

RNI No. 67969/98
DL-(S)-17/3202/2009-2011
Annual Subscription Rs.1200/-
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January 1-15, 2010

Pages 60

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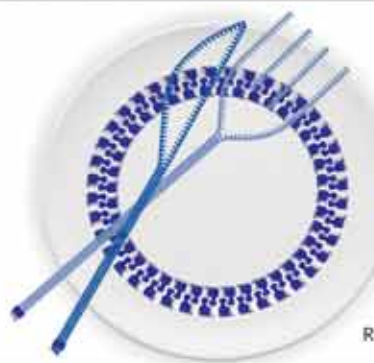
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Printing
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- **EYES & EARS**

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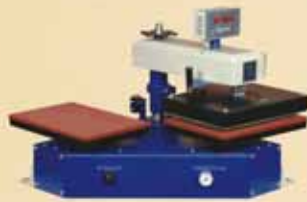
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MINDTREE - FOOD FOR THOUGHT

Q The prices of cotton have been increasing continuously over the past few months. AEPC has already approached the Government for support as it fears that exporters will either default on deliveries or ship out at losses. Has your business been affected? What are the measures that you have taken to overcome this crisis?

■ I had to reject a huge order because I am not sure what to quote as prices of fabrics are increasing almost on a daily basis. This problem can only be sorted out if the Government restricts the cotton exports and gives preference to domestic consumers first. They have to understand the fact that if they are earning through cotton exports, they can earn much more if the cotton is allowed to move up the value chain. If things continue this way, the country will lose substantial business in garment exports which will go to competitors.
Sudhir Dhingra,
Orient Craft, Gurgaon

■ The prices have gone up immensely due to which we have to raise the prices of the final garment. On the other hand, the buyer is asking for lower prices. The cost of production has gone up by 20-30% which we have to pay from our pockets. We have stopped taking new business and for the one's we are committed to we are completing them but at lower margins.
Palani Swamy,
Vipro Garment, Tirupur

■ The prices of fibre and yarn have gone up, prices of fabric has moved up..., why should the price of the garment not move up? We have done our costing depending on previous price and

all of a sudden if the price goes up, then the buyer has to understand that we cannot work on the same costing. Export fraternity needs to get united and fight the cause. How can we work on the previous costing?
R. N Maheshwari,
Haryana Texprints
(Overseas) Ltd., Faridabad

■ The rise in price of cotton has been a major setback for many exporters. It's difficult to survive in a situation where production cost along with labour cost is so high. We have been losing on the new orders that are coming as the buyer is unwilling to pay higher price for the product and for orders

which we have already taken up, we are ending up paying from our own pockets.

Gyan Mittal,
Kanhaiyalal Kalyanmal,
Jaipur

■ The price is a big problem for the exporters as the economics does not match. The price of the fabric has gone up by 25-30%, which is a major part of the garment cost. This price rise has hit our margins badly. At present, we are shipping goods at negative margins. We are unable to quote prices to the buyers as we don't want to lose on them by quoting higher price which is based on our present production cost. We, for now,

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are just doing sampling for our buyers and will be quoting prices in January.

Vikas Jhavar,
Texorange Creations Ltd.,
Mumbai

■ The yarn prices have hit the industry badly in the last two months. If it continues like this then it would be a grim problem as we are not able to transfer those prices to our customers and that's really damaging for our business. Our customers are expecting us to absorb the prices, I do not know how much can we absorb? Unless equilibrium sets in, where the buyer too shares the costs, I guess the industry will face tough times.

Sharat Jain,
Mangalam Ventures Limited,
Faridabad

■ The rising cotton prices have made situations worse for the exporters to survive in this

industry. Most of the businesses have finished up as most of them manufacture cotton garments. The buyers are moving to other countries like Bangladesh and Vietnam where they can get products at a cheaper rate. The industry has been affected badly due to a sudden hike in the prices.

Ravi Poddar,
Cheer Sagar, Jaipur

■ The margins have squeezed considerably as the prices of cotton rise. We cannot ask the buyer for higher prices as he will never be willing to pay the same for the garment. So, in the end, it's the exporter who has to bear the high cost of production. As a measure to curb the losses, we have raised the efficiency of work which in turn will also help us to complete the orders on time.

Ashish Wahi,
Sunlord Apparels
Manufacturing Co. Ltd.,
Noida

■ We have been adversely hit by the hike in prices of cotton as we are seeing a fall in number of orders. There are talks in the market that it is a political set up and the fabric is being hoarded. We have become helpless as all we can do is to wait for the prices to come down so that we can tap the export market again.

Rakesh Baboo Sadh,
The Design Sangrah,
Noida

■ We surely are suffering due to the rise in prices of cotton. The production cost has gone up considerably. In order to overcome this situation, we have been putting the orders on hold which have higher involvement of the cotton fabric. Moreover, we have now started using viscose more extensively, instead of cotton.


Jeetendra Kaushal,
JK Exports,
New Delhi

MINDTREE QUESTIONNAIRE

In the New Year AEPC is ready to welcome the new Chairman after the dynamic Rakesh Vaid, what agendas would you like the new Chairman to adopt for the betterment of the industry?

Do you think AEPC is proactive in supporting the industry on critical issues?

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When the Editor of 'Lighter Moments' invited me to contribute a story..., the one that immediately came to my mind was one which of course had very light moments connected with it... but was not necessarily a funny story. In our business there is stress related to almost every step in the supply chain... right from the time of style developments followed by costing negotiations... and delivery, lead times... to executing an order... followed by audits in customers warehouse... and finally waiting for a good sales report from the store...! Till the garment has not reached the ultimate customer..., there is anxiety about its sales!

In the middle of all this... my involvement in organic orders for couple of our customers came like a breath of fresh air as it offered the opportunity to explore into a new area.

The year was 2007. Organic yarn and fabric was making waves in the garment industry and a lot of our customers from USA and Canada wanted their products to be classified organic to boost up their sales... and also add more value to their image as responsible retailers. Just as living wages are the talk of the trade today, it was organic fabrics which were hot that year.

LIGHTER MOMENTS

THE PULL OF DIVINE

CONTRIBUTOR: PRATIBHA MUKHI, MERCHANDISE MANAGER, PURE COTTON INDIA



Pratibha and her colleagues at the Vasudha Centre in Indore



Pratibha Mukhi

Realizing that we had to be a part of this revolution and to understand its nitty-gritty no one could have been a better guide for us than the pioneer – Pratibha Syntex with their Vasudha Organic project at Indore. We had in the past seen presentations from them in our office at Li & Fung... but it was decided for a team of three of us from our division to visit Indore and see the complete organic story..., starting from visit to organic farms and how cotton is cultivated and grown in an organic environment... and then moves up from fibre to fabric... to garment in the end...!

I and my two colleagues took an early morning flight from Delhi Airport to Indore... It was a small aeroplane that wobbled with the slightest whiff of the wind...! The lone kid inside the plane was enjoying himself with his candies running across the floor with every tilt of the aircraft... It was fun watching him and all the passengers managed a smile in spite of the air turbulence, looking at the kid enjoying himself as the flight went wobbly...!

The flight landed finally, and as we were getting off the plane... my colleague Sushil pointed to the wheels of the plane exclaiming how worn out the wheels were...! We laughed and also thanked our stars and said a silent prayer to have our feet firmly on the ground...!

Our tour of the organic farm was next on the agenda after we had checked into the hotel.

We were keen to learn as much as we could, and the Marketing Manager from Pratibha Syntex was a wonderful guide. We started with a visit to the cotton fields that had a cow shed in the front, we watched how organic compost and pesticides were being made using farm waste including cow urine and cow dung. We were also told how the ancient technique from *Vedas-Agnihotra* was being used to increase crop

productivity. This was followed by a visit to the actual field where the cotton crops were in full bloom. We visited the main project office as well where the records for farmers are maintained and Vasudha project team helps guide interested farmers to convert regular farms to organic farms. It was very touching to get a warm reception at the project office and all three of us were welcomed with garlands... and posed for pictures after being garlanded, feeling very much like important politicians!

After the photo session, there was a treat of fruits grown organically as well! We were touched by the hospitality and the warmth of the Vasudha project team.

The next step was to understand how these beautiful cotton pods got converted into the garments that we so earnestly were waiting to see, so we visited the spinning/knitting unit followed by the production unit. It was truly an educative visit as we were shown every step of how the organic story unfolded itself from fibre to garment!

It was late evening when we finished and while we were having the sumptuous dinner along with our hosts, the conversation turned to the fact that we were very near to the famous temple of Mahakal at Ujjain which is one of the ancient Jyotirlingas and the discussion also moved to how beautiful their morning *Aarti* is. Both my colleagues were busy enjoying the dinner but the moment I heard this I was truly excited to hear this as my mom had often spoken about the famous Mahakal temple of Ujjain and having come so close to it, there was no way I was going to give up the opportunity of visiting the same.

Our flight back to Delhi was next morning and a decision had to be taken fast on this since it meant staying back one more day for this visit.

But the idea was being shot down by my colleagues due to the extremely early hours – the *Aarti* starts at around 4.30 a.m. and it meant we had to start at 2 a.m. from our hotel in Indore to drive down to Ujjain. Our hosts were kind enough to say that they could arrange this for us in fact their fabric manager and his wife also offered to join us on this little pilgrimage and this was now turning into an exciting plan. We quickly had a word with our boss and she gave the go ahead to spend one more

night in Indore... and after some initial reluctance my colleagues decided to come along too on this early morning pilgrimage *yaatra*... as one of them called it!

The divine pull had worked and very early the next morning we all set out on our journey to the Mahakal temple of Ujjain... making sure we reached there early enough to see the famous *Bhasam Aarti* which is performed first thing in the morning as the temple opens. The human ash it is said becomes holy, by merely touching the body of Mahakal, because Siva is considered *Nishkaam* or lust-less.

One of my colleagues knew a famous VIP in Indore and one phone call took care of getting VIP passes for us to gain an entry into the sanctum sanctorum to get a proper *darshan* of the *Aarti*.

It was also a last minute plan but everything was falling into place like a perfect jigsaw puzzle... the boss granting us permission to spend a day extra, our hosts from Pratibha Syntex offering to drive along with us the next morning... now the VIP passes also arranged... wow... I couldn't believe my luck and called up my mom in Delhi to give her the good news that her daughter was on a pilgrimage which she also would not have wanted to miss..!

As we reached Ujjain and the temple in the wee hours long before sunrise... a long queue was already there at the entrance just to gain entry inside the courtyard of the temple. The VIP passes worked like a magic and we zoomed in through a shorter route... right into the entry to the sanctum sanctorum. The priest led the men folk aside and they were offered a *dhoti* to change into and it was fun to see them come out of the changing room draped in a simple white *dhoti*!

Inside the temple, some devotees were already there and we also managed to... get a space to sit right across the area of the *Aarti* which was about to start. The *Aarti* was truly amazing... and one got carried away with the ambience of the whole atmosphere completely. The *darshan* was so good and smoothly accomplished that when I sit back and think about it today, I feel it was the call of the divine that pulled us there and somehow took care of any excuses that we may have thought of for not going...

COLUMN EDITOR



Hello Dear Readers,

As we step into the New Year, here's wishing all of you and your families and loved ones Seasons Greetings and lovely times ahead. May the New Year bring new hopes to the Garment Industry in India and great success to each one of you.

What better way to start the New Year than bring you a story connected with the Divine! Pratibha tells us in this story how the divine powers led to a situation fulfilling her desire to visit the famous Mahakal temple in Ujjain. Our business trips generally are so hectic that we end up just rushing from airports to hotels to factories and then back again to airport...! Life just goes on with one business trip after another...

In the middle of all this, it is inspiring to come across a story which goes a long way to show that where there is a will... there is a way, always! ...and of course when the divine is with us things just fall in place.

Best always,

LEELA KANUGA
leelak@apparelresources.com

The flight we took back was much better as we had to change our air carrier due to the extended trip time frame (we were all happy about this) and we were back with memories of a successful trip and divine blessings that would forever remain dear.

Incidentally, let me share one fun moment during our visit to the organic farm and visit to the *goshala*... where cows were kept and cow dung and urine was used for preparing manure for the cotton fields.

Our escort told us a funny story of how the CEO of a big corporate from America visited the place sometime before our visit, and once he saw cow dung and urine, etc. ...his sensibilities were shaken to the core, as he exclaimed:

"...Is this how organic fabric gets made... using this cow sh..!"

They never heard back from him as he left shell shocked!

The pull of divine, after all, was not working in his case...

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 editorial

 t r e n d

REFLECTIONS OF THE YEAR GONE BY...

In my editorial last year I had stressed upon the need to bring in operational transparency for growth. I still stand by the thought... as to achieve long-term growth and maintain profits it is important to analyze inefficiencies, identify bottlenecks, involve the managers and operators in the decision making process, and share information with each section. While it is too early to say whether the industry has moved in the direction, what they have done this year is well used this slow period to work on productivity improvement and better the operational methods to meet the reducing product prices on a global platform. Certainly a move in the right direction...

We had highlighted seven key trends of 2008, which would impact business in 2009. I am satisfied to note that all the trends that were analyzed have indeed had a bearing on this year. Who can deny that sustainability is the biggest trend and as predicted continued to be the buzz at all forums. The emphasis on sustainable growth is too big to ignore and it is our trend number one for this year too. The concept has penetrated into the ethos of the complete supply chain and everyone has to look at how he is doing business in a responsible manner to achieve three basic goals – social, environment and economic sustainability, with the three overlapping for deeper implications.

While environment sustainability is about carbon miles and energy saving devises..., the route of social sustainability is increasingly moving towards Trade Fair and accountability to workers in the supply chain. Today, the industry is more sensitized to such concerns. In fact, this year what has emerged as a trend is the rising voice for living wages. The debate is getting hotter and I don't think that it can be brushed away any more. But how to implement and who is going to be responsible for the cost is the critical question that needs an answer. In the meanwhile, the organic movement has become a way forward for many companies and India has finally emerged as the biggest producer of organic cotton, surpassing Turkey. It is a trend that more and more exporters from the country are adopting for growth.

The real challenge is to achieve environment and social sustainability in a way so as to be profitable for economic sustainability. For that it is important to look inwards as I mentioned earlier for better efficiencies and operational benchmarks. Also it is important that all the stakeholders in the supply chain create synergies for sustainable growth in a wholesome manner.

