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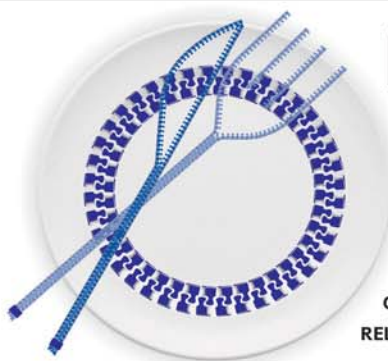
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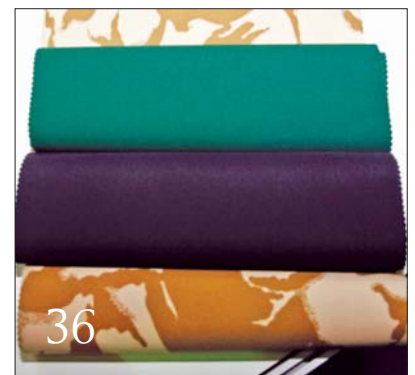
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food for thought



**QUESTION**

The Indian Apparel Industry has been put on the EO listing pertaining to forced and indentured child labour, by the US Department of Labor. This development could impact sourcing from the country...What do you think the AEPC should do now... Are the actions they are taking enough?

**Priyanka Dudlani, Executive Director, A.P.D Exports, Mumbai** ■ The Indian Apparel Industry being included in the EO Listing is a source of concern for many exporters as the US is one of our biggest markets. I feel the AEPC has taken all the necessary steps to counter the development by investigating this issue and initiating a code of ethics for the industry. The Indian garment exporters are well aware of regulations on child labour and are against employing children in their factories. The Government, along with the AEPC, will hopefully be able to prove that these allegations are a matter of the past. By creating further awareness, we can only hope that those exporters who are responsible for stray cases that bring international media attention to the issue also realize that child labour will not lead to any benefits, but will only be detrimental for the entire industry.

**Atman P. Shah, Vice-President Marketing, Artex Apparels, Ahmedabad** ■ Such a scenario wherein child labour was prominently used in the industry existed way back in the sixties, but now the buyers are very stringent about their compliances. They refuse to work with such firms which are engaged in malpractices like child labour.

The AEPC has undoubtedly been slow in taking action. If any of the factories is found indulging in forced

child labour practice, they should be punished severely for it and it should be made sure that the entire industry doesn't suffer because of the insensitivity of a few persons.

**Ashish Garg, MD, AG Fashion, Jaipur** ■ It appears quite regretful that the Apparel Industry could not undertake proper investigation and prepare the necessary documented proofs that were required to obtain clean chit from the US Department of Labor whereas the Carpet Export Promotion Council was able to do the needful. They should now, engage with the concerned law consultants in US and talk about ways of being omitted from the list. Also, the common compliance code should be developed as soon as possible.

It is also a fact that the work required in the Apparel Industry can't be deftly done by children as they lack the capacity to learn the much needed skills at such a tender age. Most of the workers we employ are semi-skilled and skilled. Now is the need to support the fact with proof!

**Ram Avtar Kandoi, MD, Avon Creations, Jaipur** ■ Apparel Export Promotion Council is an entrusted body of the Indian Apparel Industry. It is quite unfortunate that despite being in AEPC's notice the industry was put under the EO list by the US

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Department of Labor. Being put under the EO list would have a substantial effect on the industry in the long run. The buyers might become reluctant to work with the Indian companies.

The industry should support the AEPC in the procedure it has/would undertake to remove the country's name from the EO list. Obviously, the steps AEPC had taken earlier did not suffice. However, the industry rests its trust in the AEPC and hopes it is able to come up with a solution soon.

**Vivek Thakur, Managing Director, Aryavart, Jaipur** ■ It appears to be an odd fact that the Indian Apparel Industry has been put in the EO list by the US Department of Labor. As a matter of fact, the industry is facing shortage of manpower as far as the blue collared workers are concerned. Practices like child labour can only be forced by the firms if the human capital is available in surplus.

AEPC should give deadlines to the concerned personnel involved in the investigation so that the matter is taken care of as soon as possible. Since, India has been put in the list while AEPC was taking actions in this regard; it shows that AEPC is not taking enough steps to solve the problem.

It should take advice and consult the Carpet Export Promotion Council since it was very speedy in

investigating its companies and documenting the required information in the correct manner.

**Jitendra Kaushal, MD, J.K. Overseas, Delhi** ■ No matter how much the industry shies away from reality, but the fact remains that some of the units still practice child labour. The sad part is that the blame is shared even by those who are not utilizing child labour or indulging in any such activities. The units which are into the manufacturing of basic wear/fast fashion will not be affected much but the ones dealing in high fashion would definitely be affected in the long run, as they are the ones outsourcing to contractors using child labour.

The actions taken by Apparel Export Promotion Council are insufficient. It should do a deeper investigation and notify the units on any updates. It should also pace up on the formation of the common compliance code.

#### QUESTIONNAIRE

Is the manufacturing of disposable products made from technical textiles the growth direction for the garment industry... Do you think there is space for new players in this niche market?

Write your comments to us by 21<sup>st</sup> August 2010 at: [contact@apparelresources.com](mailto:contact@apparelresources.com) or post your views online through our website: [www.apparelresources.com](http://www.apparelresources.com)

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## LIGHTER MOMENTS

# Musafir Hoon Yaaron.....!

CONTRIBUTOR: NEERAJ DUGGAL, ASSISTANT MANAGER MERCHANDISING, IMPULSE

**I**t is a dream for all of us to travel light, but with the need to squeeze in as many samples and presentations as possible, our business travel invariably means lugging those huge suitcases across the oceans, to wherever we are headed for!

This story goes back to year 2007, when I was working for a big multinational sourcing company, and one of the customers wanted us to arrange a Vendor Meet in their corporate office in Boston. A Vendor Meet meant about a dozen vendors being invited and each vendor was to have a stall presenting their product. This was a good opportunity for our team also to travel and finally 8 of us, including our team leader, were

all set to go for this trip and the travel arrangements started with a lot of excitement.

One by one, 16 suitcases were packed and all bags were then duly marked to identify the product inside so that unpacking at the final destination would be much easier. All too pleased with our packing expertise, finally we had 16 bags all lined up to take to the weighing machine since it was important that we did not exceed the allowed luggage weight when we checked in for our flight...

The travel went smooth and Boston was sunny and beautiful, and our customer, an excellent host, we started our Day 1 as planned. The vendors who had stalls the first day had also arrived and we all met up in the customer's office, and the 1st day was flagged off with great success.

Day 2 followed in a similar manner as more vendors arrived, and it looked like a mini India with so many of us there, and at the entrance to the presentation hall, we had arranged a small table with pictures of Lord Ganesha to create the proper ambience.

As the Vendor Meet ended, followed by 2 more days for our team to stay back to work with various buying teams on sample developments etc., the excitement was building up as few test orders were also placed! It was now time to head home to start working on all these follow-ups on the new orders.

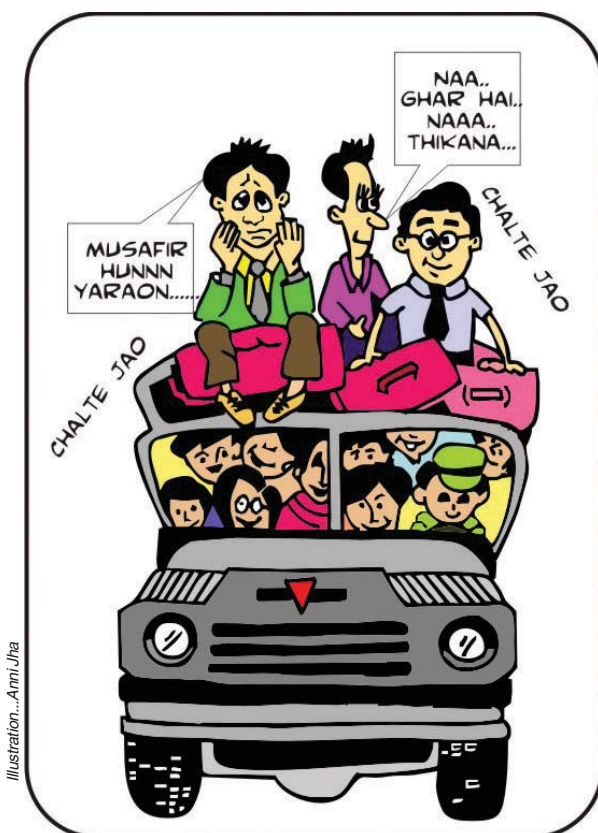
We had a late evening flight out from Boston back to India; which meant at the end of our

last working day we had to head straight to the airport from our customer's office. Our bags needed to be repacked now, with additional luggage of new sampling requests, and heavy customer manual copies to be distributed to vendors getting the test orders... and as we started packing, we wondered how we were going to fit all this into our 16 bags which seemed just not enough to hold everything! All 16 bags, along with 16 small handbags, were arranged in a hall as we started to pack... and the heavy catalogues and files went into the hand luggage to make sure the check in bags had more volume... but less weight!

Finally, all was under control which was an exemplary proof of teamwork as each one of us helped in achieving our goal, and as the last bag was put on the weighing machine and found acceptable, there were cheers all around and we were ready to head for the exit door to catch the coach booked by the host office to take us to the airport.

The coach arrived and the driver came and greeted us... introducing himself as Bob and exchanging friendly hellos... which were very short-lived as soon as his eyes fell on the luggage piled up in a corner! He looked at the huge bags in utter disbelief and turning to us, asked in a shocked voice... "Is all this to go to the airport?"

"Yes of course... and some small handbags as well.....!!" Answered the Luggage supervisor in our team and giving Bob a sweet smile, he suggested it was time now to load the luggage!



**LIGHTER  
MOMENTS**

Bob was still in a state of shock and he quickly took out his pager to call his boss to share the alarming challenge ahead of him to load in his coach 16 huge bags..., some small bags... and 8 Indians!!! We heard him telling his boss that never in his life had he seen such massive bags and he needed help desperately... it was An Emergency!!!!!!!

By now, we had started looking at our watches as it was getting close to our flight time, and the airport was a good hour away. Bob was still under shock and wanted to wait for a second coach to arrive as he thought it was impossible for all of us to fit into his vehicle. But there was no time to wait for another vehicle and our team leader had a good idea as she gently went to Bob and explained the situation to him. She also suggested that all the loading of the bags will be done by our team and Bob need not worry at all as we would arrange all bags in such a way that there will be enough room for everything and everyone. Finally, Bob gave his nod and before he could change his mind, we quickly started to load the bags one by one... the bigger ones went first as each bag passed from one hand to the other and finally landed inside the vehicle. Soon, all 16 bags had been deposited... and now it was the turn of the hand luggage which was fitted in-between the gaps, and on top of the large bags.

By the time the luggage was in, the coach seemed fully packed with no apparent space for 8 of us! But then we Indians always find *jugaads* for everything... right? The back door of the coach was opened and each of us slid into the coach one by one and as the last team member jumped in... there was a loud applause as the door was shut! Bob was the only one left outside the coach immobilized, as he stood watching all this action and one of us had to open a window and whistle out to him, with a thumbs up sign and telling him that it was time to move on to the airport!

COLUMN EDITOR



**Hello Dear Readers,**

The title of our current story reminds me of a dear friend of mine from our industry, Ajju. He is an extremely successful entrepreneur doing great business, and is always on the move meeting various buyers and booking great orders! He has been fondly nicknamed *Musafir* due to his ever so frequent travels and in fact that's the name with which his personal e-mail ID starts! Such is the impact of business travels on our lives!

Travelling in a group is always lot of fun as we can also see in this story how the team of 8 seems to have enjoyed themselves at the end of a hectic business trip. I fondly recall some business trips to New York where managers and merchants from our team often travelled together along with me for various meetings, and at end of the day, we would enjoy a meal together recapping the day... and on one such trip, six of us went along for a Broadway musical, *Fiddler On The Roof*, and enjoyed it thoroughly.

Another time, when it was peak of winter, we decided to hop onto the NY city tour bus and wrapped in jackets and monkey caps, were the only occupants of the top deck of the bus to get a good view of NY by night! It was a miracle that we did not freeze.....!!!

**LEELA KANUGA**  
leelak@apparelresources.com

The drive to the airport was full of fun and even though all of us sat cramped in-between the bags, the sense of having achieved the goal was euphoric! Someone suggested *antakshari* and the first song was soon in the air...

*Musafir Hoon Yaaron...* And everyone joined in clapping and giving beats to the song by using the top of the bags as a *tabla*...!!!!

By now Bob had also got into the cheerful spirit... and as he helped us unload the luggage at the Boston airport, he gave us warm smiles as our team leader thanked him while handing over a handsome tip. ... I'm sure he'll never forget us!

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# Back to School Predictions Positive Could Bring the Shine Back to Retail

The Back to School (BTS) sales in the US for 2010 season is expected to show a burst for the first time in the last three years with sales projected to rise a 5.4% to reach a total of \$ 38.4 billion. It cannot be overlooked that BTS is a critical time for retailers, accounting for roughly 40% of all retail revenue from July to September. This year there is clear indication that BTS season will bring cheer to the retailers looking to improve footfalls. The International Council of Shopping Centers (ICSC) recently estimated that American consumers will spend \$ 38.4 billion on back-to-school merchandise in 2010, which would be a record high, in fact the highest since 1995.

The National Retail Federation (NRF) annual Back-to-School Consumer Intentions Survey predicts that the average American family will spend an average \$ 606.40 to prepare their children for a return to the classroom this year, which would be a generous budget allowance for a consuming population that has needed multiple Government rebate bribes to motivate them to open their wallets this year.

Consumers made it clear in the NRF survey that they will be doing more comparison shopping online during the 2010 back-to-school season.

Endorsing the view, a Deloitte survey says that though fewer parents plan to cut their back-to-school budgets, but they will count more on smartphones and social networking to find the best bargains during the second biggest shopping season of the year.

In the online survey, 28% of 1,050 parents of school-age children said they were planning to spend more this year on back-to-school clothing and supplies, while 17% said they would spend less



No wonder, for the first time, teen retailer Abercrombie & Fitch Co. (ANF) is tapping Facebook as a marketing tool in a promotion that gives teens a shot at Hollywood fame.

Abercrombie also launched its racy quarterly magazine for the first time in seven years, and rival Aeropostale Inc.'s (ARO) new initiatives include advertising in Teen Vogue and featuring real teens in addition to models in its campaigns. Meanwhile, Discounter Target Corp. (TGT) has increased the number of schools it offers transportation to and from for college freshmen's after-hours shopping.

"Retailers may be encouraged that fewer consumers are planning to pare back this year, although they may find that shoppers continue to be deliberate in their purchases," said **Alison Paul**, Deloitte's retail sector leader in the United States. In the online survey, 28% of 1,050 parents of school-age children said they were planning to spend more this year on back-to-school clothing and supplies, while 17% said they would spend less.

