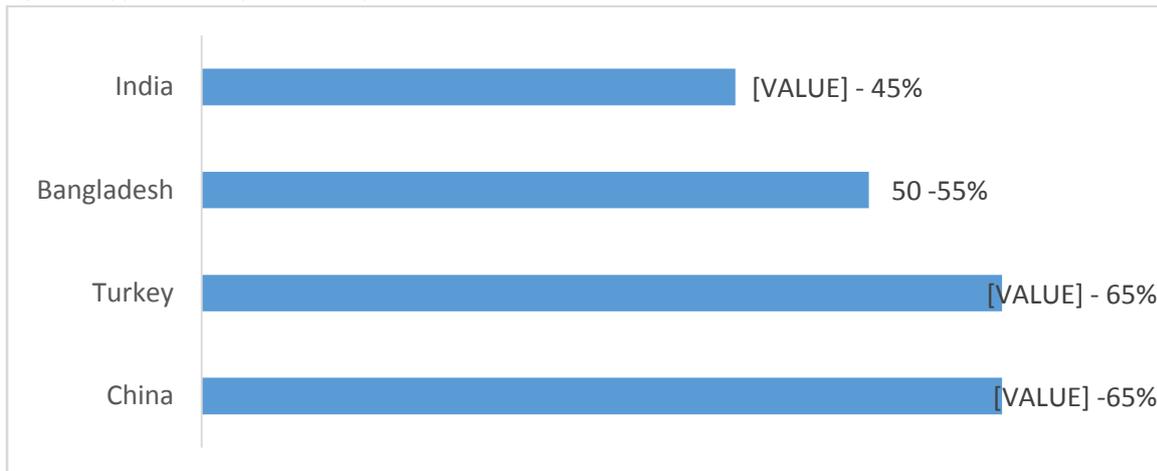
e. Lack of FTAs

India's competing nations like Bangladesh, Turkey, Cambodia, Pakistan, etc. have duty free access in the major textile markets of US and/or EU. Exporters from these countries enjoy duty advantage ranging from 10% to as high as 34%, depending on the product. However, India till date does not have any trade agreement with a major textile and apparel consumption base which could have helped in exponential growth of India's textile and apparel exports. These differential duty puts India in a weaker competitive position in the world market.

f. Low Efficiency Levels

The overall productivity levels in the sector, especially in garment manufacturing are low as compared to its competing nations like China, Turkey, etc. One of the reasons is that the training infrastructure is not geared to meet the demand of skilled labour in the country.

Figure 6: Apparel Factory Productivity Levels in Selected Countries



Data Source: Industry Feedback

g. Raw Material Challenges

Globally India is the largest producer of cotton with a share of 25% of the global cotton production. It also has 43% share of the world’s cotton harvested area which is the largest in the world. However, India has the lowest yield amongst the top 10 cotton producing nations i.e. 550 Kg/Hectare which is even lower than the world average of 603 kg/ hectare. Also, the contamination in cotton has remained a big challenge for Indian cotton. This due to the fact that processing facilities at picking and ginning stages are not completely mechanized. According to ITMF’s Cotton Contamination Survey 2016 “The most contaminated cotton descriptions originate in India (India-Others, J-34, MCU-5, Shankar, DCH), Pakistan (Pakistan Others) & Ivory Coast (Ivory Coast), etc.

h. Limited Skill Availability

In order to achieve global competitiveness, availability of productive and skilled manpower is very important. At present, the education and training infrastructure is not geared up to meet the demand of skilled labour. Investment in improving the skills and productivity of the workforce, by both private industry as well as the Government in genuine partnership is missing.

Chapter 5: Required Industry Initiatives and Government Support

In lieu of the above mentioned challenges, initiatives by both industry and government are essential to uplift the industry as a whole. While the industry needs to achieve organizational excellence, the government can act as a catalyst to make the Indian textile and apparel industry more competitive in manufacturing and exports.