Trend number one last year was the financial gloom that was leading to many store closures in the US and also perpetuating companies to file for protection under Chapter 11. Indeed the trend continued this year and the US saw 434 store closures and more than 100 Chapter 11 files of which a few were also apparel-based stores/companies. Retailers in general cut down on their inventories and sourcing was done at the lowest possible price. The apparel supply chain remained vulnerable to the economic situation and as buying by consumers by and large remained low

key sourcing too took a beating. Orders were placed in 'least cost destinations' and value offerings were the demand of the season.

In this difficult economic scenario, the Indian industry was hit hard by the biggest insolvency of the year – that of Arcandor, the parent company of Karstadt Quelle, which not only shook the Indian industry, as many exporters are working for the retailer, but also raised many pertinent questions on how buying agencies operate in the country. The bankruptcy reminds us that the economy is still precarious and that going forward some more shockers may be waiting for us in 2010.

As predicted, China was tamed in 2008 and this year we witnessed shift in business from the dragon to low cost countries like Bangladesh, Vietnam and Cambodia and even to India because of the rising cost of production in the country. China started the year with an increase in the value of exports by 7.5%; however the volumes were down (-) 2.82% indicating that the cost of production had gone up and the quantities had suffered in the New Year. The trend remained more or less the same throughout the year and buyers are now keen to spread risk for more balanced sourcing.

As for fashion trends, we were bang on target and all the indicators from sheer fabrics to Grecian style dresses have indeed dominated product development in 2009 for S/S 2010. It is heartening to see that trends in fashion are India-friendly and that has given a positive push to business this season. Buyers are looking at value at least cost, and India is positioning itself to deliver.

And last but certainly not the least, optimism has been the most used and abused word this year... Everyone I talked to this year from buyers, exporters, technology providers to fair organizers, the common rejoinder is that buying is bound to get back on track as retailers have run out of inventories and they have no option but to buy, which means more business in the apparel supply cycle from 2010. For India, we are hopeful of business also because trends are India-friendly. S/S 2010 is about lightness and romance a theme which is an Indian favourite. With dresses still in demand, skirts have made a comeback and Jaipur is flourishing with tie&dye, pleating and layered skirts in demand. Floral prints mostly large in size are also in vogue. Preferred fabrics are chambray, voile, georgette, poplin and yarn dyed cotton. Another trend that is very Indian and is hot for 2010 is checks. Blouses with checks in different presentations are in production or have already been shipped out in large quantities.

Indeed, expectations are high of business picking up in 2010, but it is more a perception than a statement backed by facts... so we go into the New Year with optimism hoping for a better and more stable year.

DEEPAK MOHINDRA

Editor-in-Chief

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SUSTAINABILITY THE ONLY WAY FORWARD FOR PLAYERS IN THE APPAREL SUPPLY CHAIN...

In our last issue we had featured 'Sustainability' as trend number one for the year 2009 that will impact business in 2010 and beyond. A summary of the same is reproduced below along with the other key trends to emphasize the importance of sustainability. For details of companies and their initiatives, read *Apparel Online* issue December 16-31.

Most climate scientists agree that between now and 2050 greenhouse gas emissions, commonly referred to as carbon emissions, must be reduced by 80% (year-on-year by almost 4% from 2010) if we are to avoid serious adverse effects of climate change.

As the situation is getting deeper rooted by the day, it is not far when sustainability will be an integral part of sourcing strategy with exporters who have invested in sustainable processes and products emerging as the preferred supplier.

Retailer Initiatives

For retailers the route to be sustainable is to source from a sustainable supply chain and implement sustainable practices in retailing; for the garment supply chain it is the textile mills and processing units which are the major offenders. Brands that have committed to work within a sustainable framework include Nike, Levis, Inditex, Migros, M&S, GAP, Timberland, Target, H&M, Macy's, Tesco, to name a few and the list is increasing by the day. Issues like carbon credits, green stores, wind energy, organic cotton and fair trade are now an integral part of any compliance initiative. Retailers are also looking at options to buy from closer destinations or optimize transportation to reduce carbon footprints.

Involving the Consumer

Efforts are on by Green activist to impress upon all players in the supply chain that the carbon footprints along the complete chain must be reduced to have significant impact on the environment. This includes the consumer. Research by M&S and Otto Group, studying the lifecycle of cotton apparel clearly shows that nearly 80% of the garment

industries energy and greenhouse gas responsibility is actually in the hands of the consumer in the washing, drying and pressing stage. Efforts are now on to educate the consumers and encourage them to wash and dry clothes at lower temperatures.

Sustainability in Manufacturing

Brandix Lanka Limited, Marks & Spencer's 'Green' fashion supplier based in Sri Lanka, is a global benchmark on doing more with less by transforming its oldest 33-year-old apparel factory into a manufacturing eco-centre.

As retailers redefine their growth strategy based on sustainable concepts, manufacturing hubs like India begin to build in sustainable development. Work to become sustainable has begun with earnest. TASMA, an organization that represents Textile Spinning Mills in Tamil Nadu, is the pioneer in transporting the concept of Carbon Credit to India by bringing together a large number of textile and apparel companies to take advantage of windmills to generate energy, thereby cutting down on carbon dioxide [CO₂] emission by these units, directly and indirectly. Responding to issues of sustainability all major exporters in India have action plans in place. Recycling and reuse of water is being practiced. The main thrust areas in sustainability are – Eco-friendly products to customer, Reduction in heat, power saving, circulation of fresh air, better lighting and health environment for work force. Other ecological efforts like water treatment and recycling are already built into the working philosophy. Other efforts by exporters include increasing use of servo motors, finishing presses with better pipes so that temperatures are maintained and the use of bio mass to create electricity through captive plants.

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THE DEBATE ON LIVING WAGES GETTING HOTTER... AND LOUDER

The year 2009 saw the debate on living wages heating up with fresh thrust to the demands as NGOs put forward the thought in a practical manner defining the reasons why it is not happening and coming together to suggest what could be a 'living wage' common to all manufacturing destinations in Asia. Moving into 2010 the demand to move in the direction of living wages is only going to get louder.

The voice has become too big to brush aside and though organizations that are pushing for the same are practical enough to admit that it will be years before the fashion industry will have anything workable and tangible to offer as living wages..., what is immediately being asked for is an upward revision in wage rates at manufacturing destinations nearer to what could be a 'living wage'.

For exporters any revision upwards of the wage rates is a drain on their already thin margins and buyers seem to want better wages, but still prefer to work with low wage countries. The irony of the situation has been fodder for NGOs to keep pushing for living wages. A report by 'Clean Up Fashion', an initiative of UK Labour Behind the Label (LBL) highlights that the simple but appalling facts behind all the excuses for not implementing 'living wages' is that the manufacturing bases are in poor countries and that is the only way prices in today's economic times can be met... exploiting low wage production.

According to LBL, a framework based on how wages in different manufacturing centres could be revised does exist, called the wage ladder approach. This approach involves mapping the different wage levels at each manufacturing base according to parameters of – poverty lines, outcomes of collective bargaining agreements; floor wages, existing calculated figures of the same, and so on – The report also suggest that the framework could also be used as benchmarks on the way towards determining a living wage.

It is also important that deciding on a living wage should be a collaborative arrangement between buyer and supplier, and that means buyers must be prepared to do their bit. It is argued that if workers can produce more clothes in the same amount of time, the factory

can take on more business, earn more money, and pay workers more, while reducing their overtime. The buyers don't need to adjust the prices they pay to suppliers, and they may even get their orders turned around more quickly, so it's a win-win situation. Productivity improvements that correct this situation by making targets more realistic are welcome, but if instead targets are increased, the pressure may stay the same or even intensify. Indeed, a focus on productivity alone could turn so-called living wage projects into cost-cutting initiatives by the back door.

International NGOs argue that legal national minimum wages set for workers in the apparel industry fail to provide enough income for workers to maintain their families above national poverty levels. Poverty wages push many workers into debt, lead to malnutrition, cause health problems, and make workers and their families extremely vulnerable should they face sudden unemployment, health problems or disabilities. In fact, though the United Nations defines poverty as living on less than US \$ 2 a day, yet across Asia and Africa millions of workers in full-time employment earn less than this. In Bangladesh the legal minimum wage is only US \$ 25 – less than US \$ 1 a day. The United Nations defines this as absolute poverty.

On October 7, 2009 workers' rights groups in over a dozen countries throughout Asia, Europe and the Americas participated in the public launch of the Asia Floor Wage Campaign (AFWC). The campaign is demanding a common minimum living wage for garment workers across the Asian region, in order to stop the destructive race to the bottom on wages and labour standards – which is fueled in part by companies moving production between countries in the region in search of ever-cheaper labour costs.

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- **International NGOs** argue that legal national minimum wages set for workers in the apparel industry fail to provide enough income for workers to maintain their families above national poverty levels
- **The Asia Floor Wage** is based on “the income required for a single earner to support a family of four (2 adults and 2 children) by working a legal maximum working week (but no longer than 48 hours), excluding any payment for overtime or other bonuses/allowances”

The Asia Floor Wage (AFW) is based on “the income required for a single earner to support a family of four (2 adults and 2 children) by working a legal maximum working week (but no longer than 48 hours), excluding any payment for overtime or other bonuses/allowances.” It should provide enough income to pay for food and other essential living costs such as healthcare, housing, clothing, childcare, transportation, fuel, education, etc.

The AFW is expressed as a single figure that can be converted to local currencies using the World Bank’s ‘purchasing power parity’ (PPP) formula so that the floor wage would allow workers to purchase the same amount of goods and services in each garment-producing country in Asia. The AFW for 2009 was set at 475 PPP \$. The pressure to accept the ground-breaking wage benchmark AFW for garment workers has begun as Clean Clothes Campaign (CCC) activists are pressing international retail giants such as Carrefour, Tesco, Aldi and Lidl, as well as other major national-level retailers, to take up the AFW as living wage.

The proposed living wage for India works out to around Rs. 6000, for China it is 1200

Yuan (Rs. 8317.87) and in Bangladesh it is 8180 Taka which is equivalent to Rs. 5599.88.

There are two elements to the discussion – one who will pay the difference in wage rates which vary from 30% in China to nearly 80% in Bangladesh, India will also see an increase of wages by 49% and secondly – how to put a mechanism in place to ensure that the living wages actually go into the hands of the workers. While it is being suggested that the buyers contribute to the added cost, in an earlier issue of *Apparel Online*, it was mooted that a mechanism can be put in place provided there is the will to go ahead. A fund could be created with an independent body wherein buyers have to contribute a defined percentage of the total business done with the player to the fund. The fund must be managed by the worker union who has an account for each worker and like the PF the money is discharged into the accounts on a regular basis separate from the wages as defined by the governments of respective countries as minimum wages.

The debate has become so strong that it is becoming difficult to ignore and 2010 will only see the debate getting louder and bolder...



t r e n d

ORGANIC COTTON A GROWTH ENGINE FOR INDIAN GARMENT EXPORTERS

The year started with the news that India has overtaken Turkey as the largest producer of pesticide-free cotton. In 2009, the movement towards organic cotton was undeniable as increasing number of companies looked at the option. Also with many buyers initiating projects in the country centering on organic cotton it has become a major growth driver for the country..., a sustainable way to grow.

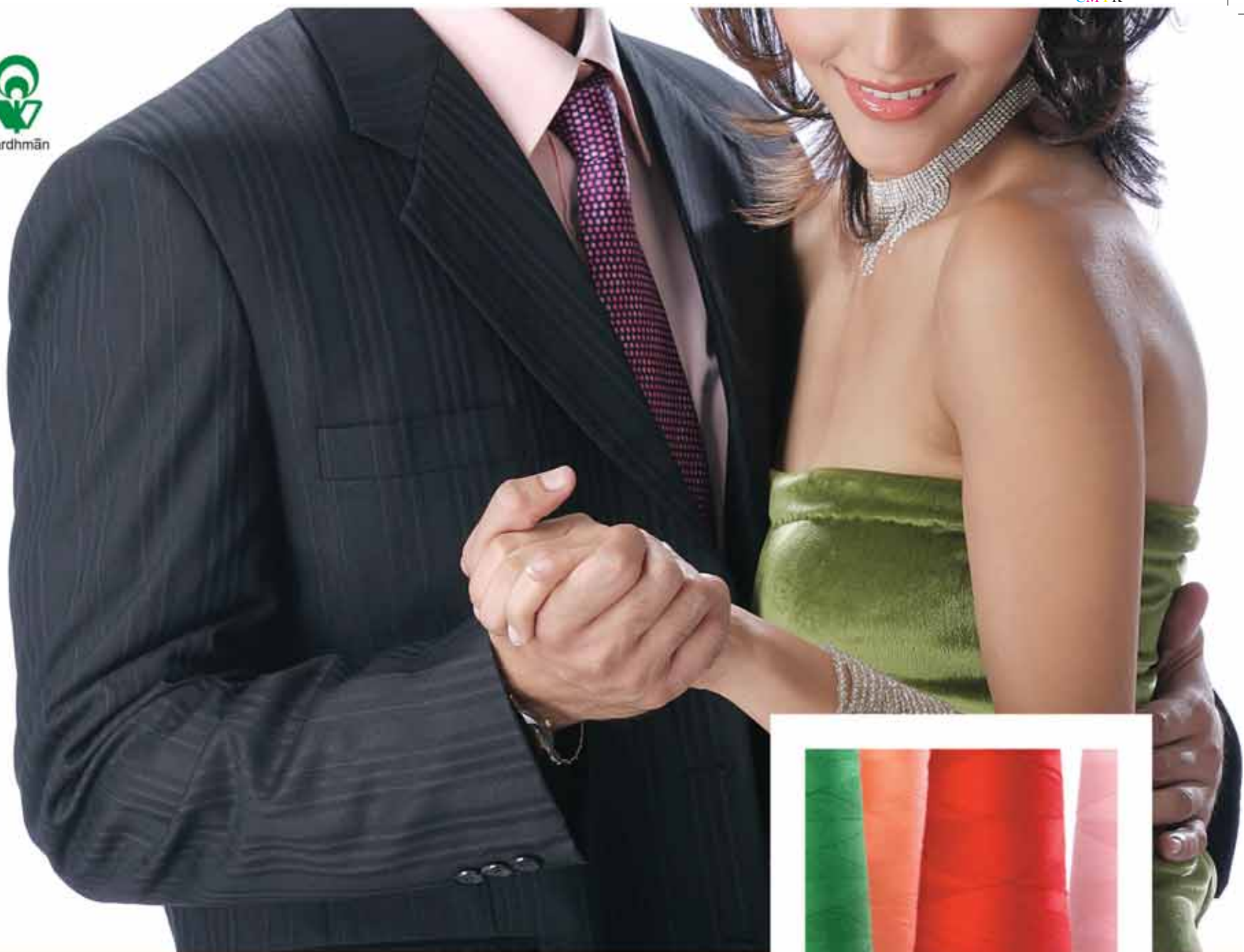
The reflection of the magnitude of penetration of organic cotton was seen at the IIGF in January, where products made from OC emerged as the hottest trend. In fact, even in a market that is so price-sensitive, products made from 100% organic materials found buyers despite being 15-25% more expensive to conventional products. The potential for growth in the market is obvious from the fact that retailers with the top three organic cotton programmes in the world, Walmart, C&A, and Nike, projected to represent approximately 50% of organic cotton retail demand in 2009 and

2010, have reaffirmed their plans to move forward with expansions in their organic cotton programmes. H&M too has announced plans to increase its organic cotton products stable by 50% this year, given consumers’ desire to buy sustainable products.