This year, 58% of respondents said they would change the way they shop for back-to-school items by buying more items on sale or only items family members really needed. Last year, 70% of the respondents said they expected to change the way they shopped because of the recession, down from 90% in 2008. "The survey indicates

that consumers' recession-induced behaviours are beginning to wane as households seek to replenish certain items and worry less about the economy," Paul said.

According to the survey, discount stores were still the No. 1 shopping destination, with 89% of consumers surveyed saying they planned to shop at discount stores for back-to-school items. 31% of consumers said they would shop at traditional department stores, up from 26% last year, and 23% cited specialty clothing stores, an increase of six percentage points over 2009.

Retailers are also going to need to be good retailers in order to capture the back-to-school dollar and experts feel that it is not going to be enough to lure back-to-school shoppers through the front door with discounts. It's the shopping experience once they're inside that will make – or break – the sale they say. Even though companies may have forgotten this retailing 101 principle, shoppers haven't. The loss of a back-to-school purchase due to poorly executed retailing fundamentals this year will be a big loss because spending sprees are finite in the post-recession consuming paradigm. If back-to-school spending predictions actually turn into spending reality, the retailers that aren't able to secure a respectable share of back-to-school spending won't be able to blame it on the economy.

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## WORLDWRAP

## Trends in This Back to School Season...

2010 is not just the beginning of a new decade of renewed interest in shopping; it's also a year when many old school trends are popping back into the "what's cool" and "what's green" scene. Today with the downturn in the economy, many people are seeking out ways to save money and become thrifty, turning what was once a thing of the past into a new trend that are sweeping the nation. These trends give teens the ability to express their individuality without overstating and they won't bust their family budgets too much.

This year's school clothes are simple in colours but rich in textures. Whether for men or women, the olden looks of distressed denim jackets can set a good fashion statement for those who wear it. The good thing about these jackets is that they look very good on slacks and even skirts so it is easy to mix-and-match with other clothing. Since dresses are now back on the trend charts, there is an increased demand for traditional prints like paisleys on 100% cotton, which is one of the biggest strengths of Indian manufacturers.

According H&M, a Swedish retailer that have moved into America's mainstream malls and has gotten very popular with teens, this fall's fashionable skirts will be below the knee. Pins, stacked bracelets and bright coloured bags are everywhere. The piled-on-thrift-store-shopping-look is in because teens are watching their budget and actually shopping in thrift stores. Natural in colour, although some are dyed, the suede and leather sneakers are what teens will be looking for this fall which indicates a very potential market for the footwear and accessory manufacturers.

## BRUCE'S INSIGHTS

# IT IS SHOW TIME... BUT ARE THEY MEANINGFUL?

This is the month of August, a busy time for the USA, with all the apparel shows coming this month, I am wondering whether the expense of exhibiting, or for that matter the expense of travelling to view them is worth it?

Here are just a few of the apparel fairs in August with many conflicting dates: World Market Center in LV, LA Fashion Market in LA, Designers & Agents Show in LA, Focus Show at the CMC in LA, Transit Show, in LA, NMB/Print Wear Show in LB, ASR Show in SD, MAGIC shows in LV, and Offprice shows in LV... These are just a few happening in California and Nevada. Internationally, it is about the same... just too many concurring fairs.

**Will new exiting FASHION at these shows be enough to generate the necessary catalyst, for the ultimate consumer to come out and start buying?**

Not all market places are as diverse as the USA, but it seems that these shows are becoming more retail consumer-specific and very expensive to be an exhibitor. The RAZZLE! DAZZLE! PARTYING! Seeing new places is all great, but (very expensive), and the servicing needed to attract potential customers to create sales is not easy... I do not believe this is taking place in these times, ( as it once did), to directly offset the costs of attending or being an exhibitor or finding a reliable vendor to deliver.

Many of those vendors showing products at the fair are not really sound financially to deliver the products, or do not accumulate the orders needed to go into actual production. Many of the larger shows now are having large sections for SOURCING, mainly for the people exhibiting, and not necessarily for the retailers that are the visitors to these shows.

True, it is very costly to cover the retail marketplace by having representatives in various territories, but now with better communications, and camera technology sending new styles to the retailer is being done daily, and the vendors are not waiting to show their products at a show.

We have many different 'LIFE STYLE' options in which to sell products; it is almost a good guessing game as to where one should set up their booth, or booths. Quick response, speed to market, fast turnover, are the key words in today's world of apparel.

It seems these trade shows are shrinking, as it has become difficult for store owners to get away from



**Bruce S. Berton**  
Executive Vice President &  
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their duties, since everyone in their own way is trying to run their business Lean and Mean. For those of us who are in the manufacturer's side of the trade shows, we are looking to shorten lead times to make sales, and having the customer come back for 'fill-ins' if our goods sell. Therefore, when we go to shows, we have to cover not just for the market we are trying to sell into, but have immediate product, to cover the needed inventory of the retailer.

Since we cover many climatic conditions and seasons, it is difficult to prepare for these shows. The concepts, both new and old, are becoming hard to show to excite new customers, and the testing of new product lines are not getting the advantages of being tested in these economic times, as retailers only have monies for tried products that are true winners. How your show monies are to be spent, is now a very important question as to what is best for your business.

Should it be spent visiting the customer directly, put on sales representatives in a given territory, used to upgrade your website, sending via email blasts advertising, all this and many more direct sales methods are an option... are these costs going to cut into the TRADE SHOWS budgets?

Consumers purchase products that appeal to them, these products are purchased from some type of vendor, and the product needs to be manufactured by some form of production; therefore how to get your product into the marketplace requires many decisions, of how to get exposure.

**This exposure can be very costly, so I am only asking is the TRADE SHOW still a viable cost in doing business?**

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Enriching lives through innovation

# Walmart Involves Suppliers in 'Sustainability 360'

...Asks them to Deliver Products that Sustain People & Environment



Walmart wants to better understand the practices of its suppliers, keep their promise to customers of delivering great products that will help them save money and live better.

**Sunil Jacob,**  
Regional Manager,  
Ethical Sourcing,  
Walmart, India and  
Sri Lanka

In the last five years the biggest direction for most retailers has been on 'sustainability' and leading the movement in the US is Walmart. Starting first with its internal processes and retail outlets, the efforts are now moving down the supply chain to involve and impact suppliers around the world. Walmart's sustainability program – 'Sustainability 360' is built on three broad parameters – to be supplied 100% by renewable energy; to create zero waste; and to sell products that sustain people and the environment. Suppliers around the world are now being asked to comply with the requirements and work within the parameters of defined goals.

With around 100,000 suppliers, 2 million associates and 8,400 retail units around the world, Walmart has the strength to create a positive change in the environment and it is now leveraging that advantage. In India, Walmart's office in Bangalore serves as Walmart's Global Procurement (GP) hub for the sourcing of merchandise from India and Sri Lanka to Walmart stores and Sam's Clubs globally. "We are currently investing in suppliers to help them improve their social and environmental compliance and we want our suppliers to increase their energy-efficiency by 20%," says **Sunil Jacob, Regional Manager, Ethical Sourcing, Walmart, India and Sri Lanka.** He further adds, "The goal is to deliver products which are free of defects or contain less than 1% defect, as we are very clear of what we want to deliver to our customers."

## GAP Promoting Denim Recycling

GAP Inc. has joined Cotton Inc.'s latest 'From Blue to Green' denim recycling initiative, which is taking place across 1,000 GAP stores in North America and Puerto Rico.

Consumers across both countries will be able to donate their old denim at local GAP stores and which will then be converted into UltraTouch Natural Cotton Fibre Insulation, and donated to communities in need.

The first From Blue to Green denim drive in 2006 collected 14,566 denim pieces across the US, more than double the anticipated amount. Since then, the project has expanded its reach through partnerships with national retailers and organizations including American



Eagle Outfitters, Bloomingdales, National Jean Company, Ernest Sewn and G by Guess.

To date, the UltraTouch Natural Cotton Fiber Insulation manufactured by Bonded Logic Inc. has recycled enough denim to create natural cotton fibre insulation for over 540 homes.

## Sears Canada Boosts Eco-offer

Motivated by a recent report from WWF Canada which says that 80% of Canadians are motivated to reduce negative impact on the environment, Sears Canada Inc. has launched 'Live Green' a new program which identifies eco-friendly products and services for customers who are looking for greener products.

The Live Green products are designed to reduce energy consumption, create a healthy home and save money. It includes little footprint pillows made from recycled water bottles; apparel collection called 'Attitude' which incorporates Lenzing Lyocell; a collection of organic cotton tees and dresses from the Jessica brand, Canada's number one selling women's clothing label; and Portico, a line of certified organic cotton towels and bedding.

Sears stores across Canada participated by turning off exterior store signs and outdoor perimeter lighting. Stores that were open during the hour also reduced their lighting and turned off lights in non-essential areas like lunch rooms, offices and stock rooms.

In 2008, Sears committed to reducing the environmental impact of its operations with goals that include recycling 90% of its waste and further reducing its energy consumption by 20% within 5 years. Since 2007, Sears has reduced its paper consumption by 30%.



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## SUSTAINABILITY

## H&M Launches Sustainable Collection



Swedish retailer H&M has launched its first collection featuring 100% sustainable materials. The Garden Collection represents a major step towards H&M's pledge to increase its use of organic products to 50% each year until 2013 and comes shortly after the company said it had no reason to believe that the organic cotton used for its garments was contaminated with genetically modified seeds.

H&M authorities said that they are aware that last year the Indian authority, APEDA, had criticized certifiers for insufficient checks of farmers' control systems for seeds and sowing. As a consequence of the criticism, Control Union conducted unannounced audits of all organic cotton farms that they certify in India.

"None of the farms were found to use GM seeds, and all farms took the appropriate steps to ensure that GM seeds were not used," said Karolina Dubowicz from H&M's press department.

"Promoting organic cotton is part of H&M's environmental strategy and we encourage cotton farmers to switch to organic cultivation. We also want to make it possible for our customers to make a greener choice, which is another reason we offer garments with certified organic cotton."

The Garden Collection, which includes floral prints and 70s flower-power designs, will be made using organic and sustainable materials, such as organic cotton, organic linen, recycled polyester made from PET-bottles and Tencel.

Working with a diverse group of stakeholders, Walmart is moving towards credible, transparent measurements that will help them reward suppliers for innovative, affordable products that are more sustainable for people and the planet. "We want to work with suppliers who share our vision and concerns," says Sunil. The tool used for measuring 'commitment' of suppliers is the sustainability index introduced by Walmart some time back, which helps to establish a single source of data for evaluating the sustainability of products. This index works in three phases: supplier sustainability assessment, lifecycle analysis database and developing a simple tool for customers.

The supplier survey includes 15 questions that serve as benchmark for Walmart's suppliers to evaluate their own sustainability efforts. The questions focus on four areas: energy and climate; material efficiency; natural resources; and people and community. The survey includes simple but



powerful questions covering familiar territory, such as the location of the suppliers' factories, along with new areas like water use and solid waste. The survey is a key step towards enhancing transparency in their supply chain.

As a second step, the company is helping to create a consortium of universities that will collaborate with suppliers, retailers, NGOs and Government to develop a global database of information on the lifecycle of products – from raw materials to disposal. Walmart

has provided the initial funding for the Sustainability Index Consortium, and invited all retailers and suppliers to contribute.

The final step in developing the index is to translate the product information into a simple rating for consumers about the sustainability of products. This will provide customers with the transparency into the quality and history of products that they don't have today. "The customer should know once they pick up a product, what is the impact of sustainability they are going to make on purchasing a product," reasons Sunil Jacob.

Walmart wants to better understand the practices of its suppliers. This helps them to keep their promise to customers of delivering great products that will help them save money and live better. They see their suppliers as partners in this sustainability drive, and the surveys and audits help them to reinforce and advance those partnerships.

## M&S Aspires to be World's most 'Sustainable Retailer'

Marks & Spencer has set a 5-year deadline to become the 'world's most sustainable retailer' as it announces 80 major new commitments under its 'Plan A' environmental initiative.

The retailer will convert all its 36,000 product lines into 'Plan A products' that have at least one sustainable quality such as carrying the fair trade logo or being produced from sustainable materials. The company would aim to convert 50% of its products by 2015 and 100% by 2020.

M&S aims to increase the number of garments its customers recycle every year from two million to 20 million, including via its existing partnership with Oxfam, which

helps to reduce the tonnage of clothing sent to landfill.

M&S aspires to be the first major retailer to ensure full traceability of all the key raw materials used in its clothing and home products including cotton, wool, polyester, nylon, leather and wood and plans to create 200 'Plan A' factories with either ethical or environmental features, or both. Farmers will be encouraged to an M&S sustainable agriculture programme.

In 2009-10 alone, M&S said 'Plan A' cut CO<sub>2</sub> emissions by 40,000 tonnes, recycled two million used garments via Oxfam and used 1,500 tonnes of recycled polyester – the equivalent of 37 million plastic bottles.



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# SCHOOL UNIFORMS SRI LANKA'S LOSS... INDIA'S GAIN?

For the past four years, clothes worth billions of pounds have been imported tax-free to the European Union under a trade scheme intended to help Sri Lanka's recovery from the 2004 Boxing Day Tsunami. Within months, however, clothes from the country could disappear from British shops, as the EU looks set to punish the Government's alleged human rights abuses in the recent civil war by withdrawing the trade benefits known as GSP (generalized system of preferences) Plus. This move will add 10 per cent to the cost of products manufactured in Sri Lanka, forcing many retailers to seek cheaper alternatives.

The three big products coming from Sri Lanka include lingerie, sportswear and school uniforms. While lingerie and sportswear are technology dependent products requiring investment and skilled workers, school uniforms are more standard products that most children's wear manufacturers can handle. The opportunity is huge as industry estimates say that Sri Lanka is manufacturing around 20% of UK's requirement in school uniforms, a market that could suffer with the withdrawal of GSP plus. Is there a possibility that Sri Lanka's loss could be India's gain?

*AO analyses the market and India's preparedness to capture the opportunity...*



The UK, which is the biggest market for school uniforms today followed by Ireland, Spain and France, and is generating business worth 450 million pounds per season. Four years ago, this segment attracted the attention of the Office of Fair Trading (OFT), which launched an investigation into the sector's competitiveness. The watchdog concluded that the uniforms should be available at high street chains rather than individual expensive shops. Since then major supermarkets are in open price war to entice lucrative back-to-school customers.

These back-to-school shoppers are keenly fought over because they tend to buy other unrelated goods when they go into a store to buy school uniforms, which is an unavoidable purchase. In this sense, school uniforms are category killers that supermarkets like Asda, Tesco, and Sainsbury's are keenly fighting for share in the market, more so as earlier leaders in the segment Woolworth are no longer in the business. M&S has a strong presence for higher-end consumers willing to pay more for school uniforms.