Industry Initiatives

a. System and Process Improvement

The textile and apparel industry being a labour intensive industry lacks standardized systems and processes due to which organizations operate on lower efficiency level. Removing the redundant and ambiguous operations from the system and defining the processes is the key to improvement. Standard procedures optimize the process flow and streamline the operations. This brings in productivity improvement which makes manufacturing cost competitive and improves lead time, enabling organizations to execute larger and more number of orders hence, benefitting the company.

b. Collaboration not Competition

Collaboration trumps competition when it comes to businesses trying to expand in this world of cut throat competition. For example, JC Penny and TAL group collaborated while trying to achieve a breakthrough in supply chain optimization. When organization understands its individual and competitors strength, it can create a pool of talents to achieve a common vision.

c. Improve Focus on IT

Globally, influx of data and information is driving the growth in all businesses. However, owing to obsolete technology and orthodox mindset of the management, focus on IT is majorly missing in the Indian textile industry. Tools such as Management Information System (MIS) and Enterprise Resource Planning (ERP) can give insights about the past and current performance of the business. These insights can be used for developing future action plans.

d. Market Intelligence

Market Intelligence enables the organization to bring the right product at the right time in the market. Having a pro-active approach while doing market research on buyers, competitors and other trade aspects facilitates a strategic decision making. For example-the women's bottom wear leggings entered the Indian market just a few years back but gained quick acceptance and has turned into more than ₹800 crore market.

Continuous tracking of global and domestic trends is an essential component of any business decision. The Indian T&A companies have to make this aspect a major thrust area and establish such systems in-house.

e. International Partnerships

Cross-border partnerships have long been believed to bring investments and technology know-how into the country. It benefits the entire value chain facilitating knowledge transfer, product innovation and technology advancement. Strategic partnership goes beyond investments involving strong management level discussions and is mutually beneficial to both the parties. International cooperation enhances the quality and the global footprint of the organization.

Government Support

Though the Central government and various state governments have been proactively focusing on the development of textile industry of India, it needs to further work on certain focus areas that can provide a strong support to the industry so as to make India as a global competitor. Few thrust areas where the government can focus have been mentioned below:

a. R&D Support

Innovation drives growth and is an important determinant of global competitiveness. While India is known for its traditional products, very limited innovation has taken place so far. There is a need to provide impetus to innovation and R&D which can help in developing products with high commercial acceptability. When compared to other competing countries like China and Bangladesh, the efficiency and productivity levels of Indian textile sector is quite low. To improve this, the sector needs to be supported for deploying state-of-the-art modern technologies and adopting processes which are more efficient than the traditional ones. Also, there is a need to create Centers of Excellence (CoEs) and support them for initial years for industry participation.

b. Scheme to Enhance Quality and Productivity

There is a need to develop a scheme to support companies to work towards improvement in quality and productivity level in the sector. In order to achieve the desired objective, the Government may work with the Quality Council of India and the National Productivity Council.

c. Attracting FDI

In order to get the desired technical know-how, and marketing network required to produce and sell high-end products competitively, special efforts should be made to attract Foreign Direct Investment (FDI) into the textile sector.

d. Training Support

Availability of skilled and productive manpower is very crucial to achieve global competitiveness. The initiatives on skill development through the Textile Skill Sector Council

in partnership with Industry may be scaled up. Also, there is need to implement a program for assisting individual firms for providing qualitative training support at all levels in the organization.

e. Attracting Large Scale Investment

The textile and apparel sector of India is highly fragmented and dominated by MSME sector. To be globally competitive, it is required to promote large scale manufacturing set-ups for economies of scale. For attracting investments in the sector, it is required that good incentives should be given to investors. Incentives focused on technology up-gradation, capacity addition and long term development of the sector are crucial at this point of time. The incentives need to be attractive enough for Indian as well as international investors. Improved investment environment will stimulate investments, provide technical know-how and develop state-of-the-art set-ups required for the sustainable development of the sector.

f. Develop WTO Compliant Export Schemes

Being the 2nd largest exporter of textile and apparel with a 5% share in global exports, India has acquired export competitiveness. It crossed the WTO threshold of 3.25% share in global exports in 2010. Post this, the 8 year window to phase out the export subsidy is also getting over in 2018 as per the WTO Agreement on Subsidy and Countervailing Measures (ASCM). Thus, it becomes extremely important to formulate alternative WTO compliant export schemes for the textile and apparel exporters.