The top 10 organic cotton-using brands and retailers globally are Walmart (USA), C&A (Belgium), Nike (USA), H&M (UK), Zara (Spain), Anvil (USA), Coop (Switzerland), Pottery Barn (USA), Greensource (USA), and Hess Natur (Germany). Organic Exchange said that, despite the global retail outlook, most brands and retailers selling



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- **Organic Exchange** said that, despite the global retail outlook, most brands and retailers selling organic cotton products remained committed to their sustainability plans and upbeat about market growth, with plans to expand their product lines by 24% and 33% in 2009 and 2010, respectively.
- **Traceability** of the chain and the commitment of players in the chain to ensure traceability continue to raise question on the authenticity of the movement beyond just an 'environmentally' friendly product
- **Undaunted** by the bottlenecks, Indian manufacturers are taking the organic route as the 'real' benefits of working in organic cotton are too many to ignore,

organic cotton products remained committed to their sustainability plans and upbeat about market growth, with plans to expand their product lines by 24% and 33% in 2009 and 2010, respectively. This would result in an estimated \$ 4 billion market in 2009 and a \$ 5.3 billion market in 2010.

However, this sustainability route has its set of problems. The biggest being traceability, which means ensuring organic integrity goes beyond the initial certification at the farm level. Standards such as GOTS and OE 100 or OE Blended exist for the OC supply chain and it is the responsibility of each player to ensure that they are receiving correct and valid documents, and doing their part to track the fibre as it moves through their system.

In fact, traceability of the chain and the commitment of players in the chain to ensure traceability continue to raise question on the authenticity of the movement beyond just an 'environmentally' friendly product. Traceability implies that every retailer/consumer must be able to trace the life cycle of the product right down to the farmer level because of the certification transactions that happen at each stage which ensure that all parameters of integrity have been maintained.

Basically, Organic textiles are validated according to two

standards – GOTS and OE. While GOTS (Global Organic Textile Standards) emphasis the use of 95-100% organic fibre and ban all forms of harmful substances from spinning up to the finished product, OE (Organic Exchange Standards) allows blending in specific ratios. Each chain is tracked according to the parameters of the permitted limits of the chain.

Another hindrance to the growth of organic cotton is the cost involved. While everyone wants to be associated with the cause, not many want to bear the cost. On an average OC products have a 15% premium along the supply chain and though consumers, by and large appreciates the product they are not always happy to pay for it. The biggest hypocrites in the system are the big retailers who split the responsibility but not the cost. So what is happening is that the manufacturers are bearing the cost of a concept that was intended to be both a social and environment issue for the future of the Earth.

With increasing capacities in OC, prices are expected to come down. The World Congress on Organic Cotton "From Fashion to Sustainability", which was organized by the Swiss NGO Helvetas and the US-based Organic Exchange, both non-profit organizations trying to promote organic cotton production, recently

emphasized that as the supply of organic cotton has grown quicker than its demand, there is a current oversupply of organic cotton and at the beginning of 2009 stocks were at 42,000 tonnes. 17% to 30% of the 2008/2009 yield are not yet sold and form the first major oversupply in organic cotton. However, experts agreed that the growth trend in organic cotton is continuing and expected stocks to be cleared by late 2010.

Undaunted by the bottlenecks, Indian manufacturers are taking the organic route as the 'real' benefits of working in organic cotton are too many to ignore, starting from the farmer who besides not using any chemicals which are harmful will also see the expenses go down to nearly 90%, as producing cotton without chemicals there are hardly any expenses. It's just that in the beginning the yield was really less but in the end you don't have any expenses. For exporters it is a niche product to offer and with the benefit going right up to the ecology which is a macro issue and of concern to all it is the path to sustainability.

In India there are 397 GOTS certified companies of which 197 were certified in FY 2008-09 alone. While most organic farms are located in the Maharashtra, Madhya Pradesh, Gujarat and Andhra Pradesh

belt, it is the towns of Coimbatore and Tirupur in Tamil Nadu that boast of the maximum number of integrated players in organic cotton. Though the pioneers of the movement in India are Pratibha Syntex, Indore, who is involved with OC from the farming to finished product, this apparel manufacturing belt has come up very strongly in support of organic cotton manufacturing and a good number of factories are GOTS certified. Among the Mills, Super Spinning Mills and Armstrong Knitting Mills are major suppliers of organic cotton yarn to the export manufacturing industry while SCM garments and Cotton Blossom are spinning for their captive needs. Other major players include Eastman Exports, JJ Mills, Assissi Garments and NCC.

The north is also taking up the concept and SPL, Hotz International, COTEX, Ram Rajya, Orient Craft are some names that have entered the fray... Processing mills are also getting certifications to process OC and exporters are looking at the segment as a growth driver. Indeed organic cotton has become an integral component of the sustainability movement and Indian manufacturers are moving ahead quite briskly on this route.

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INDIAN TEXTILE MILLS AND APPAREL MANUFACTURERS TAKE THE TECHNICAL ROUTE FOR GROWTH

The textile industry in India is no longer shying away from innovations and as the market for technical textiles grows, more and more companies are getting on to the bandwagon for both fabric and finished products. While textile mills are looking at the segment as a growth area, apparel manufacturers are using the fabric to diversify their product offering into non-traditional products like ballistic clothing, workwear, sportswear, school uniforms, car seat covers, medical accessories to name a few products that have already created market awareness.

The Indian market for Technical Textiles is worth around Rs. 37,565 crore and is growing at a pace of 11-12%. The growth in the segment is fed by the fact that the current per capita consumption in India is quite low at 0.3 kg as against 7-10 kg in the developed world. Even the share of Technical Textiles in India at 5% does not compare well with the corresponding figure of 30% as reported in the developed world. However, industry opinion is that combined growth of various sectors within Technical Textiles will bring about an overall growth of the segment in India, namely Geotech, Buildtech, Meditech, Mobitech, Agrotech, Protech, Packtech, Sportech and Clothtech.

Though the movement towards Technical Textiles has been slowly gaining ground, it is in 2009 that the Government gave a push to the segment with the launching of Technology Mission on Technical Textiles in the XI Five Year Plan. India being a developing economy the infrastructural growth in next 10 years would be exponential and with that both Geotech and Protech will get a huge boost. Further, awareness level towards the safety of workers is increasing as most of the construction companies are multinationals and they have brought in the safety culture to India, which again is impetus for growth of Protech. Another high growth segment is Meditech as medical care enters a new phase of modernization.

In a world market for technical textiles estimated at around 21 million tonnes with a value of US \$ 127 billion by 2010, the drivers for future growth are expected to be Asian countries like China and India. The industry in India has grown 275% during 2001-02 to 2007-08 and today there are about 1500 Technical Textiles units in the country which includes MNCs, large scale units, SSI and even cottage units.

Alok Industries has established its position in Technical Textiles with offerings like fire retardant fabrics, water repellent and soil release fabrics, high visibility fabrics and 'heavy weight' industrial fabrics for workwear, school uniforms, automotive and defence requirements. The company has also entered the workwear market propelled by its strength in Technical Textiles. Jaya Shree Textiles, a division of the Aditya Birla Group is specializing in fire retardant fabric supplying to both domestic industry and garment exporters in the workwear market. Another upfront player Shri Lakshmi Cotsyn is supplying technical textiles for institutional market for uniform and ballistic wear, besides manufacturing uniforms from its garmenting unit. Other mills supplying to the workwear market include JCT, Arvind and Vardhman. In Protech the only Indian company which has capability to weave the Kevlar fabric is Indian Armour, which specializes in ballistic clothing both for the national and international market.

According to the industry sources, Reliance Industries is aiming to grab 50% market share of Technical Textiles in India within three years. The company has become a member of the US-based Association of the Non-woven Fabrics Industry (INDA). Coimbatore-based Shakti Group with an annual turnover of over Rs 2,000 crore, of which textiles contributed Rs. 100 crore, is looking at diversifying into non-woven textile manufacturing and marketing in India. A non-textile entrant for automotive textile manufacturing is tyre manufacturer SRF Ltd., which is planning to invest Rs. 250 crore in its automotive textile project.

Ahlstrom, a global leader in high performance fibre-based materials, has signed a Memorandum of Understanding with Mundra Special Economic Zone (SEZ) in Gujarat, to



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purchase a land area of 5 hectares in the Textile and Apparel Park to start its production of medical textiles. Chandigarh-based Surya Textech, a conventional cotton yarn manufacturer with a turnover of Rs. 30 crore ventured into technical textile just a year back with an investment of Rs. 10 crore. The company is manufacturing Spunbond fabric which meets the need of diverse range of products like medical, hygienic and industrial market application.

Ginni Nonwovens, a division of Gini Filaments is manufacturing Spunlace non woven fabrics in a very state-of-the art facility in Panoli, Gujarat. Total investment in this project was Rs. 130 crore with a capacity of 12,000 tonnes/annum. Mumbai-based Kusumgar Corporates is dedicated to manufacturing fabrics (woven and non woven) for ballistic, industrial and sportswear along with geo-textiles. Rana Polycot Limited, Chandigarh has started manufacturing PCM (Phase Change Material) based technical textiles which is very good for sportswear and defence uniforms as it regulates the temperature according to the weather/ environment. This will give a push to the garment exporters working in this segment.

Joint Ventures

Many textile mills have gone in for foreign collaboration as the technology is still limited in India. A very significant tie-up is between Italian Giant Klopman catering the global need of imagewear, workwear and protectivewear since 40 years and S Kumars Group. These fabrics are extensively being used by workwear manufacturers like Amrit exports, Mallcom, Acknit, Texport Syndicate, etc.

Alps Industries has gone into collaboration with a Japanese textile company Suminoe Textile

Co. Ltd., manufacturer of automotive fabrics and interior material to manufacture automotive fabrics. Alps is also looking at geo-textile-coated fabric manufacturing as well. UK-based Technical Absorbents Ltd. (TAL), manufacturer of super absorbent fibres has a tie up with BCH to be represented in India. The core business of TAL owned by Bluestar Fibres Ltd. is the manufacturer of Oasis Super Absorbent Fibre (SAF).

Another JV company is Wellproof Technologies, a joint venture between UK-based Proofings Coated Textiles, manufacturer of rubber coated textiles and Mumbai-based Vako Seals Ltd. The JV company is manufacturing coated textiles for defence, fire protection, industrial and medical industry.

Ahmedabad-based CTM Technical Textiles has recently ventured into technical textiles. The company has gone in for a marketing tie-up with HKO Group, Germany. "HKO specializes in coated/laminated fabrics ideal for ballistic and industrial garments. The company gives flame-retardant PUR coating, UV resistance, soil and oil repellent and many more finishes.

The potential for Indian textile mills to expand capacity is obvious from the fact that India is importing Rs. 4,000 crore worth of technical textile today. The potential growth in the segment is huge with the domestic market for technical textiles projected to grow to Rs. 66,414 crore by 2012 of which 93% is expected to be consumed domestically and 7% for exports. Further, the scope to expand product offering to international buyers has also increased as the technical textile capacity in India increases making it easier for garment manufacturers to move beyond the obvious and the next few years will definitely see a growth in product categories that require Technical Textiles.



BANKRUPTCY BROUGHT INDUSTRY ON ONE PLATFORM TO REGULATE BUYERS

Though the financial slowdown has taken a toll on many companies, some were hit worst than others. As in 2008, this year too saw a number of store closures and bankruptcy filings both in the US and EU. But one case that shook the industry was the insolvency of Arcandor in June.

The financial crises at Arcandor, the parent company of Karstadt Quelle saw more than Rs. 150 crore worth of payments to Indian exporters held up in the mess. On 29th July, Quelle La Source (France) also filed for insolvency deepening the crisis.

Though earlier in 2008 also retailers had gone bankrupt, the impact of the same was not as far reaching, changing the way exporters want to do business and raising questions on the functioning of buying offices in India.

For an industry that has had hard times for the last one year bankruptcy filings are added

problems. In fact, ever since the global economic recession began in second half of 2008, many retailers like Steve and Barry's, Goody's along with Mervyns have faced a financial blow. Pacific Sunwear, Lane Bryant, Fashion Bug and Catherines closed over 150 under-performing outlets. Foot Locker wound up 140 stores and Ann Taylor closed nearly 120 outlets. Others like Eddie Bauer, Cache, Talbots, J Jill, GAP Inc, Goodbye Levitz, Home Depot, Macy's, Pep Boys, JCPenney, Lowe and Office Depot as well scaled down operations due to falling sales. Arcandor filed for insolvency after requesting and being

denied emergency funds of around 640 million euros (approximately \$ 930 million US). After Arcandor made its shocking announcement, vendors who were supplying made-ups, apparels and other textile items through Li & Fung for decades felt cheated, as they were not informed about either Arcandor's financial position or about why the payments were getting delayed since January '09.

The event brought the industry on to a common platform and has created awareness to change the way business is conducted through the buying agencies. Exporters are now looking at contracts more carefully. The importance of a risk management team has also been enhanced. While the ECGC provides insurance to exporters for shipments made, there is increasing demand for more companies that can check the credentials of buyers even before orders are placed. Exporters are also demanding greater involvement of AEPC to keep a check on the functioning of buying houses.

In fact, there is a growing demand that buying agencies should also apply for licenses and should be given permit to work as an agent from the Government of India so as to keep a tight control on their functioning. Further, the license should be given on the basis of certain defined criteria's that

test the credibility of the agency and a specific code of conduct for buying houses operating in India also needs to be laid out. The voice for greater transparency in the supply chain is growing stronger.