With the market seeing growth, suppliers to the market are looking to build capacities. Recently, Blue Max, the school uniform importer, has bought rival school wear maker 'The Banner Group' in a deal that will create the UK's biggest uniforms supplier with turnover of more than £25 million. **Nigel Plenderleith, the Managing Director of Blue Max** said school uniforms grew in

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## MARKETWATCH

## Current Status of GSP+ in Sri Lanka

Sri Lanka is a current beneficiary of GSP+, along with 15 other developing countries. Like all other GSP+ beneficiaries, Sri Lanka committed to maintain its ratification and effective implementation of the 27 conventions in the fields of human and labour rights, sustainable development and good governance and which voluntarily apply for GSP+ benefits when it applied for the scheme. Sri Lanka is a major beneficiary of the trading opportunities offered by GSP+ and in 2008, EU imports from Sri Lanka under GSP+ totalled 1.24 billion euro. The most important import products benefiting from these trade preferences were T-shirts and other clothing items, as well as fisheries products.

After temporary withdrawal takes effect, EU imports from Sri Lanka will instead be subject to standard GSP preferential treatment, under which Sri Lanka would still enjoy preferential access to the EU market for its key export items such as clothing that is at least as generous as it presently enjoys in other major developed country markets.

importance in the UK under the Conservative administration from the early 1980s to the mid-1990s. He significantly expects them to be equally important under the new coalition Government. "I think there will be an increased emphasis on uniforms, particularly for Academies, as most of these have a school uniform," he said. Other major suppliers to the UK school uniform market are Trutex, First in Class, K-12 gear, to name a few,

With almost all state schools in the UK asking pupils to follow a dress code, and nearly half of them having a strict uniform policy, the uniform market is divided into two broad segments – the customized uniforms segment that requires logos and specific colour matches, and the dress code market that works with defined broad parameters of colour, size, fit, item of clothing, etc. In the dress code market, the general colours are grey, navy blue and black. The shirts are mostly white or muted colours with no badges or logos. While the customized uniform market is serviced by importers who outsource requirements from countries like China, Bangladesh and Sri Lanka, the supermarkets, competing for the dress code market are also outsourcing their requirements from similar destinations.

The dress code market is highly price-sensitive and for the last few years, the supermarkets have been competing on price. Last year Asda stole the march by offering the £ 4 uniform for all ages, rather than a budget range simply for the youngest pupils as was the earlier trend. The retail giant claimed it would refund its customers in full if their child's school uniform fails to last until the end of the X-mas

Among the current demands in finishes is Teflon coating, wrinkle free and water resistant. In knits the basic requirement is anti-pilling. Though some items are being manufactured in 100% cotton, the most favoured fabric is a polyester/cotton blend – either 55% polyester and 45% cotton or 65% polyester and 35% cotton blended fabric which is suited to the specific demands of the school uniform market.



term. The uniform consisted of stain-proof Teflon coated trousers, an Easy iron shirt, a polo shirt and a sweatshirt. The same uniform for a 16-year-old could be bought for £ 15.25 at Tesco and £ 21.50 from M&S.

As of now India is not a major sourcing/manufacturing base for school uniforms and both Tesco and Asda, the two giants of the market do not source from the country. According to buyers India is not competitive and a school uniform (trouser + shirt), which can be sourced from Bangladesh for \$ 6.50 and Sri Lanka for \$ 7, India is manufacturing for \$ 9.00.

But where Indian exporters are finding their feet and increasingly improving performance is the customized school uniform market which has many positives working for them. Firstly, it is a small quantity high-value market – an area that is already India's core strength. Secondly, it is a good supplementary business for exporters doing children's wear, which again is a strong category from India. And lastly, uniforms are a spec-sheet business and do not require any effort in terms of developments and washes, so no extra investment is needed.

Though the business is very seasonal, with the enquiries coming in by January and orders

placed in August/September with final shipments happening in May/June, the quantity sizes and the stable nature of the business more than compensate for the same. The lead times after final approvals are generally 60-75 days. Schools reopen in September in most European countries and importers need to have their stocks in place by early August.

For the customized school uniform market, importers are consolidating the orders from different schools and then placing orders with the exporters. A few exporters have established links directly with the schools but that is a very small business. Through the importer, the consolidated business is of bigger volumes and prices are also better.

As the school uniform market picks up pace, new demands are coming in. Many schools are asking for bags made from the same fabric as a supplement to the uniform. Others are asking for track suits, house shirts, sports kits and fabric belts. Already the school uniform range has expanded to include trousers, shirts, skirts, polo-shirts (T-shirts), tunics, shorts, sweatshirts, sweaters and jackets. Ludhiana, Bangalore, Chennai and Kolkata are the main centres, but it is certainly not exclusive.

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## 'Youniform' – An initiative to cater the Indian School Uniform Market

Among the most proactive efforts to cater to the India school uniform market is 'Youniform' headed by **Harminder Sahni** and led by CEO, **Sachin Sahni**. "The mission of Youniform is to bring the modern manufacturing techniques, sizing standards, better stitching and also "all time availability" to school uniform market," says Harminder. He adds, "Uniform is part of the school's identity and that's why each school has a unique design. But the basic garments are still the same in terms of fabric, structure and styling, so it is quite practical and efficient to manufacture these in modern factories."

The company works along with school authorities and by taking contracts from school for supplying uniforms. They are not only involved in designing of visual elements like colour and logo, but are equally proactive in suggesting basic fabric, type of stitching and even the fibre content of fabrics for various functions (use of PC fabrics instead of PV or 100% polyester, usage of Lycra or Spandex content). Expands Harminder, "a school child's trouser should have elastic fibres for flexibility, as the same trouser is worn during games period too, and the buttons should be tacked firmly to withstand all pulls and pushes during normal school day, fabric should have anti bacterial treatment to avoid stink due to perspiration."

With years of experience in the garment industry and manufacturing through a large base of dedicating vendors, the team at Youniform has exposure to international parameters in quality and sizing. "We use anthropometric techniques to ensure that all children get a well fitting uniform set. In fact, we offer size sets on the same lines as leading kids wear brands like Lilliput and Benetton," says Harminder. Being a price sensitive market the pricing of uniform differs from school to school and is generally set by school authorities with suppliers only expected to comply with the standard defined.

As off now the company is working only with Indian schools, but they have already started discussion with some private schools in select international markets. "Our intention is to make Youniform a Rs. 100 crore plus business in next 4-5 years," concludes Harminder.

## Other Markets in European Countries

While the UK and Ireland are the only two countries in the EU that have a mandatory school uniform policy, in other European countries the choice lies with the school. However, in recent years more and more schools are opting for school uniforms and only recently Poland has passed legislation in favour of school uniforms though it is still to be implemented. In other countries, the market in this segment is still very small, but it is a fast growing one with a few trends that suggest that the volumes too could become bigger.

According to industry sources there is a move in some European countries like Germany and Spain to consolidate the buying of school uniforms for 50-100 schools at the kindergarten level. This consolidation would mean buying of school uniforms in bulk quantities. Another positive trend is that even at the higher education levels institutes are bringing in dress codes in the form of campus jerseys and jackets for occasions, which means more requirements!

As off now most of the European markets are controlled by large retailers and schools don't give contracts directly. Madrid-based Yatra is one such importer sourcing for the Spanish and French market. On the other hand, private schools give direct contracts and that is very niche and relatively small market, bulk business is through importers. A trouser with an embroidered logo to Europe would be around FOB Euro 3.5-Euro 4. Another growing market for school uniforms is Turkey which according to expert estimations has a market worth around \$ 3.3 billion.

## Advantage India...

According to industry watchers this is the right time for Indian exporters to make a bid for this segment as many current situations are working in its

favour. Firstly, both Bangladesh and Sri Lanka are dependent on either India or China for the fabrics and trims, so India with mills like Reliance, S Kumars and Alok who are major suppliers in this category can economize on raw material cost and take the edge. Secondly, with 'GSP +' arrangement between Sri Lanka and the EU set to expire on 15th August 2010, the country will no longer enjoy the extra competitive edge and India could prove a stronger contender for shift in business. Bangladesh is already overflowing and may not necessarily be a preferred sourcing destination.

However, the constraint lies in the 'readiness' of the Indian garment industry to grab the international business even after the GSP agreement with Sri Lanka expires. Experts feel that the development may open the potential but there aren't many Indian companies poised to look at it. Since uniform is sourced and retailed by large retailers, it is like any other garment exports deal. Actually, the average prices may be much lower than fashion apparel... a situation that many exporters will not be interested in. And in private schools where direct contracts are given by schools, the size of order may be too small to make it worthwhile for a typical garment exporter.

## Trend for School Uniforms slowly growing in the US

The US is the new kid on the bloc as far as school uniforms are concerned. Though the debate for and against introducing school uniforms is a perennial one, with the administration reluctant to push for the same, the country is slowly getting into the uniform mode. Industry estimates say that in 2008 the school uniform market in the US was worth around \$ 2.1 billion. Advocates of school policies that require students to dress to a common standard say these policies decrease violence and increase academic performance of

students who no longer have to worry about being ostracized over their choice of wardrobe. About one in four public elementary schools and one in eight public middle and high schools in the USA today have policies dictating what a student wears to school.

While private schools in the US first imported the British tradition of student uniforms to mark a student's social status, urban public schools began to adopt uniforms only in the late 1980s to reduce social pressure from fashion-savvy students. The idea spread to suburban and rural schools when President Clinton in 1996 said uniforms make schools more orderly. The second impetus came with President Bush's "No Child Left Behind Act of 2001". Retailers like Kmart swept into action. "We think uniform policies will be closely tied to this program as it is implemented and as the correlation is made between uniform policies and successful schools," notes a spokeswoman for Kmart.

Even before the political debate started, The Long Beach Unified School District in California was one of the first major school districts in the country to implement mandatory school uniforms for its students in 1994. In this district, uniforms are required in kindergarten through 8th grade in all of the elementary and middle schools. Since then many other large and small school districts have

followed suit, such as New York City, San Antonio, Miami, and Chicago. Other upcoming markets for school uniforms include Houston, Augusta, GA, Phoenix, Louisville, KY, Memphis, Texas and Philadelphia.

While there are many reasons to adopt school uniforms like – reduction in peer pressure, increase in school pride and team spirit, focus more to learning, assists in discipline problems, creates a more work-like atmosphere, less distractions and less expensive, the most fundamental and strong argument against school uniforms is that it hampers freedom of expression and inhibits individuality. However, the positive voices are growing stronger and a NPD School Uniform Study reports that households purchasing school uniforms generally spent less on children's school clothes than households buying clothing for children who attend schools with no dress codes (\$ 103.50 versus \$ 184.60). Further, families in which a child wears a school uniform are generally favourable about school uniform policies. Over half believe that besides saving money on clothes, their children are more focused on learning.

Major players in the school uniform market in the US are Dickies, Army Air Force Exchange Stores (AAFES), French Toast, JCPenney, Elderwear, Cherokee by classroom, Kmart to name a few.

## Opportunities exist in Local Market for School Uniforms

While the Top 5 countries for school uniforms are the UK, Europe, Japan, Australia and China, India is fast emerging as a potential market for organized players. India has traditionally had a culture of school uniforms, though very little thought has gone into the presentation and manufacturing of the same. But things are set to change as players wake up to the potential of this huge market which is estimated to be worth around Rs. 10,000 to 12,000 crores. Today there are an estimated 55 million private school-going students and another 172 million in public schools requiring around 5 million T-shirts and 1 million sweatshirts/tracksuits in a year, apart from the regular demand for formal shirts, trousers/shorts, skirts and blazers/coats.

While internationally, there are a number of school uniform brands besides retailers who have extended their brands to include these products, the India school uniform market is captured by small contractors working with individual schools. But with the advent of new-age international schools which are opening up across the country and the increased awareness of quality and branded apparel, a huge opportunity has emerged for potential players.

While S. Kumar's is among the first to look at this category seriously, in a unique initiative Mafatjal Fabrics is promoting their products directly at school level along with local retailers and tailors/converters. They are appointing school uniform dealers all over the country and organizing presentations & seminars for school authorities to educate the importance of school uniforms and the quality parameter. Using 3-D computer presentation with more than 100 patterns & designs with the support of more than 5000 designs in shirting and more than 200 designs and sets in suiting, the company is also ready to help schools in development of designs & patterns for uniforms.

The industry needs to look at the segment as a new business opportunity creating work both international and in India...a beginning made now will lead to bigger volumes in the future.



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**M**ade By India, a Noida-based export company has expanded its capacity by adding 160 stitching machines in the past few months. The company is also in the process of setting up an in-house fabric and garment testing lab. **Pawan Ojha, MD, Made By India** told *Apparel Online*, "We have invested Rs. 3 crores in last few months for our expansion and now our total production capacity is two lakh pieces per months. We have also

'Made By India' invests Rs. 3 crore to enhance capacities, also goes in for Fair Trade Certification

improved our supplier base. Now there are special job workers who work exclusively for us." The company, which is witnessing consistent growth, is manufacturing children's wear, knitwear and ladies wear for exports to the US, Europe and Canadian markets.

Capacity expansion became necessary as the company has added new buyers and importers to its client list who supply to big brands all over the world. To improve quality and keep check on rejections the company is also establishing a fabric and garment testing lab. On the demand of few buyers, 'Made By India' has also gone in for Fair Trade certification. Pawan is quite sure for good business in coming months.



## 'SUSTAINABLE' MARIKO OF NOIDA ADDS RESORT LINE AS A COMPLETE PACKAGE FOR THE BEACH

Differentiation in product and approach to business is spelling growth for innovative companies; Mariko is definitely one of them. The Noida-based exporter has in recent past initiated steps in sustainable efforts from getting GOTS certification to implementing systems that reduce carbon footprints. Among its latest initiatives in this direction is using only 'PVC' free sequins and embroidery material. Also instead of using polyester based labels, the company is using only cotton tape. "No buyer has asked us to specifically use these environment-friendly accessories, but we are keen to do our bit in this direction. Contrary to what people think, there is no major cost difference in using environment-friendly accessories and they are available with a number of accessory suppliers today," says **Uday Sehgal, Director, Mariko**.

For its home furnishing division, Mariko has started vacuum packing to save on transportation needed to ship the goods. Now instead of 4 cushions they are packing 8 cushions into a single carton. "We have achieved two critical targets by this one action – firstly, we are cutting down on carbon footprints and secondly, reducing the cost on transportation by 50%," says Uday.

Nearly 8 months ago, the company launched a new line of resort wear which consisted of 6 items – bags, pareos, bikinis, tunics, towels and beach slippers – all in one print design. The same



has proved to be a hit package and Mariko has already done 3 orders for the European market.

Priced at around Euro 25, the set is all made in-house with only the towels being outsourced. The company is using its strength in screen printing to give 8 print designs in 5 colour ways. "We are receiving good demand and to meet the requirement we are adding 50 more machines to our current capacity specifically for the bikinis," says Uday. Going forward the next expansion is into lingerie, which is a natural progression after beachwear.

## Dastkari Niryat: New manufacturing unit in Manesar with 200 machines

Delhi-based export firm Dastkari Niryat is going in for major expansion. The company is setting up a new manufacturing unit in Manesar (Haryana), anticipating more business in the coming years. "The new factory is being constructed on 1200 square yards and we are targeting operations by the end of this year," says **Deepak Sood, Partner, Dastkari Niryat**. The unit will house 200 machines, taking the production capacity of the company to 60,000 pieces per months.