Confederation of Indian Industry

The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the development of India, partnering industry, Government, and civil society, through advisory and consultative processes. CII is a non-government, not-for-profit, industry-led and industry-managed organization, playing a proactive role in India's development process. Founded in 1895, India's premier business association has over 8,500 members, from the private as well as public sectors, including SMEs and MNCs, and an indirect membership of over 200,000 enterprises from around 250 national and regional sectoral industry bodies. CII charts change by working closely with Government on policy issues, interfacing with thought leaders, and enhancing efficiency, competitiveness and business opportunities for industry through a range of specialized services and strategic global linkages. It also provides a platform for consensus-building and networking on key issues. Extending its agenda beyond business, CII assists industry to identify and execute corporate citizenship programmes. Partnerships with civil society organizations carry forward corporate initiatives for integrated and inclusive development across diverse domains including affirmative action, healthcare, education, livelihood, diversity management, skill development, empowerment of women, and water, to name a few. The CII theme for 2017-18, India Together: Inclusive. Ahead. Responsible emphasizes Industry's role in partnering Government to accelerate India's growth and development. The focus will be on key enablers such as job creation; skill development and training; affirmative action; women parity; new models of development; sustainability; corporate social responsibility, governance and transparency. With 67 offices, including 9 Centres of Excellence, in India, and 11 overseas offices in Australia, Bahrain, China, Egypt, France, Germany, Iran, Singapore, South Africa, UK, and USA, as well as institutional partnerships with 344 counterpart organizations in 129 countries, CII serves as a reference point for Indian industry and the international business community.



Established in 2004, today Chandigarh based CII - Centre of Excellence for Competitiveness for SMEs is a single point of reference for meeting the needs of small and medium enterprises for enhancing SME competitiveness. With a pan India approach, the Centre plays role of a guide and mentor for SMEs by its 'Cluster Approach', which enables SMEs to learn through sharing of knowledge with other Cluster companies. Best Practices and a detailed road map for enhancing productivity and efficiency of Cluster companies is charted and implemented by the seasoned counselors of the Centre. The Centre works exclusively to enhance the competitiveness of MSMEs, through interventions in areas such as Manufacturing Excellence, Energy Efficiency, Cost Management, Total Employee Involvement, Corrosion Management etc. Our Pro-active International Engagements ensure that we are in tune with the cutting edge of global Competitiveness in order to transmit the same to the Indian SMEs. More than 220 training programmes have been held in the last 3 years, benefiting more than 3500 delegates.

The centre offers services in the following areas: *Manufacturing Excellence | Energy Audits and Management | Corrosion Management | Human Resource Management | Total Cost Management*

wazir ADVISORS

Wazir Advisors is a management consulting firm with a special focus on textile value chain assisting clients in strategy formulation and implementation, forming alliances and joint ventures, investments, market understanding, sector analysis and due diligence – thereby providing end to end solution spanning the complete business cycle in textile sector.

Having worked with leading national and international companies, public sector organizations, Government departments, development agencies, trade bodies etc., Wazir has a deep understanding of business dynamics and right connect with people in the sector.

Wazir's team of sector experts possess experience across functions – projects, operations, sourcing and marketing. The team members have worked on strategy and implementation assignments in all major textile and apparel manufacturing and consumption bases across the globe.

Wazir leverages its body of knowledge, contacts and combined expertise of its team to deliver value to the clients. Wazir offer services in following areas:

Strategic Advisory Services

- Corporate strategy
- Business performance enhancement strategy
- Market entry strategy
- Marketing and distribution strategy

Market research

- Consumer surveys
- Trade research
- Market intelligence
- Customer feedback & relationship management

Services for Govt. and Development Agencies

- Sector growth strategy
- Export and trade promotion
- Policy formulation
- Policy evaluation
- Establishment of industry support centers Implementation Assistance

- Apparel factory re-engineering
- Productivity improvement for apparel factories
- Supply chain optimization
- Training for operators, supervisors and middle management

Support for investments

- Cross border investments
- Company due-diligence
- Location analysis
- Partner search - M&A and JV, other forms of business partnerships
- Feasibility studies and bankable Detailed Project Report (DPR) preparation

Thought leadership

- Conference Knowledge partner Sector whitepapers