While the Arcandor insolvency has alerted the industry to the pitfalls of blindly doing business with buyers, the second major bankruptcy filing of lender CIT Group can have repercussions on many small and medium exporters in 2010. The CIT Group filed for Chapter 11 protection in an attempt to restructure its debt while trying to keep badly needed loans flowing to thousands of mid-sized and small businesses. The Chapter 11 filing is one of the biggest in US corporate history, following Lehman Brothers, Washington Mutual, WorldCom and General Motors. CIT's bankruptcy filing shows \$ 71 billion in finance and leasing assets against total debt of \$ 64.9 billion.

Experts believe that Indian garment exporters could get severely impacted in the coming months as thousands of small and medium-sized businesses in the United States face financial difficulties and could go out of business because of the filing. Nearly 80% of Indian exporters service small US vendors. Further, credit terms may worsen and thereby impact Indian exporters.

CIT is the largest factoring firm to the apparel sector, responsible for an estimated 60% of factoring in the US apparel and footwear industry. Giants such as Liz Claiborne Inc., one of the reported clients of CIT, may not be so badly hit with other financing options in banks. But the smaller companies will get deeply impacted, especially due to lack of option for financing. As per Standard & Poor's estimate, CIT lent about four billion dollars to US apparel manufacturers and retailers last year. With 71 billion dollars in assets, the company serves 2,000 vendors that supply merchandise to 300,000 stores, according to the US National Retail Federation.

Going into 2010, the industry is hoping for better business environment, but the lessons of experiences in 2009 have sharpened their wits to face buyers on equal terms and investigate the financial strength of a company before entering any agreement... it was interesting that when Charles Voegele opened a buying office in India recently, the first questioned asked was how financial strong they are... indeed the industry has changed for the better and 2008 will see exporters conducting business on more transparent bases.

- **Though** earlier in 2008 also retailers had gone bankrupt, the impact of the same was not as far reaching, changing the way exporters want to do business and raising questions on the functioning of buying offices in India
- **Exporters** are now looking at contracts more carefully. The importance of a risk management team has also been enhanced. While the ECGC provides insurance to exporters for shipments made, there is increasing demand for more companies that can check the credentials of buyers even before orders are placed



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Optimism – Hopes and Aspirations 2010...

Though 2009 has overall been a dull year for most players in the industry, the undercurrent of optimism has run strong... the first indications that things could now go right for India came from the buyers in early June when most of them felt that trends for 2010 were certainly India-friendly. Optimism was also reflected in the way the industry perceives how business will move in 2010. Talking to buyers, exporters, technology providers, fair organizers and other industry informed persons, the common rejoinder is that buying is back on track as retailers have run out of inventories and they have no option but to buy, which means more business in the apparel supply cycle.

With most retailers admitting that inventories are at the lowest levels the industry is optimistic of better business in the coming year and few exporters even commented that the undercurrent is of 50% growth in the S/S 2010 season. Not only the retailers but consumers too seem to have got tired of lying low, overall US retail sales in November spiked by 1.3% after a healthy 1.1% gain in October. November's increase was well above the consensus estimates breaking above even the most optimistic estimate. Further, US consumers' sentiment for November rose to 73.4 from 67.4, against expectation of 68.5 appeared to argue for a self-sustaining economic recovery. In the meanwhile the stock market, investors in the US have bid up retailing stocks in anticipation of an economic recovery. Apparel retailers are up about 70% this year, department stores have gained about 63%, and general merchandise retailers have risen 38% growth...

I feel that 2010 will be a great year for the industry. We are going to expand in the entire value chain, right from spinning, weaving to garmenting. Workwear garmenting will take a major leap. In home textiles our focus would be on our latest product category terry towels. We are planning to increase our capacity in wider-width which will take the production capacity to 68 million metre from 47.05 million metres per annum. In our international retailing business we are looking at opening 100 more retail outlets of 'Store Twenty One' in 2010 with a projected turnover of over 200 million pounds.

Dilip Jiwrajka, MD,
Alok Industries, Mumbai

We are very optimistic about 2010. As a company dedicated to organic cotton products, we are looking at increasing our organic yarn capacity by 50%. Now the era is of ethical and fair trade and we are already towards it.

Sumanth Ramamurthi,
MD, Super Spinning
Mills Ltd., Tirupur

In my opinion, the difficult period is disappearing with the end of 2009. The growth signs emerging out of US economy as well as stability in Europe and UK is giving renewed confidence to the importers and retailers in these countries. We have seen a great upsurge in business in the last 8 weeks.

I feel this will continue for the year 2010.

Sudhir Dhingra, CMD, Orient Craft Ltd., Gurgaon

We are going into the New Year quite positively and it will continue. I am very hopeful that S/S 2010 is going to be better than 2009. Overall there are on-going enquires. Spinning mills are doing very well now but we don't know whether the recession is at the start of its tail-end or almost on a verge of finishing. We have gone for extensive expansions in last two years and now we are looking at growing our apparel business by 40% by the end of 2010. We are going to be very aggressive on our manufacturing and continue to do what we do well.

Shreyaskar
Chaudhary, MD,
Pratibha Syntex, Indore

I am sure 2010 will be much, much better than 2009. Our orders are 40% better than the last season so a very lucrative S/S 2010 is ahead.

Rajesh Kumar, Head
Hot Source, Gurgaon

US has recovered a bit. The worst seems to be over. We are currently not expanding capacities but moving up the value chain, which is still in the volume moderate market. We are going into forward integration not backward by opening retail stores in India for market diversity and also as India story is still intact. Our brand chemistry has been very well received and we are growing it aggressively.

Sunil Jhangiani, MD,
Esjay International, Mumbai



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OPTIMISM2010

Optimism – Hopes and Aspirations 2010...

We are looking forward for a good year ahead keeping in mind various business plans according to the present scenario and demand of the customers. We have already ordered different and new machinery for completing and enhancing the production and fulfil the ever increasing demand of our buyers and exporters. We have been receiving very good response from the buyers regarding the quality we are supplying.

Mukesh Jain, Director,
Jain Narrow Fabrics,
New Delhi

Let's be optimistic about 2010. Seeing the trends, I foresee S/S good for us however the increase in cotton prices makes the industry skeptical. If the textile ministry doesn't take some steps to bring down the cotton prices, I dread that business would slow down. The ministry should immediately stop the cotton exports from India so that the positivism which started brewing from 2009 onwards would disappear very soon.

Mohan Anand, GM,
Walther & Walther Int'l,
Bangalore

Our planning for year 2010 is to achieve at least 20-25% growth. We want to achieve this not by expanding our capacity but proper utilization of our lean period from May to October. Our capacities are utilized hardly, just 40% during this period. We are trying to fill up this by tapping new markets in South America and expanding our base in Japan which has emerged as good market for us in recent years.

Another area we are working on is Lean Manufacturing. We are implementing this under a Sri Lankan consultant to improve our productivity and reduction of wastages in the process. This will make us more cost-competitive to achieve higher growth.

On socio, economic and environmental front, we are aggressively pursuing organic garments and recently got certified as GOTS-OE manufacturer.

We are also working on to reduce carbon footprints inside our factories. For this purpose we are hiring a specialized agency to carry out intensive audit of our facility to prepare a road map for energy saving. We also gave similar project to two NIFT final year graduates as part of their study. They will be working from January 2010 on this. Water recycle project is also being considered to save water in our laundry. In terms of recession, US market is responding slowly and we are seeing a small growth.

All these steps will not only help us in getting desired growth, improving the bottom line but also make us a socially responsible manufacturer.

Animesh Saxena,
MD, Neetee Clothing,
Gurgaon

Our Strategy for 2010 is to expand our wings to reach out to our esteemed clients by providing service to their door step. We are constantly working towards providing new services and consolidating our businesses across industries. As a responsible company we are planning to take some new Green Initiatives to support environmental testing and establish as trusted partners in progress by enhancing our customers competitive advantage in the industry.

Intertek looks upon moving in 2010 from strength to strength across various industries.

Dilip Gianchandani, Regional Director, Intertek India, Gurgaon

We are looking at a very bright 2010 in terms of our growth and business. We are going to open our branch offices in Delhi, Mumbai and Bangalore in this year and we are targeting turnover of around US \$ 25 million from our India office this year.

Girish Ramkrishnan,
Country Manager, Market
Fit India, Tirupur

I guess 2010 would be better than 2009 which for us was a year of consolidation. This year we are looking at adding knits in our product basket. Any investments from our side would be on latest value addition machines as it very quickly justifies its cost and give fast return on investments.

Mukesh Kansal, Chairman,
CTA Apparels, Noida

We are looking forward to enter 2010 with full zest. We are anticipating that we will see growth prospects of 80-100% if the economy is recovering for better. We are also planning to tap nearly six new markets in this year to widen the span of our presence. We look forward to open up a centre in an overseas market to offer localized service to manufacturers of that nation. The place is yet to be decided but soon the project will take shape.

Khyati V Bhide, Director,
Unisource Ventures, Mumbai

We foresee growth only by the end of 2010, as the world economy still has not really recovered from the fiscal downturn and it will take another one year to fully recover from its impact. The end-product manufacturers are still suffering as the frequency and number of orders has slowed which in turn has affected us as well.

Pawan Jain, CEO, RTC
Zippers, New Delhi

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PROJECTIONS FOR 2009-10 AT RS 20,744.52 CR

With the year 2009 behind us, it is time to re-assess performances and project future growth... After the positive feedback for our debut effort to track 100 upfront apparel exporters last year we are compiling the second edition of the AO TOP 100. The listing is more comprehensive than last year with most companies willingly coming forward to participate. However, some exporters still prefer to remain out of the list for reasons best known to them. The effort is targeted to bring more transparency into the system and give a corporate structure to the apparel export industry.

It cannot be overlooked that the industry is a labour-intensive sector and generates employment to many unskilled workers coming from small villages around the country. It is well documented that every annual turnover of Rs. 1 cr. requires a minimum of 65 - 70 people in a factory add to it the employment in the support industry such as fabric mills, dyers to buttons, zippers and other accessories suppliers to logistic and warehouse, the list is endless and offers huge employment opportunities... No doubt the importance of boasting this industry is underplayed and with our 'AO TOP 100' listing, we aim to get more recognition for players in the industry while focusing on core issues that form the structure of the industry like compliance certifications, man-woman ratio and product categories in different manufacturing hubs.

This year we have also added the year of establishment to the details in the listing, which emphasize on the commitment of companies to the industry. Just by adding another year to the industry, the exporter demonstrates a high degree of loyalty to the business reflecting the company's, and hence the management's commitment to the business. Other new sections are compliance certifications that exporters are holding and the man-woman ratio in factories across the country.

Before analyzing this year's performance it is critical to recap the performance of the previous year as a base to move forward..., so below are some interesting references.

RECAP OF MAJOR FINDINGS IN 2009...

- The 100 listed companies generated a total turnover of Rs. 17,132 cr. in FY 2007-08 and the collected growth of the group was 11% and employing around 11.88 lakh workers.
- As per *Apparel Online* estimation, total garment export from the country is around \$ 12 billion and hence these 100 listed exporters represented around 33% of total garment exports from the country.
- As for the major centres represented on the AO 100 Listing – Delhi-NCR with 37 companies on the List registered the highest collective turnover of Rs. 5,500 cr., followed by Tirupur (22 companies) with Rs. 3,834 cr. and then Mumbai (13 companies) with Rs. 2,057 cr. and Chennai (11 companies) with Rs. 1,780 cr. turnover, respectively.
- From Financial Year 2006-07 to FY 2007-08 a large majority of 70% saw growth with only 25 companies witnessing a downfall in business and 5 remaining at the same level.
- While the biggest downfalls in FY 2008-09 were from Delhi-NCR region, the biggest gains too were from the centre. Meenu Creations, headed by Anil Peshawari saw 138% in 2008-09 Financial; it was followed by Paragon Apparels with 100% growth headed by Roshan Baid. Viraj Exports, led by Shiv Bhargav, saw 77% growth and CTA, Noida under Mukesh Kansal witnessed 74% growth.
- Collective projections for FY 2008-09 was at Rs. 17,326 crore.