The company has a wide product range to offer buyers, both in knits and woven and with 25% of its production still coming from job workers there is great emphasis on ensuring that no compliance norm is violated. "With each passing day compliance is becoming more important so we are working diligently in this area, for this we are in discussion with Sedex, the Supplier Ethical Data Exchange to certify and monitor our units," says Deepak. Sedex is a membership organization for businesses committed to continuous improvement of the ethical performance of their supply chains.



## Laguna Clothing Expands

Opens up a new unit in Seegekote Village, Kanakapura, Karnataka



The new unit will employ 3000 people including 2700 operators and house 1000 sewing machines

Among the first few companies instituted with 100% FDI, Laguna Clothing, the Bangalore-based shirt manufacturing giant with a turnover of Rs. 120 crores has just commenced operations at a new factory in Seegekote Village, about 7 km from Kanakapura town in Karnataka. Built in an area of 110,000 sq. ft., this new initiative would directly surge up the capacity of the company to 5 million shirts a year, an increment of 150%, with modest projections to take the company turnover to Rs. 300 crore, by 2012-13. The company will produce high-end formal shirts at the new location in collaboration with its partners – Italian mill Gruppo Tessile Monti SPA and French – Mauritian textile manufacturer Aquerelle, a part of CIEL Textiles which is already producing 10 million metres of fabric and 24 million garments every year.

Speaking on the occasion, **Arnaud Dalais, Group Chairman of the CIEL Group** (parent company of Aquerelle International) said, “Laguna Clothing leverages the strength of both group companies – that of world class fabric resource as well as shirt making capabilities to produce premium shirts from India, set to meet the needs of top global retailers and brands”.

To this added **D. Manuel Monti, Chairman of Tessitura Monti India Pvt. Ltd.**, “The launch of our new plant in India reinforces our vision to produce internationally competitive premium products. At the same time, our larger purpose, keeping in mind the policy of the Government of Karnataka, is to contribute in a small way, to the development of the rural economy by providing sustainable employment.”

Informing about the new initiative, **Sarbajit Ghose, Executive Director, Laguna Clothing** said, “The new unit is special in three distinct ways. Firstly, it is the first major intervention in Rural Karnataka. Secondly, it will produce

high-end value added shirts for premium brands like Hugo Boss Banana Republic, Saks Fifth Avenue and Charles Tyrwhitt with average prices 2-3 times more than the normal Indian shirt price, and lastly it is a 100% Foreign Direct Investment (FDI)”. The company plans to reach a capacity of 15,000 shirts a day by 2011. “At full throttle, the unit will produce 30,000 shirts a day,” adds Ghose.

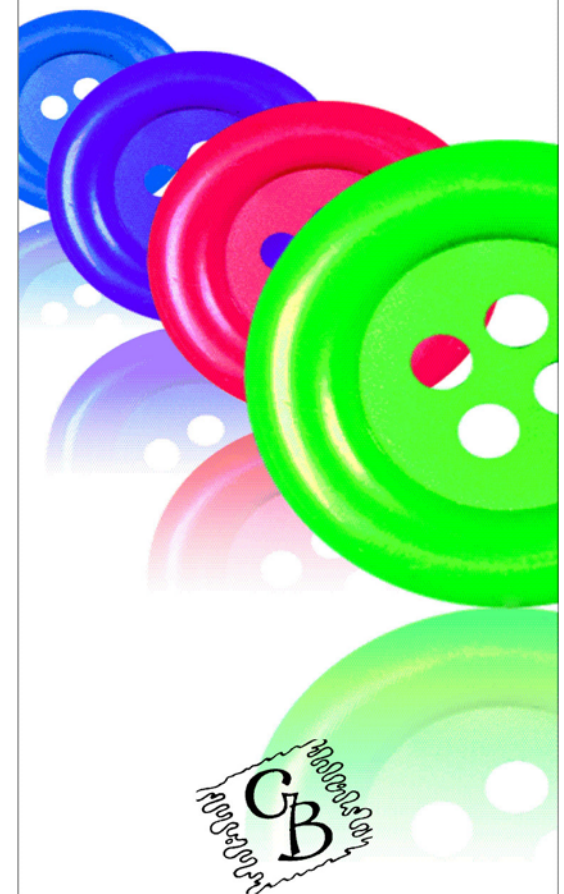
The new unit will employ 3000 people including 2700 operators and house 1000 sewing machines of which 30% are special purpose with folders, cutters, attachments and feeding devices. “We have little variability in our product, hence we have automated a major part of our work stations,” added Sarbajit. A total of 250 million has been invested in the unit. The parts preparation section of the factory is modular while for the main sewing operations, the company has chosen the conventional assembly line.

Talking about the labour development and training facility at the unit Sarbajit informed, “Labour is difficult to get in Bangalore city but here at the suburbs, a large population is unemployed. So, not only getting labour is easier but they can be easily trained as well. We have the state-of-the-art operator training module for 1.5 months followed by on-the-job training for another 1.5 months wherein the trainees will learn multiple skills of 4-5 main operations.

Laguna Clothing’s new manufacturing plant is also special as it has provisions for rainwater harvesting, recycling of water and regeneration of steam. It also houses crèche and cafeteria and provides medical facilities attached to the local hospital. The unit is expected to become a “benchmark facility” in India, and has been designed and built to enable high efficiency, quality and delivery performance, comparable to the best in the world.



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We are like rolling stones, which never gathers moss,” says **Anil Buchasia, Director, Amrit Exports**. Indeed the progressive Kolkata-based exporter of workwear is constantly upgrading its facilities and capacities to become a comprehensive solution for buyers of workwear both in soft and hard products. In a recent upgradation of infrastructure, the company has installed a new cutting machine from FK Systema, Italy. The machine will support small quantity business, which is cumbersome to cut by hand, while the bulk cutting will continue manually, informs Anil.

Besides this, the company has invested in two Shima Seiki Striker flat knit machines for sweaters, an addition to the workwear collection already being manufactured at Amrit Exports. The embroidery section has also been

strengthened with an addition of 3 new machines. Working as a consortium involving small factories in interior villages, the company has added a few more units to its folds adding another 10% capacity to its production.

In a commitment to become completely vertically integrated, the company has also begun construction of a processing house for knitted fabrics on the outskirts of Kolkata. “Though the exact capacities and other technical details are still in the planning stage, we wanted the building to be ready by the time we finalized the machines,” said Anil. Initially the company intends to process only knitted fabric/garments but going forward the processing unit will be expanded into wovens too.

## Shirt specialist Mccoy Clothing, Chennai invests in new denim plant

Specializing in casual fashion shirts, Mccoy Clothing, Chennai has recently invested in machines for jean manufacturing. To start with one line of 65 machines have been installed with specialized machines coming from Vibemac. The production capacity is targeted at 1000 jeans per day. Another line on similar structure will be installed by March 2011. To start off with, the bottoms production is mainly for Bogner, Germany, a high-end brand, in the international market and VF Brands in the domestic retail. Currently, the company is having 650 machines dedicated to shirts.

A design-driven company, Mccoy Clothing has in-house facilities for processing, which is considered one of its biggest strengths. “We have been in the business for the last 12 years and have created a niche in washes, garment dyeing and garment printing, so we felt that by leveraging this edge we can also create a positioning in the jeans market, which is also driven by processing techniques,” reasons **Mario D’Souza, Partner, Mccoy Clothing**. The company also has in-house facilities for embroidery and spray wash.

With a current capacity of 1.2 lakh pieces per month, the company is exporting 85% of its production in ladies and men’s fashion shirts to brands like Esprit, Tom Taylor, S.Oliver, Quick Silver, Bogner to name a few. “We have a current turnover of Rs. 50 crore and in the first year of running the bottom unit we are confident of adding another Rs. 8 crore to our top line,” says D’Souza. For the second year, the expectation from the new line is Rs. 12 crore.



## Bittoo Overseas, Delhi Starts Working for Fiji Island

With buyers in traditional markets slowing down sourcing in the last two years, exporters are increasingly looking at developing new markets to enhance exports. In the process many relatively unexplored markets are emerging as potential importers. Working in this direction, Delhi-based exporter Bittoo Overseas, has successfully tapped a few buyers of Fiji Island. The company has thoroughly studied the culture and lifestyle of this small island to penetrate the market. “We have made contacts with three buyers from the island and based on their feedback and our reading of the taste of the people, we have created a sample collection with use of hand block printing,” says **Ashwani Mongia, Director, Bittoo Overseas**.

With sampling almost complete, the company is hopeful that by the end of November the process of export to the country will begin. “If our efforts succeed, we will get orders of 2.5 to 3 lakh dollars per session,” informs Ashwani. Bittoo Overseas is into the manufacturing and export of women wear, so skirts, dresses and blouses will be the focus products for Fiji also. Manufacturing only woven garments, the company’s monthly capacity is 70,000 pieces from its own in-house facilities.

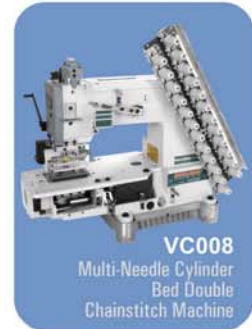
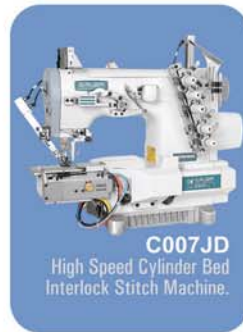
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## TEXTILE MINISTRY ANNOUNCES SCHEME FOR INTEGRATED SKILL DEVELOPMENT

The shortage of skilled labour in the industry today is acting as a major business constraint, with exporters seeking to engage consultants to train manpower for their units. To combat this problem the Textile Ministry has recently launched a new integrated skill development scheme for the Textiles & Apparel Sector, including Jute & Handicrafts. The scheme envisages an investment of Rs. 272 crore and a physical target of training 2.56 lakh persons in two years.

The initiative to be implemented on 2nd October 2010 will cover basic training, skill upgradation, advanced training in emerging technologies, training of trainers, retraining and managerial skill, all based on industry requirements. Though many details have yet to be finalized, IL&FS have been identified as the nodal agency for implementation of the scheme. "This new scheme is in line with the policy announcement of the Government, in the current Five-Year-Plan for skill development of 30 lakh persons in 5 years. In the National Skill Development Policy, a sector target of training 100 lakh persons by the year 2022 in the Textile Sector has been fixed," said **Dayanidhi Maran, Union Textiles Minister** on announcing the scheme.

In the scheme outlay of Rs. 272 crore, Government contribution will be Rs. 229 crore. Of the 2.56 lakh workers targeted to be trained, a majority will be trained through Institutions under the Ministry of Textiles, such as

Weavers Service Centres, Indian Institutes of Handloom Technology, Textile Research Associations, Apparel Training and Design Centres, etc. Only 0.36 lakh persons are projected for training through PPP mode with the help of Industry Associations, NGOs, and Agencies with the requisite expertise in conducting large scale training programmes. The strategy is to leverage on the existing infrastructure and substantial experience of all stakeholders by ensuring their active participation from the design to the implementation stages of the project. Based upon the performance, the scheme will be scaled up in the subsequent three years to meet the targets.

The targets for training have been set based on funds allocated and do not reflect any estimations for how much workforce will be required by the industry in the next two years. Currently the Textiles Industry in India provides direct employment to 35 million persons and indirect employment to another 47 million.

### The proposed scheme is empannelled with two broad components:

**Component 1** – Under this component, the training institutes under the Ministry of Textiles like power loom and weaver's service centre's, apparel training and design centre's etc. would be utilized for providing training. Further the institutes shall be required to enter into partnership with industry for part funding as well as designing of the courses. The institutes can tie up with SPV's of the Textile Parks created under SITP scheme; SPV's of the power loom mega clusters; industry associations such as CITI, SIMA, FICCI, etc. and the export promotion councils.

The Government will meet 75% of the total cost of the project and balance would be met from fee/industry contribution. The average cost per trainee (for the Government) to be borne through the scheme would be approximately Rs. 7,300.

**Component 2** – In this component, the Ministry of Textiles would operate the scheme in a PPP (Public Private Partnership) mode with the industry associations, established NGOs and Agencies with the requisite expertise in conducting large scale training programs. The implementing agency would be required to formulate a comprehensive project clearly highlighting targets, training methodology, assessment and certification, etc. Each of such projects shall target 2500 persons over a period of 5 years; and 75% of the cost of the project could be funded.

Dayanidhi Maran, flanked by Rita Menon and Panabaaka Lakshmi at the press meet



# AEPC SEMINAR ENDORSES COMMON CODE OF CONDUCT

## HIGHLIGHTS PRODUCTIVITY AND COMPLIANCE CONCERNS

In its continued effort to keep the industry abreast with latest trends in production and compliance, AEPC is conducting a series of seminars in all apparel clusters of India with focus on issues of social compliance, factory improvement, factory capacity building and productivity enhancement in apparel manufacturing. With speakers including **Anil Sahai, MD – T Group**; **Lakshmi Menon Bhatia, Director – GAP**; **Rajesh Bheda**; and **Roger Thomas** presenting their opinions on the above causes, it was a motivating and interactive session at the Gurgaon venue that brought forth many questions from the audience leading the seminar into a reflective mode.

Focusing on the 3 key opportunities of productivity, quality and human development in the apparel sector, Rajesh Bheda highlighted in his presentation how improvement in productivity can lead to overall contentment among the workers as well as the staff, emphasizing that the present incentive system motivates the worker to work longer instead of faster and smarter. Redefining the HR's role from simply being a record keeper to being a good listener for the workers, he further explained how the problems of absenteeism and turnover can be reduced to a great extent by just listening to the operator's problems.

Moving on to issues outside the floor, Lakshmi Menon Bhatia talked of a number of global trends in apparel manufacturing which have taken a toll on the labourers. Talking of the fast changing global market and its strong after-effects, she emphasized how contract labour will soon become a nightmare for the Indian apparel industry if the issue is not handled properly. "Shortage of labour is a reality which is a great opportunity for us to change the way we work. Instead of bringing the workers to the industry, the industry should go where the workers are. Many Indian states which have a rich resource of labour, are being still unexplored," she further added.

The eloquent Anil Sahai gave an informative presentation on 'Disha' which is being undertaken by AEPC for strengthening the

social and environmental compliance mechanism in the supply chain. For this a common compliance code is being formulated which hopefully will be a national code and eventually is expected to be internationally recognized. He spoke of the implementation of the initiative and the vision behind this program. "It has become imperative for the garment industry to follow a common code of conduct to create an image in the international arena that we are a labour-friendly industry," said Anil.

with cost reduction on the floor. The audience interaction session mediated by **Praveen Nayyar, AEPC's Senior Vice-Chairman** saw a lot of participation on issues of the necessity of overtime, child labour and shortages of labour, leading to very intense discussions. The AEPC officials opined that a common compliance code will assure that the buyers do not ask for more if the factory has implemented these codes. The initial investment for any SME will be approximately Rs. 50,000 but the



Finally moving back to increasing productivity on the floor, Roger Thomas observed how fabric can be saved in any factory just by paying close attention to a number of factors in the cutting and sewing room. Emphasizing on lean manufacturing he brought to light a number of issues on the floor that go unnoticed but if taken care of can substantially reduce the company costs.

Thus the entire seminar starting from productivity enhancement, going through global trends and social compliances finally ended

returns will hugely benefit them in the long-run felt the officials.

"These seminars are very educative for small exporters who are not yet compliant," said **HKL Magu, MD, Jyoti Apparels**. He emphasized that AEPC is doing a lot to educate the industry and if people adopt the learning, they will definitely benefit. "The Government wants even the smaller factories to be socially and environmentally compliant; hence it is giving grants to educate them," he concluded.

Exporters at the AEPC seminar listening very keenly as Lakshmi Menon Bhatia, Director – GAP addresses the audience

# ADVANCING OPTIONS IN KNITTED FABRICS

## SILK BECOMES A VIABLE PREPOSITION

The world produces over 17 million tonnes of knitted textiles and apparel – representing one-third of the global textile market. The output is forecast to grow by 25% over the next 10 years, reaching more than 21 million tonnes. With such a huge scope of growth, the knitting industry is striving hard for new developments in knitted fabrics.

**T**he scope of application for the knitting industry is fast increasing and from the domain of casual fashion the segment is getting into more unconventional areas. In fact, designers are discovering that knitted goods now offer more scope in couture than ever before. Even industrial and protective wear can be a very promising segment for knitted fabric industry after its wide use in sportswear where certain added nanotechnology functionalities have been engineered into the garment for quick dry and breathability, which is especially important with sportswear. A new wave of nanotechnology allows knitted clothes to resist spills and wrinkles, and wear longer between washes.

Leading Italian manufacturer of warp and weft knitted fabrics SITIP SpA Industrie Tessili, has introduced Acqua Zero range of 'non-wetting' fabrics at recently held Outdoor show in Germany. Acqua Zero non-wetting fabrics are said to be durable and unique in that they have inherent stretch but can still retain its water repellency over long periods of time. Best known for its warp knitted fabrics, SITIP also has the capacity to produce approximately 100,000 kg of circular knitted fabrics per month.

Though much research is being done to improve performance of knitted fabric, the technical textile industry is largely depending on woven and nonwoven fabrics; knitted

fabrics are being used mostly by the automotive industry for filters, etc.

### Buyers' Demand in Knitted Fabrics

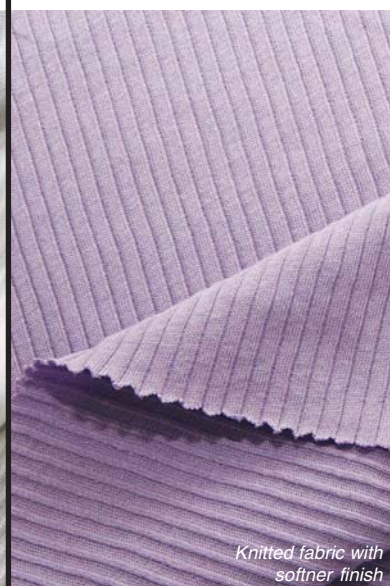
The technological advances are providing producers with the flexibility to offer small bespoke, customised orders tailored to specific customer requirements at competitive prices. Says **Amit Aneja**, a Textile Technologist catering to the Indian mills and buying offices, "Buyers are now asking for basic knits with lot of different fibre blends, like cotton/modal, modal/lycra, viscose/lycra, etc. Viscose fibre is very much in demand and lot of buyers are asking for 100% viscose and viscose/cotton blended fabric."



*Knitted fabric with biowash finish*



*Cotton viscose blended knitted fabric*



*Knitted fabric with softner finish*



*Mercury's gold finish + Heat set knitted fabric*



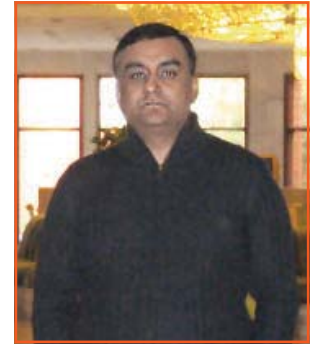
Amit Aneja



Ramesh Menon



Tajinder Sachdeva



Sanjeev Sood

**Reeccha Dhawan, Merchandiser (knits/woven/ladies/kids), New Times** says that basically textures are in for knitted fabrics. What is really going strong with major brands are 100% viscose single jersey 110-150 gsm, 100% cotton single jersey 110-150 gsm, 100% viscose heather single jersey 110-140 gsm, 100% cotton organic/non organic slub, 60% cotton 40% modal single jersey. "Waffle fabrics for coming fall season is really hot along with yarn dyed jersey is evergreen in auto-loom and feeder stripe stripier," states Reeccha.

Triburg dealing with two of the biggest importers in the US for menswear has received bulk booking for varied knitted fabric from the buyers. Shares **Sanjay Shukla, Head Knitted Fabric Division, Triburg**, "In menswear we are working on 80/20 cotton/poly basic fleece, 100% cotton basic interlock, 100% cotton flatback rib and 60/40 cotton/rayon intimate and mechanical blend fabrics." Talking about giving variety to fancy fabrics in knits he adds, "Single dyed cotton/poly fabrics with stripes/jacquards, light weight fleece, slubs in different textures are being given."

As per **Vipin Sharma, Fabric Manager, VF Asia**, heavy bust fleece and indigo washed look is in for knitted fabric. Compact fabrics in 30s-40s with little stiffer construction are also gaining popularity. "Nylons with wicking properties are in great demand and cordura yarn for durable knitted fabric is being tried," shares Vipin.

### Trendy Finishes

According to Amit, buyers are getting very particular on the finish of the fabric, they are asking for Bio wash Finish, Gold Finish (more smooth surface area) with less pilling on the fabrics. "Carbonizing is hot; anti microbial is also getting popular for inner wear," says **Ramesh Menon of DMI**, a well known fabric importing company.

Giving her feedback on latest finishes in knitted fabrics Reeccha says, faded look is very much in, which means pigment over dyed garment with enzyme wash are popular with all ages. Some acid washes and also some burnout looks are very much in demand that is using very bright colours initially, and then after the burnout washing it to make it faded. Sublimation prints on knits are in for ladies, potassium effect and Swede finish across various weights of fabrics are going strong. Organic fleece material and distressed look is in along with thermo-chromatic material in fleece and jersey. Sherpa qualities and faux fur qualities are some new developments in knits.

"Softness in menswear fabrics with sueding softener wash are some of the great developments in knits and giving tough competition to China these days," says Sanjay.

### India Weak in Printed Knitted Fabrics

Prints on knitted fabric is also getting popular, however India is weak in printed knitted fabric so a lot of converters are getting the printed knits from China

and Taiwan. According to **Tajinder Sachdeva, MD, Mercury Fabrics**, there are a very few knit manufacturers in India, barring a few in Ahmedabad who can handle printed knits so the exporters are importing the same.

Anticipating higher demands, Tajinder is all set to get into manufacturing of printed knitted fabrics. "I aim to manufacture printed spandex fabric which has huge demand in the international market but great dearth of quality suppliers. From day one, the unit has been designed to produce printed fabrics," avows Tajinder, producing 250 tonnes of knitted fabric per month and now going for added capacity which would produce 350-360 tonnes of fabric per month.

### Knitted Options in Silk

Cotton and wool blended with other yarns have so far been the main stay of knitting but now silk is being tried. Central Silk Technological Research Institute (CSTRI), a research wing of Central Silk Board, Bangalore is a leader for such efforts. Silk knitting is a special area demanding expertise. "Knitted fabrics have tremendous technological advantages over the woven fabrics in speed of production, easy care and comfort. It is adaptable to all types of end uses viz. casuals, sportswear, winter wear as well as formal wear," shares **Subrata Roy, Director (I/C), CSTRI**.

"A lot of tests have been done on silk knitted fabric to ensure its

strength and feel," says Roy. The mechanical characteristics of knitted silk fabrics are prepared by using salt-shrunk, fibre-dispersed and resin-treated silk yarns which are determined based on the Kawabata Evaluation System for Fabrics (KES-FB) which is commonly used to measure fabric's mechanical behaviours related to hand, meaning-knitted fabrics made from the processed silk yarns are flexible and elastic, have a higher resilience, and are soft with stretching properties.

Constructions like plain jersey, waffle, interlocks, jacquard and pique are all being done to knit silk fabrics. The lighter silk knits of different structures cater to a wide range of both men's and women's wear. In spite of being light and sheer, these knits are comfortable, luxurious and durable. The heavy weight jacquard knits cater to the upholstery and furnishings category because of its abrasion and pilling resistance.

The competition comes from the Chinese silk industry, which has been in this area for quite some time, while for India it is a relatively new area, however Roy feels that India has the advantage of access to raw material and technologically advanced knitting sector along with cottage sector which handles smaller volumes. **Sanjeev Sood of AVS Fabrics**, a Gurgaon-based importer whose major market for imports is China, suggests that India should explore the possibilities in the heavy weight varieties, especially the Jacquard knits, as Chinese are into light weight knits.

# PARADIGM SHIFT IN TEXTILE CHEMICALS

## ...MAXIMUM PERFORMANCE WITH MINIMUM ENVIRONMENTAL FOOTPRINT

The challenge for chemical companies today lies in bringing a stream of new and improved value-added products into the market in order to strengthen existing product lines, as the innovations in finishing will only be able to open up new markets and new horizons for the textile industry. While functional finishes like water and oil repellents, flame retardants, handle modifiers and specialty softeners are being manufactured by most of the chemical companies, there is urgency to constantly improve their performance properties for better results. Environment-friendly, biodegradable, comfort or health-oriented products in the field of auxiliaries and finishing chemicals are gaining importance.

With sustainability being the current concern, the question remains as to how far the industry can go to achieve measurable improvements in sustainability with the existing choices of dyestuffs and chemicals. Aware of this critical question, chemical companies are striving to make sustainable products mostly targeted at reduction of energy, water consumption and effluent, which is the biggest concern of the textile industry. Says **Dr. Milind Vaidya, Commercial Leader, Textiles Dow Corning, India**, "Fashion and comfort still remains the main drivers for

selecting fabrics, but today's consumer also considers the ecological effects of producing these fabrics."

Similar views came from **Rohit Khanna, Regional Sales Head – South Asia and Middle East, Huntsman**, "At Huntsman we strive to offer every product and process with a lower environmental impact as opportunity lies in the widely discussed issue of greener manufacturing. Our recently launched High IQ finishes are built to last and save water and energy during the garment's lifetime for a clearly lower environmental impact."

Huntsman TE currently spends about 5% of the total sales earnings for R&D and much of these R&D efforts centered around chemical products featuring environmental and economical benefits. These products are designed to help users reduce water and energy consumption by 30-40% during textile processing. They also help sellers of end apparel products to meet their consumers' expectation for a reduced environmental footprint.

Some of the most innovative and environment-friendly finishes have been done for denim fabric



Dow Corning's patented powder technology allows processors to combine certain stages in denim processing like fading & finishing into single step, saving both resources and time



The demand for WFF (Woven Functional Fabrics) is steeply rising especially for protective wear, sleeping bags, tents and school uniforms



which has witnessed the maximum innovations in finishes to give it diverse look and feel. The traditional method of processing and finishing denim to make it soft and wearable consists of many separate stages, all requiring large amounts of water and energy. These stages include removing the size material from warp yarns in woven fabrics, using enzymes to get a faded look, bleaching to make it whiter and lighter, dyeing to change the colour of the fabric, and treating the fabric with chemicals and/or softeners to impart attributes such as wrinkle resistance, stain resistance, and UV protection.

However, chemical companies are getting newer technology to reduce the burden on our natural resources. Dow Corning's patented powder technology allows processors to combine certain stages such as fading and finishing into a single step, saving resources as well as time – thus offering solutions to several environmental challenges that confront industries. This innovative powder-based technology minimizes the need for water and solvent, since it offers the benefits of silicone in a dry form. It also reduces the use of biocides that are typically required to maintain the stability of the emulsion. "Leading international apparel firms are keen on incorporating this silicone technology into their manufacturing processes to create textiles for their environmentally conscious customers," says Dr. Vaidya.

Resil has come up with a product called 'Greenule' which reduces the consumption of water, energy and time. The company has also launched an enzymatic bio-scouring product which reduces the consumption of harmful chemicals like

caustic and acid and thereby reducing the effluent load and the TDS levels informs, **Hitesh Wadher, AM-Garment Technology, Resil Chemicals**, which claims to be one of Asia's largest processors of silicones for textiles and has expanded its product range to cover finishing, pre-treatment and speciality processes. The company enjoys consultant status in textile finishing and has a fully dedicated Application Research Centre (ARC), for ongoing R&D. "These are the products for the immediate future which will change the entire concept of processing," comments Hitesh.

Certainly saving of resources contributes more than the savings of dyes and chemicals cost and chemical companies are determinately moving in that direction. DyStar practices "Resource Management" and helps its customers in minimizing their total process cost. "Saving of energy and water is not restricted to one product, but to the entire process from pre-treatment to finishing. We market the products like scour/dye and finish in one bath, (package offer), allowing the user to save water/energy and process time, in turn allowing increase in production," affirms **Rajesh Balakrishnan, Managing Director, DyStar India**.

### Functional Finishes Demand on Rise

Finishes can do wonders to an ordinary fabric from making them shiny or matt, soft or stiff to giving them performance properties. Today the direction for finishes is not only on hand feel, fashion appeal and daily application properties, but also on how they can be used as a substitute for specialized fibres with inherent functional properties. The best example for

this would be replacing the conventional bulletproof material Kevlar with ordinary fabric treated with bulletproof finish making it as effective as Kevlar.

In this direction, American and Chinese researchers have recently developed a new technique that uses a regular cotton T-shirt to make a hard but flexible, more comfortable and lightweight bulletproof vests. To create this revolutionary product, the researchers dipped the cotton T-shirt into a boron solution enriched with nickel and heated to 1160°C. The treated fabric retained the lightweight and flexible properties of cotton while taking on the toughness and rigidity of the boron solution at the nanoscale.

According to Rohit Khanna the demand for Woven Functional Fabrics (WFF) especially with protective wear for military and paramilitary forces is steeply rising. There is also a demand for waterproofing and insect repellent finishes for tents, sleeping bags and nets. "Even antimicrobials for innerwear are in demand in this segment. Stain repellents, for example for school uniforms, are definitely a future market," remarks Rohit.

For safe, effective and durable protection in clothing, Huntsman has recently introduced a new Flame Retardant Finish. Pyrovatex® Exp which represents a new generation of environmentally safe flame retardant finishes for 100% polyester. Designed for decorative fabrics, curtains, upholstery and sun shades, this finish is a phosphorous based technology which provides optimal protection to people and property by delivering protection of the highest flame retardant standards.