AO TOP 100

S. No.	Name of the Company	Location	Year of Estb.	Concerned Person	Products	Turnover FY 07-08	Turnover FY 08-09 (projected)	Turnover FY 08-09	Turnover FY 09-10 (projected)	Compliance Certifications (All)	Diversity Ratio (Men:Women)
1	House of Pearl Fashions Ltd	Gurgaon	N/A	Deepak Seth Chairman	Multi Products	314	N/A	1,448	2,000	WRAP, SA8000, ISO	N/A
2	Gokaldas Exports Ltd.	Bangalore	1978	Rajendra J Hinduja, MD	Woven & Knits	1,071	1,203	1,093	1,200	ISO 2001-2008, Bureau Veritas Certification	33:67
3	Shahi Exports (Mkt. Sources)	Faridabad	1974	Harish Ahuja MD	Men, Women and Kids Garments	750	900	910	935	WRAP, Buyer compliant, ISO 9000:2001, SA 8000:2001	70:30
4	Orient Craft Ltd.	Gurgaon	1978	Sudhir Dhingra CMD	Woven, Knits, Denim and Home Furnishing	618	740	802	850	We have compliance clearance and CTPAT from all our vendors	N/A
5	Eastman Exports	Tirupur	1983	N Chandran CEO	Knits for Men, Women and Kids	605	783	793	1,025	ISO 9001, ISO 14001, GOTS-Organic certification, Okotex 100, SA 8000, WRAP	55:45
6	KPR Mill Limited	Tirupur	1984	KP Ramaswami Chairman	Knits	574	666	751	900	ISO 9001:2000, ISO 14001:2004, SA 8000:2001, Certified by International Association for research & testing, Certified as a One Star Export House, GOTS, OEKO - TEX, Ethical Trade Initiatives, WRAP	85:15
7	Gokaldas Images	Bangalore	1979	Jagadish N Hinduja, MD	Multi products	N/A	N/A	550	590	GSP ETI and WRAP	15:85
8	Bombay Rayon Fashions	Mumbai	1992	Aman & Prashant Agarwal, Directors	Tops in Woven & Knits	395	540	860	1,200	Buyer compliant	20:80
9	Richa Group	N. Delhi	1977	Virender Uppal MD	Fashion Garments	440	455	482	522	ICRA (Under Audit) and from All buyers	75:25
10	Mandhana Industries	Mumbai	1984	Manish Mandhana, MD	Fashion Garments	330	430	463	620	ISO 9000, SA 8000, Flo cert, Oeko-tex, Control Union OE-100 Certification, GOTS & Fair Trade certification	40:60
11	Texport Overseas Pvt. Ltd.	Bangalore	1995	Samir & Rajat Goenka, Directors	Woven Bottoms/ Jackets/Ladies Tops	N/A	N/A	397	397	SA 8000	25:75
12	SPL Industries	Faridabad	1994	Vijay Jindal, MD	Knit Garments	324	369	369	305	All Major Buyers	50:50
13	K Mohan & Co. (Exports) Pvt Ltd	Bangalore	1973	Raju M Mahtaney, CEO	Readymade Garments-Woven	305	N/A	353	400	Fair Trade Cotton Certified	40:60
14	Texport Industries Pvt. Ltd.	Mumbai	1978	Sashi Sekhar Director	Woven & Knits Apparels	337	309	287	350	ISO 9001:2000, Abercrombie & Fitch, American Eagle, Armani, H & M, Tommy Hilfiger, Robert Graham, Diesel, Reebok/ Adidas, GAP, Target, Primark, Wrangler/ Lee, WRAP, Walmart	50:50
15	SCM Garments Pvt Ltd	Tirupur	1989	P.P.K. Paramasivam MD	Tee shirts, Tank tops, Sweatshirts	200	278	285	365	ISO 9001-2000, ISO 14000, WRAP, SA 8000, GOTS, Organic Exchange, OEKOtex-Class 1&2	60:40
16	Zodiac Clothing Ltd	Mumbai	N/A	Salim Noorani, MD	Knits & Woven	N/A	283	283	N/A	N/A	N/A
17	S P Apparels Limited	Tirupur	1989	P. Sundarajan MD	Knits	323	356	274	325	Trading House Certification, ISO 14001:2004, FLO, WRAP, M&S Premier, Accreditation Scheme, ISO 9001: 2008, OEKO Tex, NABL, Certification of chemical & mechanical testing, Datacolor Accreditation recognised by M&S, Tesco & Wal-Mart	25:75
18	Best Corporation	Tirupur	1967	R.Rajkumar, MD	Knitted Garments	363	N/A	250	300	WRAP	33:67
19	Celebrity Fashions Limited	Chennai	1988	V.Rajgopal CMD	Readymade Garments- Woven	332	231	250	280	Buyer compliant	20:80
20	Venus Garments - Group	Ludhiana	1966	Anil Kumar Jain MD	Knitted Garments	N/A	N/A	230	275	Global security verification, C-TPAT, Oeko-Tex, GOTS Processing House- ISO 9001:2000 Certified	95:05
21	Sonal Garments	Mumbai		Pravin Agarwal Director	Knits & Woven	245	230	230	N/A	Buyer compliant	N/A
22	Modelama Exports Ltd	Gurgaon	1979	Lalit Gulati, Sanjay Gulati & Gagan Gulati Directors	Outerwea, Jackets, Skirts/Shorts, Pants, Shirts, Blouses, Sleepwear, Activewear etc.	150	150	225	250	Gap Inc, Macy's, USA & Compliance certifications by third party Audit Companies viz. SGS, Bureau Veritas & STR. All the 12 units are compliant one.	80:20

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(ALL FIGURES IN RS. CRORE)

S. No.	Name of the Company	Location	Year of Estb.	Concerned Person	Products	Turnover FY 07-08	Turnover FY 08-09 (projected)	Turnover FY 08-09	Turnover FY 09-10 (projected)	Compliance Certifications (All)	Diversity Ratio (Men:Women)
23	Poppys Knitwear (P) Ltd	Tirupur	1973	A. Sakthivel MD	Knitted Readymade Garments	218	220	225	250	ISO-9001-2000, WRAP, SA-8000, Gots, OE, Oekotex, Sedex	60:40
24	Orient Fashions	New Delhi	1972 (2002 prop)	Amit Sethi, Director	Fashion Garments	180	195	214	200	ISO 9001, SA 8000, Buyer compliance audits by Bureau Veritas / ITS / SGS / GAP Inc./ Target Corp / J.C.Penny	84:16
25	Creative Garments	Mumbai	1975	Vijay Agarwal MD	Fashion Garments	340	375	210	260	Ethical trade initiative/sedex member ethical trade audit	85:15
26	Kitex Garments Ltd	Kerala	1992	Sabu M. Jacob MD	Knitted & Woven Garments	176	167	203	260	WRAP, C-TPAT	60:40
27	Madura Garments	Bangalore	N/A	S.Vishwanathan, CEO	Knits & Woven	180	200	200		N/A	N/A
28	Pratibha Syntex P.Ltd.	Indore	2001	Shreyaskar Chaudhary, MD	Knitted Casual & Undergarments	157	213	196	202	SA 8000, ISO 14000, OHSAS 18000, ISO 9001, GOTS, OE, Fair Trade, NOP, NPOP, GSV, WRAP, OEKO TEX, American Association of textile chemists & colonists	90:10
29	Network Clothing Company	Tirupur	1993	Akhilesh Anand CEO	Knits	173	190	193	221	WRAP, SA 8000, Oeko Tex, Organic Exchange, GOTS for organic cotton, FLO for Fair Trade cotton.	40:60
30	A.I. Enterprises Pvt Ltd	Chennai	1985	HE Haji Iqbal, MD	Knits & Woven	185	195	187	225	ETI (SEDEX), SA 8000	30:70
31	Radnik Exports	N. Delhi	1973	Vinod Kapur MD	Fashion Garments	160	170	170	205	ISO 9001:2008 (across board), ISO 14001:2004, SA 8000: 2001, OHSAS, 18001:2007, OE 100, GOTS, H&M, M&S, SEDEX	60:40
32	Go Go International	Bangalore	1991	Rajeev Goenka Director	Knits & Woven	130	156	157	173	WRAP, BSCI,GOTS	35:65
33	Intimate Fashions (India) Pvt. Ltd	Guduvancheri, Tamil Nadu	1997	John Chiramel CEO	Bras and Briefs	240	240	151	146	ISO - 9001-2000, ISO 14001-2004	11:89
34	Orient Clothing Co. Pvt. Ltd	Gurgaon	1997	Ravi Dhingra, MD	Woven, Knits	150	150	150	160	Gap, Monsoon, Mother Care, American Eagle, American Living, Guess, George, J Crew, Next, Urban Outfitter	70:30
35	Meenu Creation	Noida		Anil Peshawari, MD	Woven	63	150	150	N/A	N/A	N/A
36	Matrix Clothing Pvt Ltd	Gurgaon	1977	Gautam Nair MD	Readymade Garments	112	137	149	165	BSCI , FLO, Compliant uner law of land	80:20
37	Gupta Exim (India) Pvt Ltd	Faridabad	1990	Sandeep Gupta MD	Knitted Garments120 /Fabrics	120	150	148	181	ISO 14001, GOTS, SUPIMA, OE (Organic Exchange), GAP, OEKO /TEXSTANDARD-100	95:05
38	Alok Industries	Mumbai	2000	Dipil Jiwrajka MD	Multi products	100	134	140	188	Organic Cotton, OEKO-TEX, ETI-Report on SEDEX (SMETA), BSCI, Global Security verifications, EU Flower, SWAN, Fair Trade, SA 8000	65:35
39	Mallcom India	Kolkata	N/A	A K Mall, Chairman	Protective Clothing	390	405	136	150	N/A	N/A
40	B L International	Noida	1989	Deepak Agarwal MD	Fashion Garments	140	150	133	184	ISO Group, Inditex, Bestseller, Next, Top Shop, Kiabi, AB Lindex, Mango	60:40
41	Tube knit Fashions Limited	Tirupur	1996	P. Parthasarathi MD	Knitted Garments	150	N/A	125	150	SA 8000, ISO 9001-2000	N/A
42	RBR Garments	Tirupur	1997	Senthil Kumar MD	Knitwear-Ladies, Mens' & Kids	N/A	N/A	125	145	ISO 9001, ISO 2008, SA 8000, WRAP	60:40
43	Meridian Apparels	Chennai	1989	Vinod Sarogi MD	Knits	120	140	123	140	Wrap / Okeotex / BSCI Audited / Sedex Listed / GOTS	60:40
44	Cotton Blossom (India) Pvt. Ltd.	Tirupur	1997	Philomena, Milton Ambrose John, Joseph Antony John, Directors	Hoisery Garments	96	115	123	150	ISO 9001:2000, ISO 14001:2004, OHSAS 18001:2007, SA 8000:2000, OEKO-TEX 100, Organic Exchange (OE), Global Organic Textile Standard (GOTS)	65:35

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(ALL FIGURES IN RS. CRORE)

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ANALYSIS 2010...

Before moving to the analysis, it is important to note that there are many changes in the listing as new players have been added and some of those in the last listing do not feature on the list. In fact there are 16 new names on the listing... So this year's analysis is not a replica of the same companies' featured last year. Though FY 2007-08 is the basis of growth, some companies have not shared the data so the percentages may be slightly varied but the same has clearly been mentioned in each case.

It is a real challenge to put together the AO TOP 100 listing and we bring you some key findings that reflect how the industry is moving...

■ Collective turnover sees 9% growth from last year's figures

The collective turnover of the AO TOP 100 exporters for the FY 2008-09 is an impressive Rs 18,673.89 cr., higher than projected last year. The growth in turnover is 9% higher than realized turnover in FY 2008-09 and nearly 8% higher than projected figures. This is indeed a very encouraging finding as it clearly indicates that the top end of the export community is doing well and despite all the hurdles that kept the industry on a low, leaders who have either put systems in place or have created niche in product categories continue to grow. In fact, undeterred by the global retail downturn the collective projections for FY 2009-10 stand at Rs. 20,744.52 cr. for these top exporters a growth of around 11%. And this is only for 94 companies, as six companies preferred to stay silent on projections.

■ Gains in all segments in FY 2008-09

With 49 companies having turnover above Rs. 100 cr., the combined turnover of the group is Rs. 15,762.90 cr. This is over 84% of the total combined turnover of the Top 100. Further as *Apparel Online* estimations put the total apparel export figure of India at around around Rs. 55,000 cr., in that context the exporters on the AO TOP 100 listing with turnovers above Rs. 100 cr. account for more than 28% of exports from this country. The TOP 100 listed companies overall account for 34% of total exports from the country.

While there are 32 exporters between the turnover of Rs. 99 cr. and Rs. 50 cr. with total earnings of Rs. 2,203.76 cr, the number of players at the tail end of the listing with turnover between Rs. 49 cr. and Rs. 27 cr. with a total turnover of Rs. 707.23 cr. is 19. Each segment has shown growth and projections too are higher. This augurs well for the industry and speaks of the confidence of the top players to grow even in difficult economic times. It may be noted that these are the very players who have put processes in place and are benchmark for efficiencies. On the other hand, many of the medium players are working in niche areas and have the strength of product development behind them.

■ Delhi-NCR again the biggest manufacturing centre

The AO TOP 100 listing indicates that the Delhi-NCR region is the most represented region with 31 players making it to the list. Gurgaon has 10 companies, Noida 12 companies, Delhi

6 companies and Faridabad 5 companies. The collective turnover of this region as represented in the listing is of Rs. 5,855.63 cr. With this tip of the iceberg, it is estimated that the Delhi-NCR region must be having a collective turnover of around Rs.15,000 cr. Second most represented region is Tirupur with 19 companies having a collective turnover of Rs. 2,710.76 cr. It is estimated that the total turnover of the region should be around 12,000 cr.

Mumbai is represented in the AO TOP 100 list by 11 companies with a collective turnover of Rs. 2,758.69 cr. Rough estimations put the business in the region at Rs. 4,000 cr. Bangalore is the centre for big players and the 8 companies on the list account for a turnover of Rs. 2,954.26 cr. Taking the structure of the industry in Bangalore in mind, the turnover from the city is estimated at around Rs. 5,000 cr. Chennai has 6 players on the list with combined turnover of Rs. 719.54 cr. and it is estimated that the region is accounting for around Rs. 2,000 cr. worth of business to the total export turnover of the country.

It is a bit difficult to segregate turnovers by regions as many companies have headquarters in Mumbai but operations in Bangalore or even Tirupur... Similarly, some Delhi companies have operations in Bangalore and Chennai. However, the estimates have been based on where the companies have headquarters. The remaining players on the listing come from diverse centres like Ludhiana, Indore, Hyderabad, Kolkata and Jaipur.

■ 86% Companies expect growth in FY 2009-10

Of all the companies listed, only 8 projected either a downfall in their turnovers for FY 2009-10 or same levels of growth and 6 companies did not give their projections. The rest 86 companies indicated growth for the running financial.