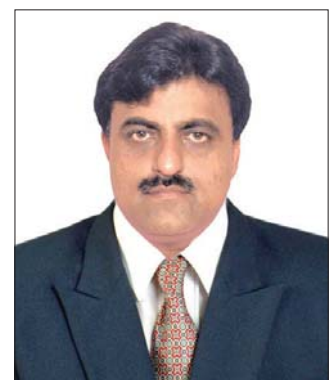
For stain repellence and soil release Huntsman has recently launched a new product specifically formulated for



**Rohit Khanna, Regional Sales Head, South Asia and Middle East, Huntsman** – "We strive to offer every product and process with a lower environmental impact as opportunity lies in greener manufacturing."



**Rajesh Balakrishnan, MD, DyStar India** – "Saving of energy and water is not restricted to one product, but to the entire process from pre-treatment to finishing."



**Anjani Prasad, Head of Textiles Chemicals, Clariant Chemical India** – "Our USP is our product efficiency and ecological profile. Our product packages help in achieving the strict parameters required by the market and controlling the utility cost."

## TEXTILE UPDATE



**Sunil Chari, Director, Rossari Biotech** – “Our R&D centre is constantly innovating products and processes to reduce pollution load, save water, energy and cost.”



**Dr. Milind Vaidya, Commercial Leader, Textiles Dow Corning, India** – “Fashion and comfort still remains the main drivers in fabrics, but today’s consumer also considers the ecological effects of these fabrics.”



**Hitesh Wadher, AM-Garment Technology, Resil Chemicals** – “Our eco-friendly products for the immediate future will change the entire concept of processing.”

cotton called Oleophobol® CP-C which is the next generation oil, water, and stain repellent finish for cotton fibres, synthetics fibres and their blends. Liquids bead up and roll off, and spills can be blotted up quickly with a clean, dry absorbent cloth.

### Health & Wellness Finishes Picking up

There is a growing market for health and wellness finishes enhancing quality of life. “There is a huge drive towards human and environment-friendly textiles,” states Balakrishnan. DyStar was one of the first companies to get its dyestuffs approved to the GOTS standard for the specific use on organic cotton. The low impact dyes from DyStar meet the demanding requirements of the organic textile standard and provide the basis for achieving a wide range of shades by all application methods (exhaust dyeing, continuous dyeing, cold pad batch dyeing and printing).

DyStar has introduced some very interesting health and hygiene related finishes including an anti-smell finish called Evo Fresh CDL which is a second generation modified β-cyclodextrin liquid product very suitable for finishing process, stable bath with most softeners and all resins with better anti-smell effects. The other product in this category is wellness finish called Evo Care AVS made of permanent silicones and extracts from aloe vera plant. This finish has soft and comfortable handle, skin caring properties along with moisturising effect and anti-stress finish.

In wellness category there is anti-ageing finish Evo Care Vital which contains a combination of natural products and combination of Vitamin E and F. It protects the human skin against premature ageing

through noxious environmental effects and dangerous UV radiation. It improves the feeling and comfort when wearing the garment.

Huntsman product High IQ® has freshness effects in two new varieties to better meet the needs of today’s modern society. With High IQ® Freshness on demand, the wearer can actually choose a scent to match his mood, while High IQ® Active Freshness has built-in antibacterial properties to protect the wearer.

Clariant too has introduced hygiene finishes in association with Sanitized brand. The company has introduced Easy Clean & Body Comfort Finish which helps easy removal of stains during laundry and better comfort properties to the wearer. The company has also recently launched two new silver based antimicrobial products with high wash durability informs **Anjani Prasad, Head of Textiles Chemicals, Clariant Chemical India**.

In this category Resil has come up with micro encapsulated fragrance finishes on garments and fabrics to give the moisturising effect which enhances wearer’s well being.

### Finishes for Changing Fabric’s Feel

Merely converting fibre into fabric and then to a garment is not enough today. The real value addition is providing variety of ‘look & feel’ to the fabric.

Rossari Biotech has recently introduced Drapesof BSV Paste, a unique bodying agent with stiff/hard body properties, applicable on all types of fabric. This product requires low curing temperatures and allows no sticking on padding, mangles with good washing fastness. “Combination with cross-linking

agents produces good wrinkle recovery with improved tear strength and there is no change of fabric tone on finishing due to transparent film formation,” points out **Sunil Chari, Director, Rossari**.

For P/V and P/C suiting fabrics Rossari has launched Marvel bounce Liquid, an innovative micro silicone softener for extraordinary bounciness and inner softness which is a durable finish suitable for pad and garment applications. For extremely soft and smooth handle on all kind of fabrics Rossari’s Rosil Feathertouch Liquid is a perfect product. Its micro silicone softener for providing outstanding surface softness and inner softness resembling to feather touch effect on acrylic wool blend and fancy polyester feather yarn.

DyStar new offer in cool touch finish is Evo Soft ELP and Evo Fin PUS. Both the finishes provide cool and soft handle to cotton and its blend with polyester. The wearer is more comfortable and more relaxed claims the company.

In this segment, Clariant has launched Enhanced Strength Improvement System (ETSI system). This finish achieves a high performance in anti wrinkling property and at the same time balances the strength of the treated fabric, this finish is suitable for home textiles and apparels. With its Appretan Range of products, Clariant is creating novel effects on denim by giving soft coatings, shine coatings and artificial leather look. The chemical companies are undoubtedly dedicated to researching and developing the optimized solutions for a more sustainable planet while retaining a clear focus on helping customers cut back on costs through ongoing process efficiency optimization.



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# INDIAN CARPET INDUSTRY ON A GROWTH PATH

## HANDMADE CARPETS STILL THE DRIVER

The spotlight is back on the Indian carpet industry with the segment seeing good growth and projection of a 25% increase in exports in the current Financial Year. The recent endorsement by the US Department of Labor to the intense efforts being made by the Carpet Export Promotion Council to eradicate child labour by keeping the segment out of the recently released EO listing which unfortunately includes the garment industry as an abuser of child labour, has been a major boost to the industry. Today, the carpet industry is on a high and players are looking for substantial growth in the coming years.

**W**ith a world market share of 30% in handmade floor coverings, India ranks number one as a producer and exporter of handmade carpets and other floor coverings both in terms of volume and value with about 49% of total exports going to the US alone, 21% to Germany and around 30% to the rest of the world. An important segment in home fashion, the industry is seeing growth despite global slowdown and in the single month of June 2010 India's

carpet export registered an increase of 22% to \$ 3.60 million owing to good orders from US and Europe.

Apart from the US and Europe, the carpet industry is also receiving good orders from the Middle East and Latin America. The CEPC (Carpet Export Promotion Council) predicts a rise in exports of around 25% to \$ 650 million from \$ 525 million for the year 2010-11. "Exports of carpet from India have consistently seen growth and with global economic situation getting better we are very positive that

major strides will be made in the coming months," says an upbeat **Shiv Kumar Gupta, Executive Director-cum-Secretary, CEPC**. "This is the right time for India with its very wide product offering to increase business, as China, Nepal and Pakistan – all competitors in the segment – are facing a lot of internal problems at present. In fact, we are expecting a lot of orders by Jan. 2011," adds **Sanjay Gupta, Rug & Home**, a Buying Agent sourcing carpets from India.

The steady growth of the carpet industry has been ably supported



Hand tufted and shaggy carpets are popular from India

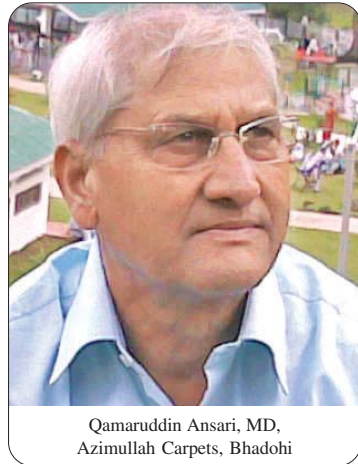


A traditional design in carpet from Qaleen Alishan

by the CEPC, which has been playing a very proactive role in promoting the industry. One of its major activities in recent years has been the representation of the Indian Carpet Industry in India and abroad particularly before the US Government to apprise the US Government was regarding welfare measures for carpet weavers and steps taken for elimination of child labour in the carpet industry. The very fact that the council has been successful in keeping the industry out of the EO listing despite still having a recorded 3.42% child labour, speaks volumes for the concerted effort to monitor and educate the industry on the harm that the stigma could do to the trade, as also the conviction that convinced the DOL that the efforts are genuine and in the right direction. The industry is confident that the development will provide a major boost to the industry.

Today Indian carpets have built a reputation for exquisite designs, elegance, attractive colours and workmanship. International buyers like Ikea, Walmart, Carrefour, Metro, JCPenney, Pier 1, TJ Maxx to name a few are sourcing mostly silk and woollen carpets from the country, but off late, cotton, jute, bamboo, grass and coir carpets are also gaining popularity, driven by increased focus on sustainability.

Mainly centered on the regions of Bhadohi, Agra, Jaipur and Kashmir, the industry has seen a shift away from hand knotted carpets to more price-effective options. In fact, during the last few decades, hand-tufted carpets have emerged as one of the major growth categories in carpets and Panipat, already a major home fashion centre has emerged as another noteworthy carpet manufacturing base. "Hand knotted carpets are slowly moving out of the market as



Qamaruddin Ansari, MD,  
Azimullah Carpets, Bhadohi

production cost has gone very high and with shortage of labour, it is very difficult to ensure timely delivery of these carpets," says **Qamaruddin Ansari, MD, Azimullah Carpets, Bhadohi.**

Azimullah Carpets is presently exporting to USA, Turkey and Gulf countries. He adds that Shaggy carpets in woollen or polyester are the most moving product for the industry today. In fact, the categories that recorded maximum growth last FY were handmade synthetic carpets, which have increased by more than 94%, followed by handmade woollen carpets, rugs and handmade silk carpets.

One of the biggest strengths that the Indian carpet industry has is that it can manufacture all kinds of carpets. Most other countries have specialized in only particular type. "India is much diversified in its product offering as compared to any other countries having carpet industry. Shaggy carpets were initially offered only by Turkey but now India has emerged as the biggest exporter of shaggy carpets in the world. Recently, Rajasthan has innovated a new kind of carpet in which the base is made of wool and the motives made of silk, this kind of carpet has become a big hit in the American market," shared **Sunil Bazaz, MD, Qaleen Alishan, New Delhi.**



Sunil Bazaz, MD,  
Qaleen Alishan, New Delhi

However, the industry is not without its problem areas. "The major problems we are facing today are no different from other export industries like sharper prices offered by the buyers and fluctuations in the exchange rate," says Ansari. To bring in fresh labour to a traditional craft, the industry has appealed to the Government to open weaving training centres as getting trained weavers is one of the biggest problems that the industry faces today. Another area that needs attention is designs. "We are mostly still working with traditional motifs and with increased competition we are now feeling the need for design support to make our collections more contemporary," says **Shanti Kumar, Dugar Exports, Rajasthan.**

Not everyone agrees that Indian carpets need to get 'contemporary'. "The designs produced by India are liked by customers across the world so there is no need for setting up of design studios for carpets," reasons Sanjay. He however stresses on the need to be price 'right'. "The American market in which 90% of the buyers of carpets are youngsters is very price-sensitive. These customers are demanding transitional designs in wool and silk, and for the low end segment the demand is for all over loop rugs and carpets with prints," adds Sanjay.

## India's biggest Competitor...

Iran also registers growth The growth in the carpet export sector is just not registered by India. Iran, the master of Persian rugs with intricate designs and one of our biggest competitors, has also recorded a growth of 37% in the export of hand-woven carpets as against the value of its last year exports. The US is the largest purchaser of Iranian carpets, registering \$ 17 million worth of imports, during the first three months of this year.

## Carpet Trends 2010

- Plain, solid colour carpets continue to remain as the first choice for the buyers worldwide.
- Colours in the form of rich vibrant plums, hues of blues and greens and aubergines are the latest hot favourites.
- Patterned floor coverings mainly geometrical and flowery are in.
- Textures such as tweeds with dainty motifs and optional stylish borders are also a big hit in many markets.

## EU Import Analysis – Jan.-April 2010

# EUROPEAN UNION REGISTERS DECLINE IN IMPORTS DURING JAN.-APRIL '10 OF (-) 2.71% EXPORTS FROM INDIA ALSO DIP (-) 4.09%

Though retail sales in the European Union is witnessing an increase on a month to month basis, with clothing retail sales climbing 2% in the UK, the impact is negated by the fact that consumer confidence is at an all time low, mostly due to EU's debt crisis. In the UK, the new Government has already announced a series of spending cuts and a possible rise in the VAT which is expected to depress consumer spending further. The declining interest in purchasing non-essential products is reflected in the downward trend in apparel imports by the EU during the period Jan.-April '10. During this period both value and volume were down by (-) 2.71% and (-) 6.77%, respectively. The UVR was surprisingly marginally higher at Euro 14.65 (per kg of fabric equivalent), last year the UVR stood at Euro 14.01. Both knitted and woven category saw increase in UVR with knitted segment showing UVR of Euro 13.12 and woven garments registering UVR of 16.33.

In a year when prices are very critical to determine where the business is going, UVR of most destinations took a beating. However, among the 6 countries under review, two of them Vietnam and Sri Lanka saw positive movement in the UVR. For Sri Lanka the knitted segment has been the growth driver with UVR being a very high Euro 20.24 (per kg of fabric equivalent). The segment registered 27.76% growth in value and 19.07% increase in quantities. The woven segment was less effective and

exports dipped in value terms by (-) 2.33%, though volumes did increase 8.22%. The UVR for this segment under the review period was Euro 2.99 (per kg of fabric equivalent), down from Euro 3.32 (per kg of fabric equivalent) in the same period last year.

In the meanwhile, the average UVR for Indian apparel exports during the defined period was Euro 16.89 (per kg of fabric equivalent), down from Euro 17.42 (per kg of fabric equivalent) last year. Interestingly, while the UVR for knitted garments saw an increase from Euro 13.90 (per kg of fabric equivalent) last year to Euro 14.09 (per kg of fabric equivalent) this year, woven garments registered decline in UVR from Euro 21.56 (per kg of fabric equivalent) to Euro 19.89 (per kg of fabric equivalent). During this period Indian exports were down in both value and volume of (-) 4.09% and (-) 1.07%, respectively.

China during the review period Jan.-April '10, witnessed a marginal downfall in its shipment to the European Union of (-) 0.93% in value, however, the country witnessed positive growth in quantities of 5.26%. The average UVR were down from Euro 14.34 to Euro 13.50.

Bangladesh continued to see a decline in its exports in terms of value with (-) 1.33% downslide, though its volumes increased 6.79%. The downslide in value was in the knitted category while there was growth in woven

garments of 2.49%. The average UVR was also down from Euro 9.63 (per kg of fabric equivalent) to Euro 8.89 (per kg of fabric equivalent).

Vietnam witnessed declines both in the value and quantities of (-) 1.25% and (-) 6.54%, respectively. The products from Vietnam are however commanding better prices than last year with

UVR of Euro 14.48 (per kg of fabric equivalent) as against Euro 13.71 last year.

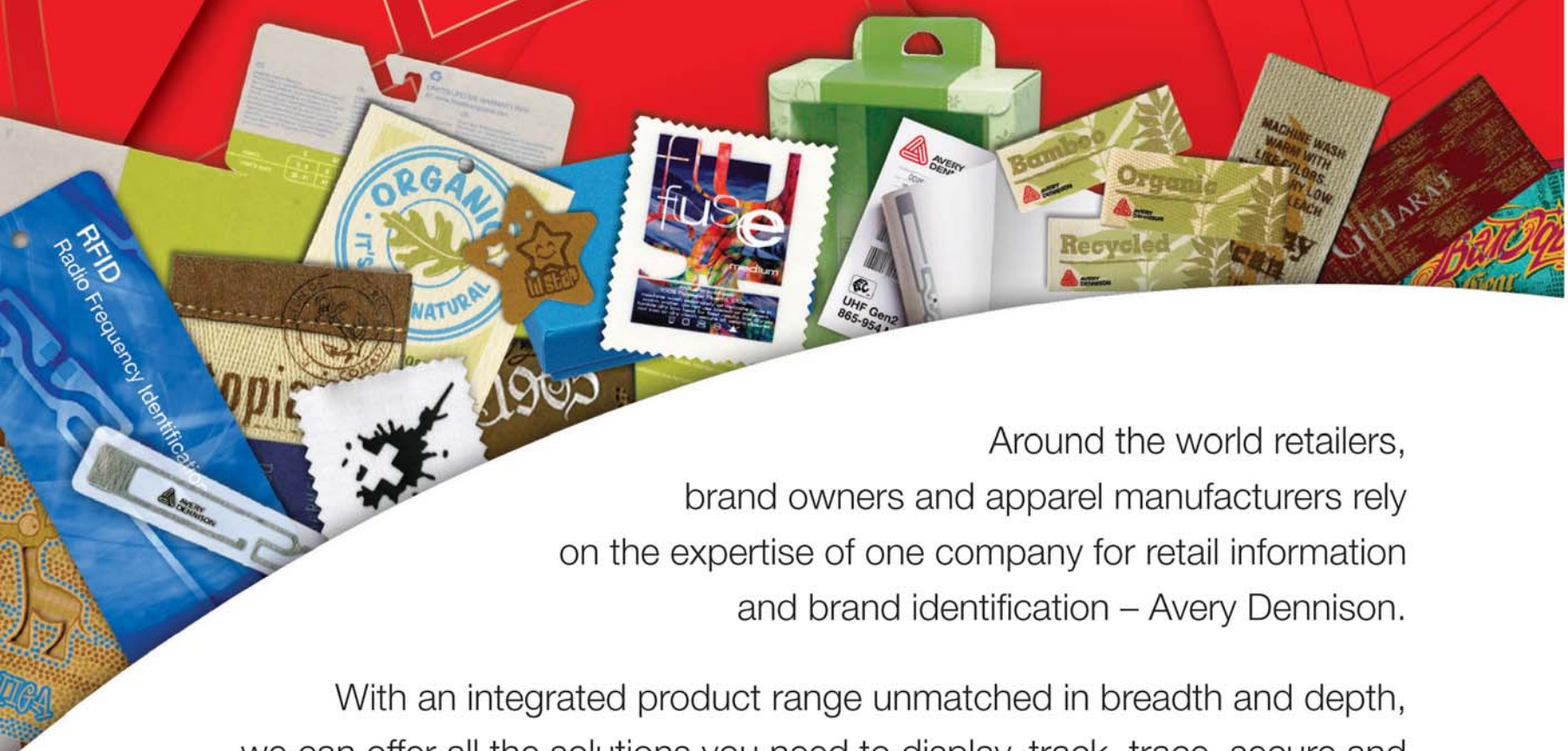
The UVR for Pakistan in the review period was just Euro 7.39 (per kg of fabric equivalent), down from Euro 8.33 (per kg of fabric equivalent) last year. The country saw major decline in value of exports by (-) 10.32% though volumes did see a slight increase of 1.05%.

## EU GLOBAL APPAREL IMPORTS — JAN.-APRIL 2010

TYPE OF APPAREL	Jan.-Apr. 2009		Jan.-Apr. 2010		% increase/decrease	
	Qty	Value	Qty	Value	Qty	Value
<b>WORLD</b>						
Knitted	721.05	8985.54	686.31	9006.06	-4.82	0.23
Woven	689.09	10766.98	625.23	10211.65	-9.27	-5.16
<b>Total</b>	<b>1410.14</b>	<b>19752.52</b>	<b>1311.54</b>	<b>19217.71</b>	<b>-6.99</b>	<b>-2.71</b>
<b>CHINA</b>						
Knitted	275.86	3867.81	294.04	3778.55	6.59	-2.31
Woven	344.26	5025.75	358.68	5032.38	4.19	0.13
<b>Total</b>	<b>620.12</b>	<b>8893.56</b>	<b>652.72</b>	<b>8810.93</b>	<b>5.26</b>	<b>-0.93</b>
<b>INDIA</b>						
Knitted	52.14	724.55	49.43	696.46	-5.20	-3.88
Woven	44.41	957.54	46.09	916.78	3.78	-4.26
<b>Total</b>	<b>96.55</b>	<b>1682.09</b>	<b>95.52</b>	<b>1613.24</b>	<b>-1.07</b>	<b>-4.09</b>
<b>BANGLADESH</b>						
Knitted	132.58	1178.05	139.21	1136.57	5.00	-3.52
Woven	60.15	676.99	66.61	693.83	10.74	2.49
<b>Total</b>	<b>192.73</b>	<b>1855.04</b>	<b>205.82</b>	<b>1830.40</b>	<b>6.79</b>	<b>-1.33</b>
<b>SRI LANKA</b>						
Knitted	12.41	234.11	14.78	299.11	19.07	27.76
Woven	61.55	204.18	66.61	199.43	8.22	-2.33
<b>Total</b>	<b>73.96</b>	<b>438.29</b>	<b>81.39</b>	<b>498.53</b>	<b>10.04</b>	<b>13.75</b>
<b>PAKISTAN</b>						
Knitted	17.27	120.74	18.10	101.25	4.82	-16.14
Woven	21.34	200.85	20.91	187.16	-1.99	-6.82
<b>Total</b>	<b>38.61</b>	<b>321.59</b>	<b>39.02</b>	<b>288.41</b>	<b>1.05</b>	<b>-10.32</b>
<b>VIETNAM</b>						
Knitted	10.50	98.17	9.38	97.27	-10.69	-0.91
Woven	18.70	302.10	17.91	297.98	-4.22	-1.36
<b>Total</b>	<b>29.20</b>	<b>400.27</b>	<b>27.29</b>	<b>395.26</b>	<b>-6.54</b>	<b>-1.25</b>

Qty &amp; Value in mn Kg &amp; Euro

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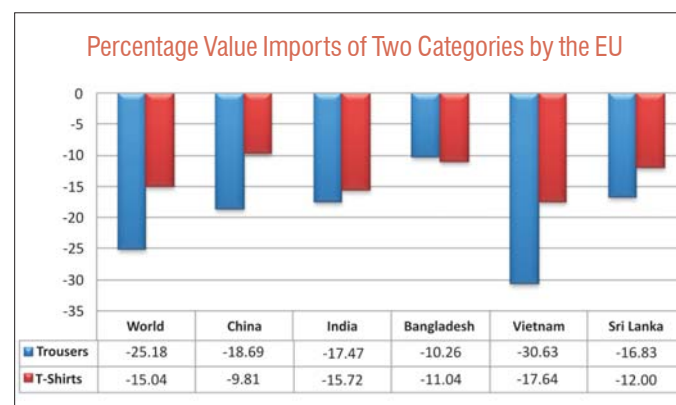
## EXPORT STATISTICS

## EU Import Analysis – Jan.-April 2010

### Analyzing the item-wise value of imports by the EU from various countries in Jan.-April 2010, some key findings are:

- The major losers during this period were trousers, ladies blouses, foundation garments, jackets & blazers and sweaters with (-) 25.18%, (-) 24.04%, (-) 22.92%, (-) 21.71% and (-) 19.44% decrease, respectively.
- In China most categories registered negative growth. The three positive growth segments were suits/ensembles, ladies dresses and babies wear with 10.80%, 6.27% and 3.42% growth respectively. Some major losers were trousers (-) 18.69%, ladies blouses (-) 16.64%, undergarments (-) 15.31% and jackets & blazers (-) 14.94%.
- For India, the gains were mostly negative with only two categories registering positive value increase – suits/ensembles with 13.53% rise and babies wear with 9.14% surge. The categories which saw maximum decline were foundation garments with (-) 76.96% downfall, ladies blouses with (-) 21.41% decline and men's shirts with (-) 14.92% dip.
- Bangladesh could record value gain in four products – undergarments with 90.92% increase, nightwear with 40.71% rise, foundation garments with 20.97% upswing and babies wear with 33.96% upsurge were the gainers... In all other products the decline is substantial with jackets & blazers leading the downfall with (-) 51.46% decline.
- Exports from Vietnam were up in value in only one product – undergarments by 56.74%. The biggest losers were legwear, ladies skirts, babies wear and men's shirts which were down (-) 54.80%, (-) 40.66%, (-) 37.81% and (-) 31.21%, respectively.
- For Sri Lanka, the major gainer was babies wear with 98.91% increase and major loser was sweaters with (-) 20.41% decline in value. Undergarments which are usually a strong category from the country also saw a decline of (-) 9.63%.

All products imported by the EU continued to see a fall in value in the defined period and not even one category could register growth. This is a clear indication that prices are dipping very sharply in the EU and exporters have to be prepared to work at lower prices ■



## ITEM-WISE VALUE INCREASE IN APPAREL IMPORTS BY EU: JAN.-APRIL 2010

APPAREL TYPE	Total Imports by EU		Exports to EU									
			China		India		Bangladesh		Vietnam		Sri Lanka	
	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010
Babies Wear	767.99	735.77	542.00	560.53	67.97	74.19	40.15	53.78	5.99	3.73	11.04	21.97
Foundation Garments	546.97	421.60	304.95	272.73	6.30	1.45	7.46	9.03	15.28	11.09	43.04	43.05
Jackets & Blazers	875.58	685.46	506.64	430.94	13.77	11.29	8.36	4.06	23.49	18.69	2.55	3.29
Ladies Blouses	1,079.95	820.38	440.59	367.28	269.72	211.97	32.29	27.21	16.54	10.83	18.97	15.17
Ladies Dresses	1,136.65	1,096.88	608.93	647.11	179.14	176.49	19.29	20.81	8.55	8.13	13.08	10.70
Ladies Skirts	446.81	361.87	219.95	198.03	49.28	40.39	14.04	13.45	8.88	5.27	9.31	10.63
Legwear	483.46	463.29	186.98	182.51	5.98	5.23	0.71	0.55	2.30	1.04	6.25	5.82
Mens Shirts	2,215.05	1,869.91	750.20	719.34	274.23	233.31	286.69	267.01	70.39	48.42	15.60	19.66
Nightwear	1,106.19	895.44	590.20	526.09	120.39	103.37	33.41	47.00	14.15	11.87	47.79	56.35
Suits / Ensembles	117.04	117.07	64.25	71.19	4.27	4.85	2.02	1.82	0.83	0.84	1.28	1.73
Sweaters	3,338.99	2,689.91	1,951.73	1,838.87	81.34	70.82	400.50	382.68	32.08	28.35	26.75	21.29
Trousers	5,099.09	3,814.99	2,203.89	1,792.08	158.23	130.58	434.97	390.36	129.07	89.54	90.00	74.86
T-shirts	2,673.54	2,271.45	719.30	648.75	265.94	224.13	523.46	465.68	22.60	18.61	54.70	48.13
Undergarments	259.81	214.12	160.61	136.03	16.31	15.84	4.09	7.82	1.98	3.10	19.62	17.73

Value in mn Euro

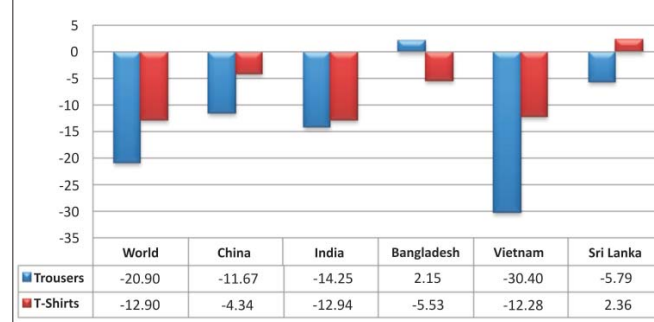
## EU Import Analysis – Jan.-April 2010

**Analyzing the item-wise imports of the EU on quantities from various countries under review in Jan.-April 2010, some interesting facts that emerged are:**

- All other categories imported by the EU recorded a downfall. The major losers in quantities were trousers with (-) 20.90% decrease, ladies blouses with (-) 18.42% fall, suits/ensembles with (-) 18.63% decline, legwear with (-) 16% fall and suits/ensembles with (-) 12.82% downslide.
- In China ladies dresses, ladies skirts and babies wear saw maximum increase in quantities in the review period with 31.81%, 17.23% and 12.86% gains, respectively. The key losers were trousers with (-) 11.67% downslide, T-shirts with (-) 4.34% dip and suits/ensembles with (-) 4.14 decline.
- From India, three categories recorded quantity gains – ladies wear with 10.95% rise, ladies dresses with 5.46% increase and undergarments with 6.73% upswing. Surprisingly, ladies blouses, one of the strongest categories to the EU saw quantity decline of (-) 26.53%. Men's shirts too saw a decline of (-) 19.12%.
- Bangladesh could record volume gain in many products, the three major being foundation garments, undergarments and nightwear with 60.64%, 82.09% and 57.11% rise, respectively. The decline in jackets & blazers, legwear and suits/ensembles were noteworthy with (-) 47.36%, (-) 46.17% and (-) 13.31% declines, respectively.
- Exports from Vietnam were up in volumes only in undergarments with 78.63% gains. The biggest loser was legwear, which was down (-) 66.67%.
- For Sri Lanka, the major gainer on quantities were suits/ensembles, babies wear, men's shirts and jackets & blazers with 95.66%, 95.45%, 49.12% and 27.76% increase, respectively. Major loss was recorded in sweaters and undergarments with (-) 10.09% decline and (-) 6.84% slide in quantities.