■ 50% Companies see growth in FY 2008-09 over the last financial year

It is encouraging to note that 50% of companies saw growth with only 20 companies witnessing a downfall in business and 16 are new companies, so there FY 2007-08 figures are not available, the remaining are at the same levels. No doubt, FY 2008-09 was a difficult year, since companies lost when compared in US currency, but it also had some positives as the rupee depreciated

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AO TOP 100

S. No.	Name of the Company	Location	Year of Estb.	Concerned Person	Products	Turnover FY 07-08	Turnover FY 08-09 (projected)	Turnover FY 08-09	Turnover FY 09-10 (projected)	Compliance Certifications (All)	Diversity Ratio (Men:Women)
45	Nahar Spinning Mills	Ludhiana	1980	S.P. Jain, MD	Knits	917 (Group)	1,028 (Group)	121	150	IS/ISO 9001-2000, AEPC Regd	90:10
46	Centwin Hosiery Mill Pvt. Ltd.	Tirupur	1978	P.Palaniswamy MD	Embroidery, Dyeing, Knitted, Woven, Printing	81	96	120	150	PVH, Wal-Mart, OVC	50:50
47	V & S International	Gurgaon	1992	C. P Gauba MD	Knits/Woven	N/A	N/A	116	116	ISO 9001, third party audit by Intertek & SGS	85:15
48	Indian Designs	Bangalore	1993	Naseer Humayun, MD	Woven	88	100	108	120	H&M, Columbia, Gap, Esprit, Fatface	20:80
49	Rolex Hosiery Pvt. Ltd.	Gurgaon & N.Delhi	1965	Vikas Chander MD	Knits Garments	120	105	105	120	N/A	90:10
50	Indus Intex Pvt Ltd	Bangalore	2008	Virendra Agarwal MD	Woven Shirts	N/A	N/A	96	125	CTPAT,SGS, Li&Fung, VF & Levis	15:85
51	CTA Apparels Pvt. Ltd.	Noida	1993	Dr. Mukesh Kansal, MD	Woven & Knits	54	95	94	120	ISO 9001-2008, Okeotex certification (cotton dyed), Okeotex part-II (in process), GOTS, OE Certification, BSCI Apporved, SA 800:2008 (in process)	70:30
52	Jyoti Apparels Group	Delhi/ Gurgaon	1976	HKL Magu, Rakesh Magu Directors	Children & Woven Knitted	76	90	94	105	BSCI - STR, SMETA, SEDEX - BV, ITS	70:30
53	Esjay International	Mumbai	1981	Sunil Jhangiani MD	Knitted & Woven, Ladieswear	61	65	90	110	WRAP, SA 8000, ISO 9001	30:70
54	Crystal Clothing Company	Tirupur	N/A	V.Vijaysekar/ V.Shriprakash Directors	Knits	90	90	90	N/A	N/A	N/A
55	Pee Empro Exports	Delhi, Faridabd	1982	Tony Uppal, MD	Ladies and Kids Woven Garments	75	79	85	110	BSCI, ISO-9000	N/A
56	Paramount Products	N.Delhi	N/A	Surinder Mahajan, MD	Fashion Garments	70	75	84	95	BSCI , SEDEX , SGS	70:30
57	Nancy Krafts Group	N.Delhi	1973	Narinder Pal Singh (Pali Singh) MD	High Fashion Ladies Woven & Knitted Garments	41	45	83	96	N/A	95:05
58	Bhandari Hosiery Exports Ltd	Ludhiana	1993	Naresh Bhandari MD	Knits	75	79	80	85	WRAP, BSCI	60:40
59	Prime Tex	Tirupur	1989	R.Govintharaaju, MD	Hooded Zip Thru Jacket, Joggers, T-Shirt, Pyjama Sets, Bodysuit, Sleepsuit & all kinds of Kids wear.	52	69	76	85	SEDEX, ITS, SGS, TUV SUD, MTL. Factory approved for Mothercare, Mini Boden, NEXT, Paul smith, M & S, Walt Disney, Reebok, Hasbro,Bhs & Woolwoth.	65:35
60	Allied Group	N.Delhi	1967	Hari Kapoor, MD	Fashion Garments	70	65	76	83	Charming Shops, Walmart, JONES, TESCO, NEXT,SEDEX, EVANS	40:60
61	Cotex	Mumbai	1971	Dilip Trivedi, MD	T-Shirts	63	48	72	75	GOTS, Organic Exchange, OEKO TEX, RINA, Buyer certifications	N/A
62	Eveline International	Ludhiana	1976	Rakesh Dumra, MD	Knits (T-shirt, Polo Shirt, Sweat Shirt,Top)	52	64	70	85	SMETA, BSCI & GSV	90:10
63	Shirt Company (India) Limited	Mumbai	1984	Shivanand B. Shetty, MD	RMG	80	90	69	67	SA 8000:2001, ISO 9001:2008	35:65
64	Jupiter Knitting Company	Tirupur	1957	S.Krishnaraj, MD	Knitted Garments	63	67	68	60	ISO, SA8000, WRAP, GOTS & Oeko Tex	50:50
65	Shree Bharat International	Noida	1988	Sanjay Aggarwal MD	Cotton knitted Garments & Sweaters	N/A	N/A	67	67	Li & Fung	80:20
66	Rainbow Fab Art	Noida	N/A	Amit Oberoi, MD	Fashion Garments	67	70	66	75	N/A	N/A
67	Gupta & Company	Chennai	1984	Ashish Gupta, Director	Fashion Garment of Ladies and Children	70	65	65	70	Buyer compliant	20:80
68	Linea Fashions (India)	Chennai	2002	C Perkinian, GM	Knits Underwear	64	60	63	72	WRAP, Organic certification	10:90
69	Acknit Knitting	Kolkata	N/A	D.K Saraf, MD	Protective Clothing	43	65	62	70	Buyer and product compliant	N/A
70	Viraj Exports Pvt. Ltd.	Noida	1984	Shiv Bhargava MD	Ladies Fashion (Woven/ Knits)	30	54	61	80	ISO9001-2000, BSCI, SA8000, ETI	80:20
71	Beauty Fashions	Tirupur	1991	D.Duraisamy, D.Subramani Directors	Knits	50	70	60	77	OEKO TEX, WRAP, SA8000, SEDEX, TESCO & DISNEY Approved & Certified factory	75:25

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(ALL FIGURES IN RS. CRORE)

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considerably giving an edge to Indian exporters that was previously missing. Benefits also accrued as some orders were redirected to India from China because of their currency appreciation, wage rate hike as well as increasing recognition of dismal record of social and environmental compliances.

From a region wise perspective, a majority of companies in Chennai saw a downfall in their turnover in FY 2008-09 *vis-à-vis* the last Financial Year with only 2 companies out of 6 seeing growth. In Bangalore, 5 out of 8 companies saw growth with the remaining 3 companies being new on the list. Tirupur has seen overall growth with 11 out of 19 companies registering growth.

Dividing the Delhi-NCR region into centres, all 6 companies in New Delhi registered growth in the FY 2008-09 over the FY 2007-08. In Gurgaon out of the 10 companies on the list 6 saw growth, one registered decline, one company remained at the same level and two companies are new to the listing. From Faridabad, while 3 companies saw growth, 2 companies are new on the listing. From Noida out of the total 12 companies, 6 saw growth, 3 a decline and for the other 3 the data was not shared.

■ 43% Companies show consistent growth year-on-year

AO has always advocated that companies who have a sound strategy in place will continue to see growth irrespective of global scenario, though the growth may be at a modest pace... this is clearly reflected from the fact that 43 companies on our listing have shown consistent growth over the FY 2007-08 to FY 2008-09 and then projected growth for FY 2008-09 over 2009-10. While 4 companies in Bangalore have shown consistent growth, 10 companies have registered consistent growth year-on-year in Tirupur and only 2 companies in Chennai have witnessed consecutive growth for two years. In the Delhi-NCR region, 5 companies in New Delhi have seen consistent growth, while two companies in Faridabad, six companies in Gurgaon and five companies in Noida could show consistent year-on-year growth.

The reason that Tirupur continues to show good results is the fact that buyers are looking at India for value added knits and Tirupur is fetching higher UVR's than Bangladesh and China. Bangalore being a centre for big players, the growth ratio is higher in the region.

Only 3 companies in the entire listing saw a downtrend over both the two periods under review, which clearly reflects that the industry is managed by some very serious players. There are 17 players who though saw negative growth in the FY 2008-09 over FY 2007-08, are projecting growth for the running FY 2009-10. This is indeed a good sign that companies have worked on strategies to bring the factories back to the growth path. However, there are three companies that have projected a down fall after registering growth – SPL Industries, Orient Fashions and Jupiter Knitting – but there is still some time to go before the actual picture emerges and there could be some changes..., we will watch out for them next year.

■ Major growth companies

The top five companies to show exceptional growth from FY 2007-08 to FY 2008-09 are House of Pearl with 360.90% growth, Nancy Kraft with 103% growth, Viraj Exports with 101.92%

growth, Imperial Garments with 80% growth, and SNQS and CTA Apparels with 73% growth each. While Viraj Exports and CTA Apparels featured in our top growth analysis last year also, the other four companies are new contenders. In the case of House of Pearl, the huge growth is attributed to the fact that the company has witnessed huge global growth with operations outside India adding to its performance. All other companies have operations in India and their performance is accordingly impressive.

■ Product categories

Almost the complete ranges of product categories that are made in the country are represented on the list. From basic T-shirts to protective garments find a place in the listed companies. Many of the companies are working with organic cotton as 19 companies are GOTS certified. While companies in Tirupur are more into knits, those in Bangalore, Chennai and Mumbai are more inclined to woven garments. The Delhi-NCR region is catering to a diverse range including knits and woven. Most of the high fashion producers are from this region. Ludhiana which has 6 players on the listing with a total turnover of Rs. 567 cr. is completely into knitted garments both in wool and cotton blends.

■ AO TOP 100 – Compliant to buyer standards

It is very heartening to find that all companies on the list are compliant to various standards from WRAP, ETI, SEDEX to buyer specific compliances. 30 companies have wrap certifications, 38 are ISO compliant and 52 are SA standard certified. Three companies – Orient Craft (Gurgaon), Venus Garments (Ludhiana) and Kitex Garments (Kerala) – have gone in for CTPAT for security compliance.

It is also interesting to note that many of the companies are multi-certified and that certifications for environment compliances is also on the rise with 14 companies OEKO Tex certified. FLO cert and Fair trade also find mention in the list of certifications. For an industry that is increasingly going the sustainable way, the fact that players are serious about meeting compliance standards is positive for growth. Buyers are finding more and more companies working within international parameters.

■ Man-Woman ratio

Studying the Man-Woman ratio of the AO TOP 100 companies no real pattern has emerged and though more women are working in factories in the south, the factories in the north are also now improving the ratio with increasing representation coming from women.

■ Non participants

Like last year some big names did not come forth with their turnovers like LT Karle, Kaytee Exports, Roverco Apparels, Shakhti Knittings, SM Apparels to name a few for reasons best known to them. The effort is to bring more transparency into the system and make it corporate...with each passing year we hope to tighten the list to be as authentic and true to the industry as possible.

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A top class product backed by a strong marketing strategy is the mantra for success at Wendler Einlagen, the Germany-based interlining major with leadership market share in the international shirt segment. Having consolidated its position in the two Western markets of the US and Europe, the company is now eyeing Asia for growth as the shirt market in the industrialized economies begin to stagnate. "It is in countries like China, India, Indonesia, Vietnam that market evolutions are happening and as these countries increasingly take to Western wear, the opportunities of growing is immense," says **Dr. Gerhart Wendler, President, Wendler Einlagen.**

Structured on four strategic pillars of quality, availability, customer support and innovation, Wendler interlinings is a name to reckon with in the upper market segment of shirts, both classic and casual. "No one asks

us about our quality, it is a basic expectation and we have stringent systems in place to assure that the quality never falters, what people do ask is our support to customers and new innovations in line with international trends," says Dr. Wendler. He goes on to add that availability in a short lead time is all the more critical these days as companies do not want to stock inventories and order at short notice.

Though the current slowdown in the global economy has impacted most businesses, sales of interlining for shirts have not really been affected, as the import of shirts by the two major markets of around 1 billion shirts per year was only marginally down by 5% in 2009, not significant enough to impact business. Even for Welco Agencies, the partners of Wendler in India, the brunt of the slowdown has been negligible. "While business on a general basis was down 35-40%, we saw a dip of not more than 15% in our area of operation," avers **Mahesh Pahwa, MD, Welco Agencies.**

One of the reasons for Wendler's consistent performance, even in time of slowdown is that the company has created a niche market positioning, concentrating on interlining for shirts while most other interlining companies are handling a whole gamut of interlining. As a specialist in shirts the company has nomination from all major shirt brands and in the case where approvals are required, manufacturers are also giving preference to Wendler as the quality and deliveries are assured. "It is a strategic decision to service a niche market and we have created a competitive edge in the segment," says Dr. Wendler.

R & D Essential Growth Parameter

As a specialist player a lot of attention is paid to R&D so as to constantly improve upon the technology of the product while also keeping pace with new industry demands. While 60% of R&D is buyer driven to meet new requirements, 40% is born from the desire to improve the durability, comfort and appeal of the product. In this quest, Wendler has perhaps the widest range of interlining for shirt collars than any other company in the world. "We are always striving to strike the right balance between improvement and innovation," says Dr. Wendler.

Among the latest innovations from the company is the V-line series, wherein special treatment has been provided for low shrinkage in classic shirts that are mostly

Quality, Customer Support, Innovation & Availability 4 Strategic Pillars of Wendler



Dr. Gerhart Wendler, President, Wendler Einlagen; Mahesh Pahwa, MD, Welco Agencies; and Hagen Buerge, MD, Wendler Interlining HK

worn with a necktie. This is particularly important for comfort. Another innovative range is the K-line series of bulky interlinings for voluminous collars to give a handmade look in high-end shirts. "Many brands prefer the voluminous heavy collar to the flat collar for a trendy look," avers Dr. Wendler.

In touch with global trend forecast providers and shirt manufacturers, Wendler is also bringing out two trend directions in a year that highlight what fashion in Italy, UK, the US and other upfront countries are talking about. Though most shirt manufacturers working in the international market are not really using these trends as they produce what is asked for by their buyers, local brands find the inputs very useful. "Many Indian companies are using the directions for their developments and this has become a strong marketing edge in the local market," says **Hagen Buerger, MD, Wendler Interlining HK**, who also looks after the Indian market. These trends not only give indication of collar styles but also the fabric, colour and cut of classic and casual shirts from fashion centres around the world.

Technical Support

Indeed support to customers is at the core of operations at Wendler and despite being an exclusive interlining company; Wendler also trains and provides technical assistance for fusing. Right from selection of the most appropriate machine to the maintenance of the equipment to the application of interlining on different fabrics, the involvement is 100%. "Today there is much more to selling than just giving a good product and most companies look forward to our pre-production test samples with instructions on how to achieve optimal results in fusing," says Dr. Wendler.

The critical three parameters of fusing – pressure, temperature and timing are all addressed even before production starts. Adds Pahwa, "We have such a wide range of offerings in interlining that to select the right one for different fabrics is difficult, our labs support the customers so there is no mistake or delay because of wrong selection of interlining."

Innovative Approach to Partnership

With a vision to expand and penetrate the market in Asian countries, Wendler has initiated a special project with its partners for inventory management so as to monitor which item is fast moving and in which



"No one asks us about our quality, it is a basic expectation and we have stringent systems in place to assure that the quality never falters..."

Dr. Gerhart Wendler
President, Wendler Einlagen

colour, directly from the partner's warehouse. "This is a very upfront approach to sales and is possible only with the support of cooperative and transparent partners like Welco Agencies," says Dr. Wendler. The involvement is so deep that sitting in Germany it is possible to know which item is running low on stocks and which manufacturer bought what product on which date from Welco. "The relation is so strong that I don't feel as if we are working with an outsider," says Pahwa.

Based on a foundation of trust, Pahwa is quick to add that the constant support from Wendler to his feedbacks as Product development has been the reason for Wendler's success in India. "When we started operations we asked the company to give us an economy line to start with as India is a very price-sensitive market and they complied with our request. Today we are selling a complete range including the high-end collection, purely on brand value," concludes Pahwa.

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Bhayani Plastic Enters Joint Venture with Visconti, USA to Manufacture Hangers in India

It is a proud moment for Bhayani Plastic (BP) as it enters a technical tie-up with Visconti, a division of Polyoak Packaging to manufacture hangers in India. The most interesting aspect of the JV is that the hangers produced in India will be co-branded – carrying the name of both Visconti and Bhayani Plastic. According to **Atul Bhayani, MD, BP**, this is the first time that an Indian hanger company has been promoted by a foreign collaborator in plastic hangers for the use of logo to be fixed on all hangers. “This is indeed an achievement as stores are not willing to incorporate any other logo,” says Bhayani. The JV will be officially launched at a grand reception in New Delhi on 12th of January 2010.

With a current capacity of 75,000 pieces per day, hangers at BP are produced under strict quality and compliant conditions dedicated to both environmental and labour-friendly parameters. The new tie-up will add a competitive edge to the company as they are being made under VICS certifications, which implies that the hangers are for high-end products. Bhayani India has a long standing commitment to service and timely delivery. Earlier only imported hangers had VICS certification and the new JV will be the fifth VICS certified hangers to be available in India.

Armed with many patents for design excellence, BP is very excited with the tie-up as Visconti is already a leading name in the US market working

“Co-branding is indeed an achievement as stores own the design of hangers and are not willing to incorporate any other logo”

ATUL BHAYANI, MD,
BHAYANI PLASTIC

with 18 retail programs for reputed retailers like Beall’s Department Stores, Academy Sportswear, Belk’s, Bon-Ton, Boscov’s, Dick’s Sporting Goods, Dillard’s, Elder-Beerman, Federated/Macy’s, JCPenney (National Brands), Kohl’s (Childrens and Intimates), Nordstrom, Peebles, SAKS Inc., Sears, Stage Stores and Steinmart to name a few.

The synergy of an international expertise and the dedication of an Indian company will be a unique combination. BP carries forward the commitment of its founders since 1960, servicing the Garment Industry for over 25 years. Bhayani Plastic’s sustained customer relationship is achieved with the support of its dedicated team and responsiveness to the changing needs of the market. In the globalized era, Bhayani Plastic has focused itself on the three important C’s – Customers, Creativity and Competitiveness. In the meanwhile, the company has received 100% EOU status from the Government of India, whereby providing international prices to the domestic export garment market.

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Accessories Manufacturers Back on Track as Sales Grow

The situation improves for the accessories manufacturers as the market starts to recover from recession, the buyers surface back and good orders come in.

As recession and downturn in the textile industry take a backseat with the beginning of 2010, the accessories manufacturers are all positive about the growth prospects they had foreseen. The manufacturers are seeing progress in sales and the number of orders they receive. "The recession is certainly over as consumers have started spending again. Moreover we've seen higher usage of crystals and stones in 2009 and as the situation improves, we expect better results in 2010," says **Sanjay Sharma, Country Manager, CRYSTALLIZED – Swarovski Elements**.

The manufacturers are seeing greater demand from the domestic market unlike the overseas market which has sought to neutralize the sales compared to where they stood last year. **Suresh Bhansali, Managing Partner, Conqueror Buttons** says, "We have seen an improvement of 20-25% in sales over the last three months, but that is mostly driven by the domestic demand rather than exports. Exports are still suffering; the domestic demand has given it a cushioning effect."

For a few, who have recently entered the Indian market the crunch was less impacting; rather they saw an upward movement in their growth chart. **Gourav Sarin, Sales Manager, Eswegee Interlining**, avers, "We are just three years old in the Indian market and still in our nascent stage, so we didn't really see any downturn in our business. Moreover, we are, presently, adding on new customers and have experienced a growth of 30% since last year. For us it's just the beginning and we are seeing dramatic improvement."

The accessories this season is all about big when it comes to



Large stones and chunky accessories are in demand

stones and buttons while for interlining the demand is more for light weight garments.

Buttons manufacturer, **Rajat Vora of Fashion Accessories India Pvt. Ltd.** unveils, "Presently, lot of metal trims are in fashion. Like Metal Buckle, Metal Plate, Die Casted Studs, Die Casting Buttons, etc. Overall fashion in industry is changing for more and more metal trims on garments. We are getting orders mainly from Killer Jeans, Kuttons, Numero Uno, Ruff, Bare, DJNC, etc." Further-more, **Suresh Bhansali** adds, "Formal buttons, sheet or pearl buttons, fabric buttons are in demand. A new concept of recycled buttons has also been introduced which is being accepted widely. The buyers that have started placing order with us are Fila, Adidas, Decathlon, Gokaldas, Arrow, US Polo, Park Avenue, Cherokee, Zapp to name some."

For sequins and beads, **Sanjay Sharma** says, "Fancy large stones are in demand. The asymmetrical cuts and tear drop shape are most liked by the customers. People are more interested in designs which are traditional and large. Our buyers are mostly from the

fashion world, in terms of brands we've got Levis, UCB and Titan watches".

Sukesh Kumar, MD for South & South East Asia, Kufner International reveals, "Interlining for products like men's and ladies light wear is in demand. Our buyers list includes Josa Banks, Peerless Clothing and other profitable retailers of USA." While in terms of thread, **Akshay Kumar, National Manager, Madeira India Pvt. Ltd.** says, "The product which gives value addition along some niche edge to the garment had shown some demand, like metallic or wool acrylic threads."

The manufacturers are now, after the period of slowdown, experiencing a rise in the size of orders they are receiving. According to **Shakti Jain, Director, Great Eastern Impex**, "There has been a 5% growth in terms of size of order, which will help us meet targets set for this year." While, on the other hand, **Gourav Sarin** says, "Even though our competitors have seen a dip in business this year, the size of orders for us has certainly increased."

The New Year is likely to bring a new ray of hope for the manufacturers as sales are anticipated to grow.

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IAM Mumbai Offers New Specialized Courses in Fashion Design with International Universities

Institute of Apparel Management, Mumbai (under the aegis of AEPC) has offered new specialized courses like Fashion Design for Media and Fashion Retail Management. The ceremony which was inaugurated by Shatrughan Sinha (MP), the courses will begin from the academic year 2010 onwards for which IAM, Mumbai, has received encouraging response.

The two PG programmes in Fashion Design & Management & Apparel Marketing Merchandising will have 15 seats each whereas the UG programme in Fashion & Lifestyle Design will have 25

seats all together. These courses have added a new dimension to domestic brands and retail that are looking for better professional understanding of their product and brand.

According to Premal Udani, Chairman, IAM, the institution has joined hands with leading international educational bodies including Edexcel UK, RMIT Australia, Wolverhampton UK, George Brown College & Ontario College of Arts & Design, Toronto Canada. In 2009, IAM signed a path breaking MOU with IGNOU to develop a separate Fashion and Design Management Centre to evolve a contemporary programme in



The IAM and AEPC team with the dignitaries at the launch

Fashion Design Management starting from April 2010.

The event saw some prominent faces like Dr. Darlie Koshy (DG, IAM & ATDC), Rakesh Vaid (Chairman – AEPC),

Ashok Rajani (Vice Chairman – AEPC), Priya Dutt (MP), Indu Shahani (Sheriff of Mumbai), Prof. Vijay Kapur (Advisor to V-C, IGNOU) and various leading exporters.

Knitwear Technology Mission Launched in Tirupur

The much-awaited Knitwear Technology Mission (KTM) in Tirupur has been inaugurated by the Apparel Export Promotion Council Chairman Rakesh Vaid. KTM will focus on engaging newer and greener technology in manufacture, increasing the designing capability of knitwear sector aimed at higher value addition and also to bring round the year business.

KTM would provide various support services to knitwear sector including research, training, design development, testing & certification, knowledge service and investor facilitation services on non-profit basis. Also, various training programmes and specialized courses will be offered to student community to become industry-ready professionals.

A brainchild of AEPC, the KTM headquarters will help the knitwear manufacturers to diversify more into the production of apparels made of man-made fibres and thereby give value-addition to their product portfolio.

Padma Shri and KTM Chairman A Sakthivel, who is also the President of FIEO said that the Mission would be a driving force for the growth of knitwear in the years to come since it would give adequate importance to product development using newer fabrics as well as impart technical training to the businessmen in the sector.



Newly constructed building for AEPC-Knitwear Technology Mission in Tirupur

“A Centre of Excellence named Institute of Apparel Management (IAM) for Human Resource Development would be set up at the KTM building shortly,” said Vaid. “Our aim is to create more skilled young work force needed for growth of Apparel Industry,” he added.

To promote production of value-added textile products, AEPC signed a Memorandum of Understanding (MoU) with Pailung Machinery Mill Ltd., Taiwan for providing latest machines and technology support.

Meanwhile, the AEPC has sought grant from the Central Government to further strengthen the activities of KTM by seeking grant of Rs. 20.48 crore to improve its infrastructure, said AEPC Secretary-General V.K. Singh.

Rs 25,000-cr FDI likely for Textile Sector in 5 Years: Maran

Union Textiles Minister Dayanidhi Maran said that the Indian textile sector is likely to get foreign direct investment to the tune of Rs. 25,000 crore over the next five years. Briefing reporters after inaugurating the National Handloom Expo at Quaid-e-Millath College for Women in Chennai, he said the Government has initiated steps in this regard.

In a bid to promote handlooms and improving the livelihood of weavers, the Ministry of Textiles has been celebrating Handloom Week since December 21, he said. Handloom expos are being organized in 22 places across the country, with each exhibition expecting revenue of Rs. 3-4 crore.

On the progress of the proposed integrated textile park at Kancheepuram, the Minister said, “We are waiting for dates from Chief Minister M. Karunanidhi to lay the foundation,” he added. The expo would showcase silk handloom products from South India and West Bengal.



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India's Exports to the US during Jan.-Oct. '09 Sees Quantities Increase 4% Even as Value of Exports Decline (-) 7.63%

Despite the overall feeling of optimism, the reflection of the same is yet to be seen in actual import data into the US. For the review period Jan.-Oct. '09, imports by the US was down (-) 13.25% in value and (-) 7.63% in volumes. The average UVR is also down from \$ 4.40 to \$ 4.13. Segment wise the UVR moved from \$ 5.25 last year to \$ 5.07 under the review period this year for cotton items. This is indeed bad news for the industry as cotton prices in India rise consistently making it difficult for exporters to meet offered prices at the time of order placement. On one hand the prices that buyers are willing to pay is on the decline and on the other hand fabric prices for cotton is sky rocketing.

Interestingly, not even one product category saw growth in the imports to the US during the review period. For individual countries also the downside was greater than the gains. Except for China which saw some growth (1.42%) no other country under review was able to increase exports to the US. With two months left, exporters are hoping that the holiday season will bring in some respite.

Apparel exports to the US in Jan.-Oct. '09 analysis

India

- Total exports from India during this period saw growth of 4.01% in quantity terms though value wise the country registered a decline in exports of (-) 7.32%.

TOTAL GLOBAL APPAREL IMPORTS BY THE US

Type of Apparel	Jan.-Oct. 2008		Jan.-Oct. 2009		% change	
	Qty	Value	Qty	Value	Qty	Value
Cotton	11,704.11	61,425.27	10,545.95	53,476.01	-9.90	-12.94
Wool	248.00	3,715.91	206.00	2,706.36	-16.94	-27.17
MMF	7,058.49	18,542.18	6,913.72	16,777.37	-2.05	-9.52
Silk & Veg	402.80	1,785.14	265.60	1,185.90	-34.06	-33.57
Total	19413.41	85468.50	17931.27	74145.64	-7.63	-13.25

Qty & Value in mn M² & US \$

- India's UVR stood at \$ 3.16 for the period, down from \$ 3.54 last year.
- During the period, India registered maximum growth in legwear with 39.81% increase followed by positive exports in babies' wear (25.80%), ladies skirts (15.47%) and ladies dresses (13.62%).
- Trousers registered the highest negative decline of (-) 23.26%. Besides, exports of men's shirts, sweater and T-shirt also saw decline of (-) 20.14%, 17.89% and 11.91%, respectively.

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China

- The country saw growth of 1.42% in value and 8.47% in quantities. The UVR stood at \$ 2.74.
- Categories that did well include T-shirts with 25.80% growth, undergarments with 20.30% increase, and trousers with 20.65% rise in exports.
- Most other categories could only register negative growth. Suits/Ensembles (-) 24.30%, ladies skirts (-) 23.46%, nightwear (-) 20.94%, jackets & blazers (-) 19.21%, ladies blouses (-) 11.55% and babies wear (-) 10.14%.

Bangladesh

- The country registered marginal decline of (-) 0.13% growth in value; quantities too have seen a downward trend of (-) 2.86% in volumes during the review period. UVR during the period was \$ 2.48.
- Categories that posted double digit growth during the period include Suits/Ensembles (77.04%), ladies dresses (31.66%), babies' wear (29.02%) and nightwear (26.30%).
- Some categories that posted negative growth during the period were legwear (-) 36.42% and undergarments with (-) 15.07% negative growth.

Pakistan

- The country posted a negative growth of (-) 12.40% in value in its exports to the US during the defined

months as compared to the same period last year. Volumes also declined by (-) 7.85%. The UVR stood at \$ 2.05.

- The category that posted the highest growth during the period was ladies skirts with growth of 9.85% increase. Other growth products were ladies' blouses with 7.46% growth, jackets & blazers 3.78%, legwear with 3.12%.
- Most other categories brought losses to Pakistan.

Sri Lanka

- During the period, Sri Lanka registered negative growth of (-) 15.28% in value and (-) 16.37% in volumes.
- The UVR for the period was \$ 4.64, the highest in the region.
- Foundation garments with 11.26% growth are the only real growth sector of the country.

Vietnam

- Vietnam registered a decline in exports of (-) 3.36% in value while seeing a positive rise in quantities of 4.71% during the review period.
- The country registered an UVR of \$ 3.18 for the period.
- During the review period, Vietnam registered maximum growth in undergarments and sweaters with 97.86% and 92.32% increase, respectively.
- Legwear registered the highest negative growth of (-) 37.11%. Besides, Suits/Ensembles which also saw decline of (-) 19.11%.