In terms of quantities there were increases in imports by the EU in only two products – ladies dresses of 12.46% and babies wear by a marginal 3.32% ■

Percentage Quantity Imports of Two Categories by the EU



### ITEM-WISE QUANTITY INCREASE IN APPAREL IMPORTS BY EU: JAN.-APRIL 2010

APPARELTYPE	Total Imports by EU		Exports to EU									
			China		India		Bangladesh		Vietnam		Sri Lanka	
	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010
Babies Wear	47.35	48.92	34.05	38.43	4.03	4.48	3.45	4.87	0.32	0.23	0.77	1.50
Foundation Garments	16.61	15.10	11.73	12.81	0.08	0.03	0.32	0.51	0.30	0.27	0.85	0.86
Jackets & Blazers	40.06	34.86	27.61	26.64	0.65	0.53	0.87	0.46	1.47	1.16	0.18	0.23
Ladies Blouses	39.15	31.94	15.44	15.71	10.52	7.73	2.21	2.07	0.87	0.62	0.81	0.72
Ladies Dresses	38.43	43.22	20.71	27.30	6.08	6.41	1.59	2.01	0.53	0.48	0.75	0.66
Ladies Skirts	20.96	19.65	11.40	13.36	1.93	1.61	1.06	1.35	0.77	0.46	0.73	1.03
Legwear	64.49	54.17	25.95	28.81	0.58	0.57	0.15	0.08	0.23	0.08	0.53	0.48
Mens Shirts	130.64	120.07	44.95	50.48	16.27	13.16	29.23	30.13	4.31	3.17	0.73	1.09
Nightwear	93.31	83.28	52.14	54.53	12.50	11.33	3.91	6.15	2.97	1.50	2.44	2.63
Suits / Ensembles	12.94	11.28	10.23	9.81	0.41	0.27	0.21	0.19	0.12	0.10	0.08	0.16
Sweaters	195.80	173.68	104.88	110.12	5.51	5.07	35.29	36.92	2.47	2.03	1.64	1.47
Trousers	390.85	309.15	206.02	181.98	10.72	9.19	45.60	46.58	10.08	7.02	6.99	6.58
T-Shirts	214.23	186.60	56.85	54.38	18.41	16.03	71.15	67.21	3.23	2.84	3.09	3.16
Undergarments	22.47	21.16	16.02	16.36	1.59	1.70	0.44	0.81	0.15	0.26	1.06	0.98

Quantity in mn Kg

## Krishna Lamicoat Largest Manufacturer of Specialized Paper Products for the Garment Industry takes 'Sustainable' Route to Business

Led by the dynamic AMAR CHHAJER, Krishna Lamicoat, known in the industry for its specialized paper and films for the garment industry has consciously chosen to take the 'sustainable' route in all areas of operations as a way of life and work, creating a cutting edge which differentiates company and product from other competitors. The commitment begins with its newly constructed factory on the outskirts of Bangalore which has been built from bricks made on site of local mud using the natural terrain as a landscape. On a recent visit to the picturesque factory at Tavarekere, *Team AO* found many interesting initiatives that speak clearly of the direction to become a sustainable player in the supply chain.



Modern and process driven work culture at Krishna Lamicoat



The indigenously made perforating machine is the fastest in the world claims Krishna Lamicoat

A walk through the factory of Krishna Lamicoat is a journey of learning, where much hyped concepts like 5S, Kaizen, TQM and Lean have been imbedded in every corner without the fuss. The neat and clean factory with well groomed workers, modern machines and well documented processes, speaks volumes of the systems that have been put in place for a work culture that is testimony to the commitment to all three spheres of sustainability – environment, social and economic. The detailing extends to safety parameters and international style of stacking paper in vertical format using forklifts.

Workers in the factory are encouraged to share ideas and in a unique initiative they are educated during working hours. Hindi speaking workers are taught Kannada and local workers are taught to read and write in Hindi. To motivate the workers, performance-based competitions are held at the factories and winning teams rewarded. "We engage our workers and create an environment where targets are achieved without the struggle," says **Ashok Chhajjer**, son of the Founder, and vibrant Director of the company.

The ISO 9001:2008 certified Krishna Lamicoat with over four decades of industry exposure is

in fact the first company to start manufacturing of specialized paper products in India. "We were the first to replace imported paper products for the garment industry with indigenously made products that too made by machines that have been developed in-house. Our perforating machine is the fastest in the world giving 10 tonnes of output per day," says a proud Ashok. With two such machines, the company is in a position to give a complete container load of 20 tonnes in just one day.

Expanding to meet the increasing requirement for plotter papers and films, Krishna Lamicoat currently has an annual capacity of 6000 MT's consolidated over 50,000 sq. ft. factory in 3.25 lakh sq. ft. land. The product range includes plotter and marker paper, heat seal plotter paper, graph paper, interleaving tissue separator, pattern board, overwrapping film, resealing polywrap, perforated underlay paper, underlay paper and sequential labels.

With associate companies in Colombo, Kolkata and Delhi, the company claims to be the largest manufacturer of CAD/CAM paper products in India today. "The nearest competitor has capacities and infrastructure of only one-third of what we have," claims Ashok. Matching

international standards in quality, the company is also exporting its specialized products to 15 countries across the globe, including Sri Lanka, Bangladesh, Dubai, Mauritius and Fiji Island.

Working constantly to give better products to the industry, Krishna Lamicoat is increasingly forward and backward integrating to bring as many processes as possible under its control. "We are not only manufacturing the product, but also the packaging material, adhesive and stickers that are used for the final product. Now the next move would be to manufacture our own paper, which is definitely on the cards," says Ashok. The company has an in-house testing lab to ensure that all the raw material going into the final product meets stringent demands of users worldwide.

A new product diversification for the company is wardrobe paper that comes in 5 metre rolls and is treated so that it last longer than the usual paper used to line shelves before storing clothes and other goods. "One can even place a hot iron on the paper or spill acid/alkali on it and nothing will happen," says Ashok. The response to the new product has been very positive and the company is

looking to market the same in both the domestic and international arena.

### Sustainable initiatives...

Just recently, the company has tied up with a supplier in Singapore for one-sided printed paper which is being reused to produce perforated paper. "The width of the paper is small and we are joining them together with adhesive to get bigger widths as required for cutting table" says Ashok. Though the products made from such waste paper are not competitive for the Indian market, there is a huge potential for exports to the European Union. "The cost of products made from virgin paper is very high in Europe, whereas the same product with no compromise on performance will be available at almost 30% less using one-side printed paper," says Ashok. He is very confident that the product will be a fast moving one in the west as it has the double edge advantage of price saving while being environment-friendly. Currently negotiations are on to supply these recycled products to some brands in Europe.

The company is also looking to support the industry in disposing of its waste paper for recycling by offering free



**"We engage our workers and create an environment where targets are achieved without much struggle"**  
**— ASHOK CHHAJER**

industrial shredding facilities at site. A pilot run is being conducted at K. Mohan and will soon become available to any industry that would like to get rid of its years of stacked records, but not at the cost of confidentiality. "We offer to shred any organizations paper in front of their representative free of cost and in return we collect the shredded paper for reuse," avers Ashok. All waste

paper collected by the company is made into bundles and when it becomes a truck load it is sent back to the paper mill in barter for fresh paper rolls. "This way for every 10 tonnes of paper, one tree is saved from being cut," argues Ashok.

With a vision to be 100% sustainable, the waste at the factory is collected in a systematic manner – three bags are placed in the factory, one for plastic films, second for craft paper and third for white paper. Exporters that Krishna Lamicoat is working for are also being encouraged to follow a similar procedure for easy collection and disposal. "It is a win-win situation for all, exporters get rid of their waste without any extra effort and we are able to recycle the waste for various uses," reasons Ashok.

No wonder, the company is today a leading name in its segment. However, Ashok is perturbed by the unscrupulous competitors compromising in quality and quantity leading to corruption in the industry, which makes it difficult for principled companies to work on 'product strength' alone. "Export house owners need to investigate what is being purchased for different departments and ensure that only the best quality is accepted," concludes Ashok.

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The graduating batch of Indian Institute of Fashion Technology recently created history by establishing a world record for the most garment designs displayed in a fashion show within 2 hours and 45 minutes, bagging a place in the Limca Book of World Records.

The fashion show Fashionite 2010 held in Bangalore saw a total of 542 garments made by 82 designers showcased.

Arthy Singh, Senior Editor of Limca Book of Records was present and monitored the record making event. The event was choreographed by Prasad Bidapa, a well known name in the fashion industry. Hon'ble State Minister for Textiles, Sports and Youth Services Goolihatti D. Shekar was the chief guest for the day. Also present on the occasion were Dr. Prabhu Dev, Vice-Chancellor, Bangalore



The record breaking fashion show at IIFT. The show saw 542 garments walk the ramp in 2 hours and 45 minutes

University; Panduranga Nayak, KAS Commissioner, Textiles and Handlooms; Subhash Tiwari, Director, Shahi Exports; Dr. K. N. Ningegowda, Chairman, Dept. of Apparel Technology, Bangalore University; and Vijay Kumar Nirali, Project Director, Suvarna Vastra Neethi.

At the event, Umme Salma was awarded as the best designer. Her design theme Ocean Jazz was inspired by life under water. Mahavir was the 1st runner up designer for his theme Royal Journey inspired by Dasara Procession, followed by Pratibha as second runner up with the theme

'small wonder' inspired by Japanese fan. B. Vedhagiri, Director, Indian Institute of Fashion Technology thanked all the students, designers, faculty, staff, models and choreographers for having enabled Indian Institute of Fashion Technology to achieve the world record.

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# Supply Chain Management Challenges in the Apparel Industry

The supply chain management system of the Apparel Industry has undergone dramatic changes in recent years. One thing that these changes make clear is the fact that individual manufacturers, suppliers, or retailers alone will not dominate the logistics market of the future. The winners will be networked enterprises with the knowledge and capability to integrate, optimize, and collaborate across their entire supply chain faster, better, and more profitably than other supply chains. In the Apparel Industry, the basis of competition is no longer limited to companies and their products, but rather their performance as an integrated supply chain.

**A**nura Paravithana, Commercial Manager at Cargoplan

International, a major supply chain service provider of the Apparel Industry, agrees that the companies with best-in-class supply chain management practices achieve 10-30% superior on-time delivery performance than average performers, while spending 30-50% less in total supply chain management expenses. The savings potential is substantial; it can range from 3% to 7% of revenue, not to mention the competitive advantage gained!

Supply-chain thinking has traditionally been efficiency-oriented – A cost reduction sort of thing – whereas the new approach of value-chain thinking is organization effectiveness-oriented. When companies emphasize effectiveness, they aren't necessarily trying to trim down costs, but rather "to create the highest value for the customer". Today's challenge is to construct a supply chain that is robust enough to tolerate volume without breaking down, and agile enough to respond to rapidly changing demands.

The major challenges faced while managing the supply chain for the apparel industry are many. But the most important are flexibility, shorter lead times, use of technology, coordination between logistics provider and exporter, custom delays and infrastructural bottlenecks. The logistics managers in export

companies as well as the logistics service providers mutually complain about the problems that occur on account of appalling infrastructure in the country leading to delays in shipment. Hurdles related to the custom clearance and the taxation process have been raised every now and then by the industry. The whole route to obtain clearance is quite cumbersome.

With time the intricacies of supply chain management are becoming more and more difficult to handle. "As we have clients in different parts of the world, we require flexibility in the systems and services to combat the difference in time span across the globe and varying demands of the end customer," says **Sugesh Kumar, Logistics Head, Aster Apparels.**

**Surajit Sarkar, Regional Manager – North (Shipment & Logistics) at Forbes and Company** says that selecting alternative measures is a wise choice if your current logistics provider isn't delivering on-time then one should send shipments by choosing priority options available with the bigger firms or spend a few extra bucks to be delivered as priority.

The supply chain management problems can be solved with proper understanding of the critical factors that affect the logistics management in the Textile and Apparel Industry. Anura lays great emphasis on the fact that the apparel firm should choose their channel partners wisely. Lack of



Today's challenge is to construct a supply chain that is robust enough to tolerate volume without breaking down, and agile enough to respond to rapidly changing demands

cooperation, coordination or capability among channel partners will reduce possibilities for all. To build efficiency, together the parties should maintain transparency in system. Key data should be provided to channel partners.

The retail, apparel and textile sectors are increasingly linked as a channel through information and distribution relationships. Thus, the channel rather than the firm becomes the basis for competition. It is most likely that those enterprises that adopt the advanced supply chain management systems

quickly will enjoy a competitive advantage over those who are slower so to do.

Sugesh suggests that the performance should be linked to measure and reward parameters both internally and externally. It should be based upon key strategic factors like lead times, quality, delivery, information, cost and flexibility.

Leading exporters are now adopting the use of softwares which are central to the complete system between the exporter, logistic service provider and the buyer so as to help overcome the problem of time lag between the transfer and receipt of information. Technology is being considered as the 'perfect fit'. Warehouse Management System (WMS), Product Lifecycle Management (PLM), and inbound logistics Transportation Management Systems (TMS), and even business intelligence functions under a single umbrella, the ERP software developers have become one-stop-shops for many shippers looking to simplify their supply chain software.

Export firms which have been successful with their supply chain mechanisms confess that forecasting is the backbone behind their efficiency, as even a slightest delay may cause losses in lakhs of rupees. Indeed, for apparel manufacturers, the key to success is the ability to introduce sophisticated information links, forecasting capabilities and management systems into one seamless chain.



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## TJX Opens its Liaison Office in India

The TJX Companies, Inc. which operates as an off-price retailer of apparel and home fashions in the United States and overseas opened its liaison office in Delhi recently. Till now TJX was sourcing through Li & Fung and WECA. TJX India office has **Shuchi Bhagat** as its Director Sourcing and another 8 people looking after sourcing and quality control.

TJX stores offer apparel, including footwear and accessories; home fashions, including home basics, accent furniture, lamps, rugs, wall decor, decorative accessories, and giftware; jewellery and accessories; men's and juniors' offerings; children's furniture; seasonal merchandise; and other merchandise. The retailer is already sourcing both apparel and home furnishings from India.

The company founded in 1956 and based in Framingham, Massachusetts, operates its stores under the T. J. Maxx, Marshalls, HomeGoods,



A. J. Wright, Winners, HomeSense, and T. K. MAXX trademarks. Presently it has 890 T. J. Maxx, 813 Marshalls, 323 HomeGoods, and 150 A. J. Wright stores in the US; 208 Winners, 79 HomeSense, and 3 STYLESENSE stores in Canada; and 263 T. K. Maxx and 14 HomeSense stores in Europe.

Among the retailers doing well, The TJX Companies, Inc has announced that it will open 6 Marshalls stores in Canada in 2011 with more stores possible in the long-term.

## JCPenney India Office Gets a new Country Head

The search for a new leader to head the India operations of US Department Store JCPenney has ended with the appointment of **Mridul Dasgupta**, a NIFT pass out. He took over as Country Manager on 1<sup>st</sup> August 2010. An Ex-Triburg Team Leader, Mridul has just completed a 7-year stint in Indonesia with Busana Apparel Group. He has also worked with Finesse Exports and Gokaldas Images in the early phase of his career.

Taking charge from Adil Raza, who has been heading the Indian operations of JCPenney for a long time, will be a real challenge and with the years of experience that Mridul brings in from both the manufacturing and sourcing side will definitely stand him in good stride. The *Apparel Online Team* extends its congratulations to Mridula and wishes him the best of luck for new assignment.

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