TOTAL APPAREL EXPORTS TO THE US BY INDIA AND ITS COMPETITORS

Country	Jan.-Oct. 2008		Jan.-Oct. 2009		% change	
	Qty	Value	Qty	Value	Qty	Value
India	749.98	2,656.30	780.06	2,461.86	4.01	-7.32
Bangladesh	1,219.18	2,937.17	1,184.34	2,933.33	-2.86	-0.13
China	6,681.88	19,611.67	7,247.71	19,890.09	8.47	1.42
Pakistan	582.83	1,255.27	537.09	1,099.56	-7.85	-12.40
Sri Lanka	320.06	1,466.98	267.65	1,242.84	-16.37	-15.28
Vietnam	1,289.29	4,438.99	1,350.04	4,289.78	4.71	-3.36

Qty & Value in mn M² & US \$

ITEM-WISE PERCENTAGE INCREASE IN APPAREL IMPORTS BY US: OCTOBER 2009

APPAREL TYPE	Total Imports by USA	Exports to USA					
		China	India	Bangladesh	Vietnam	Sri Lanka	Pakistan
Babies Wear	-5.04	-10.14	25.80	29.02	0.81	-11.26	-8.24
Foundation Garments	-9.56	-1.63	-7.48	2.33	-1.01	11.26	-
Jackets & Blazers	-12.83	-19.21	-6.69	2.49	-16.38	-38.31	3.78
Ladies Blouses	-10.59	-11.55	-3.20	-1.79	10.76	-1.18	7.46
Ladies Dresses	-3.85	-6.52	13.62	31.66	16.02	1.57	-15.92
Ladies Skirts	-16.64	-23.46	15.47	8.28	5.48	-4.29	9.85
Legwear	-8.08	11.70	39.81	-36.42	-37.11	-	3.12
Men's Shirts	-14.90	4.12	-20.14	-7.36	-5.50	-14.85	-11.28
Nightwear	-13.93	-20.94	-11.51	26.30	6.22	-37.63	-21.99
Suits / Ensembles	-30.64	-24.30	-1.20	77.04	-19.11	-57.32	-47.91
Sweaters	-24.26	-1.00	-17.89	-2.49	92.32	-88.28	-27.17
Trousers	-13.51	20.65	-23.26	5.63	-3.67	-15.58	-17.35
T-Shirts	-13.35	25.80	-11.91	-10.85	-3.71	-33.27	-15.98
Undergarments	-15.09	20.30	-1.52	-15.07	97.86	-14.68	-10.20

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AWARDEVENT

166 Export Awards to Handicrafts Exporters

Consecutive Award to Ozone International in Textile Segment for 3 Years

The 16th Annual Export Awards were conferred to 166 handicrafts exporters for their great performance during the last three years – 2005-06, 2006-07 and 2007-08 – by EPCH recently in Delhi.

While presenting the Awards, **Union Minister for Textiles Dayanidhi Maran** stressed that the achievements of the sector are the result of combined efforts put in by entrepreneurs, support of valued buyers, hard work by the craftsperson coupled with cohesive policies framed by his Ministry.

Maran appreciated the “Future Road Map” prepared by EPCH (Export Promotion Council for Handicrafts) for increasing exports and advised EPCH to diversify to new markets like Latin America, Africa and Gulf rather than depending only on the traditional markets like US and Europe. He urged EPCH to prepare a long- and short-term strategy for Latin America for opening warehouses, showrooms and other marketing network so that exports can move smoothly and locational disadvantage is overcome. He also suggested that “Towns of Excellence” and “Mega Clusters” like Jaipur and Anantanag (Kashmir) announced by the Ministry of Textiles should be strengthened by EPCH by providing facilities for improvement of product, design, quality and also providing market platform through theme-based trade shows.

The Minister also emphasized on the need for linking health scheme for the crafts persons with exports so that better environment can be created for them. Maran assured the EPCH and the exporting community of full support for bringing back the exports to the level which existed in 2007.



Vasudevan, MD, India Merchandising Services receiving the Life Time Achievement Award from Textile Minister Dayanidhi Maran at the award function

The handicrafts sector has gone through a bad patch during the last year as the exports declined more than 48% primarily because of economic recession in the main markets, viz. USA and Europe and appreciation of rupee value *vis-à-vis* dollar. The Government of India had announced a stimulus package and other measures like “Focus Products Scheme”, rationalization of drawback rates, etc. to help the export community. As a result, decline is now restricted to 15% during the period April-November 2009.

Raj Kumar Malhotra, Chairman of the Council, highlighted the specific measures taken by EPCH for boosting exports such as capacity and skill development programme, setting up of 25 new production clusters, developing and creating new product lines based on natural fibre, in addition to aggressive marketing through exhibitions, fairs, buyer-seller meets, stand alone shows, folk crafts festivals and brand

and generic publicity and product specific catalogues for promotion of exports from this sector, in which more than 6 million people are directly employed and many more millions in allied industries to support exports.

Rakesh Kumar, Executive Director, EPCH, was positive that the prevailing scenario in the industry indicates that there should be a complete turnaround in the downtrend in exports with the beginning of the next financial year.

Export Performance of Handicrafts Industry

The exports of handicrafts during April-November 2009-10 have shown a decrease of Rs. 268.25 cr. from Rs. 4680.37 cr. to Rs. 4412.12 cr., a decrease of 5.73% in rupee terms over the same period last year. And in dollar terms, the exports decreased by US\$ 162.09 mn., from US\$ 1074.39 mn. to \$ 912.30 mn. registering a decline 15.09% over the similar period last year.

Awardees in Textile-based Handicrafts

2005-06

- Krishna Sales Corporation, Noida
- M&A Orient Accessories, Noida
- Ozone International, New Delhi
- Ramakrishna Paramahansa & Co, Seetharamapuram, Andhra Pradesh
- Sri J.J. Lakshmi & Co, Seetharamapuram, Andhra Pradesh
- Globe Enterprises, New Delhi
- Malani Impex Inc., Jaipur
- Jayanita, Delhi,
- Globe Enterprises, New Delhi
- Malani Impex, Jaipur
- Neerja International, Jaipur
- Promila Emporium, New Delhi
- Creative Creations, Varanasi

2006-07

- IACS, Noida
- Sri Devi Exports, Rajahmundry, Andhra Pradesh
- Ozone International, New Delhi
- Sri J.J. Lakshmi & Co, Seetharamapuram, Andhra Pradesh
- Ramakrishna Paramahansa & Co., Seetharamapuram, Andhra Pradesh
- Malani Impex Inc., Jaipur
- M&A Orient Accessories, Noida

2007-08

- Ozone International, New Delhi
- Malani Impex Inc., Jaipur
- House of Incas, New Delhi
- JC Antiques & Crafts, Jaipur



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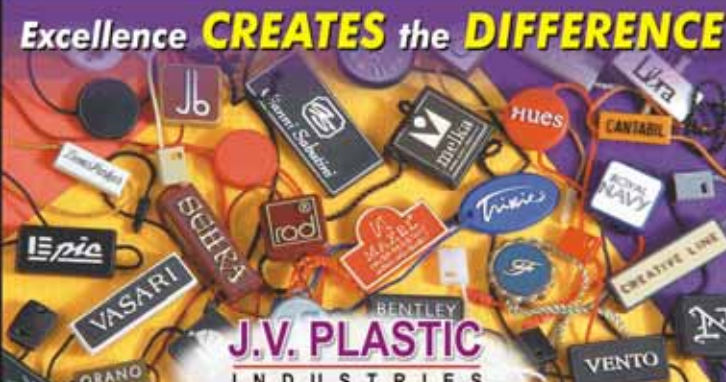
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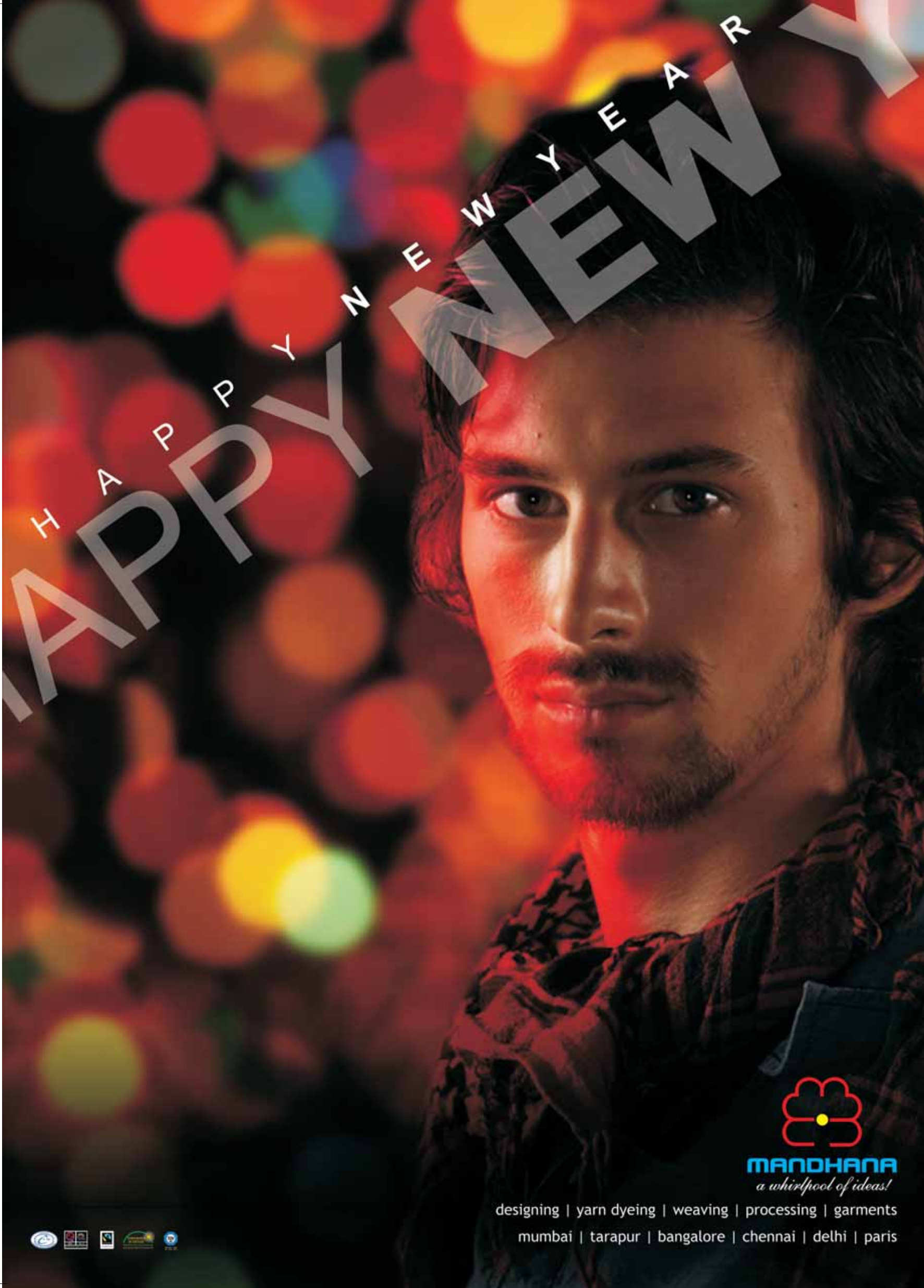
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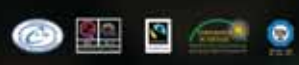


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Unisource Ventures Aims to Tap Six New Markets in 2010

Unisource Ventures, a buying house based in Mumbai, started its operations in India in February 2009 with an aspiration to become a procurement partner for international retailers, brands, wholesalers and importers. The idea behind initiating the venture was to create a holistic stop for international retailers/brands which offers apparel as well as retail solutions.

Unisource has its roots in being the global sourcing and operations office for Steve & Barry's. Today, Avi Sonpal the former MD of Steve & Barry's buying operations in the region and Khyati Bhide also associated with the same are positive that they can take their new venture to similar heights. "We are just a year old in India and with economy improving; we expect a growth of 80-100%," says **Khyati Bhide, Director, Unisource Ventures**. The company is also considering opening up of a centre abroad to offer localized services and create an overseas presence of their own.

At present, Unisource Ventures is working with apparel companies based in Spain, the Netherlands, USA, Australia and New Zealand and further aims to tap six new markets by the next financial year. The products that the company offers is a very wide range from basic polos to sequined dresses. Its apparel sourcing offerings include knitted, woven, sweaters, outerwear, innerwear, and accessories for men, women and children.

With years of experience behind them the team has also been a part of launching and managing celebrity lines like Bitten by Sarah Jessica Parker, Dear by Amanda Bynes, Eleven by Venus Williams, Starbury by Stephon Marbury, Wonderwall by Laird Hamilton and Bubbagolf by Bubba Watson. Khyati is



Two styles developed by Unisource Ventures for its buyers

confident that they can handle similar operations in their new setup.

Unisource specializes in trend forecasting, design presentation and story boards, textile design and CAD services, apparel, graphic and technical designs also. It offers quality assurance like fabric inspection, pre-production inspection, pilot inspection, inline and midline inspection and final random inspection. "The idea is to give complete product management services to the buyer," says Khyati.

Their main focus is to get buying contracts for the Indian exporters from the overseas clients by adapting to their process, systems and product requirement. Unisource, at present, is looking forward to join hands with new small or medium sized vendors specializing in performance wear, swimwear, beachwear and woollen garments. "This task is a real quest as it is difficult to find vendors which manufacture these products, but we hope to add these product lines in the New Year," concludes Khyati.

Interconti Project Looking to Expand Market Reach into Specialized Products

Delhi-based buying office Interconti Project has started sampling for specialized products in an effort to expand their offerings to buyers. "We are looking at products like sportswear with technical textiles, medical application garments like blood stain proof coats and other items that can add value to our sourcing basket," says **Rajkumar Rai, GM Interconti Project**. The company which is working in the German market sources for Betty Barclay, Sports 2000, PMT, Miles and Eisel GmbH.

Currently the buying office is into high fashion garments. Beaded and sequined dresses are sourced at FOB Euro 30-35 onwards, while tops are in the

range of Euro 15-20 upwards. The company also deals in leather garments with FOB prices at Euro 60 and above. The urge to enter a new market segment was brought on by the fact that their existing buyers are placing good orders for technical textile-based products in China and with the country becoming expensive there is scope to bring the business into India. "From the response that we have received for our sampling we are very hopeful that orders should come in," says Rai.

Some of the directions for product development include ultraviolet protection, anti-bacterial, bamboo fibres and organic cotton.

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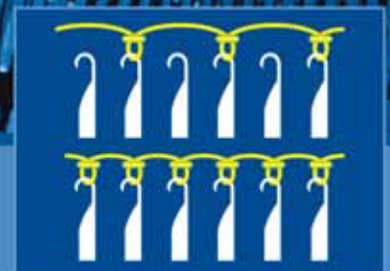
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