

Apparel Online I N D I A

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World Wrap

Europe on the verge of retail growth, finally! Are the manufacturers ready for the next phase of boom? After many years of remaining on the backfoot, the EU economy finally looks to be on an upward projectile...**p12**

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FROM THE EDITOR-IN-CHIEF'S DESK...

I have said this time and again, yet I would like to say this again..., there are too many fairs of the same content happening..., that too practically back-to-back!

Not only are the participants exhausted with the pressure of deciding where to exhibit and how to manage manpower for the same, not to mention the displayed products, but even the industry is confused on which event to attend. Only recently, Ludhiana was witness to three technology events in a span of less than two months. Obviously, each fair lost a few visitations to the other...; just imagine what would have been the result if all the three fairs were combined to create a huge event, celebrating technology! And the clash is now no longer limited to national fairs...; this year the IIGF in New Delhi clashed with the Hong Kong Fashion Week due to which many buying teams were forced to take a pick on which event was more important for their buying strategy.

Only a few buyers had the determination to attend both fairs, but many of them admitted that they could not spend enough time at either of the events to really get full advantage of the visit. Twice a year – January/February and July/August, the industry is 'bombaraded' with exhibitions and making a choice and prioritising can be a big challenge. No one can deny the importance of attending fairs, as not only do they update the industry on trends – in fabric, garments, technology, accessories etc., but also serve as a platform for interaction with people of diverse ideas and getting feelers on how the markets are moving.

Yet, enriching as they are, exhibitions lose their charm if they become routine and repetitive! Understood, fashion fairs need to happen twice a year because fashion is on the fast track and collections are made and discarded almost simultaneously. But better date planning will help buying teams to manage their trips more fruitfully, while also giving the exhibitors a chance to check out what other countries are up to.

Technology fairs, on the other hand, can easily happen after 2/3 years when there is something new to showcase. In-between, technology companies can hold private shows to display new updates on their machines. As long as the shows are in the hands of private organizers, commercial considerations will drive all decisions. I think the industry needs to come together on this issue and collectively decide as to when and how many shows should happen?

At a recent event, one of the top technology providers implored me to take the matter up as a service to the industry, highlighting the seriousness of the issue. This is not a new request, and over the last few years, the noise has been getting 'louder' as exhibition fatigue is setting in. Both the exhibitors and the visitors need value, not just quantity.

Also justifying so many fairs with the excuse that India is a huge country, is not rational. If people are serious about technology/fashion trends, they can travel to China, Europe and the US for fresh ideas; or can certainly travel within their own country for a 'must visit' event!

I hope the organizers of 'mature' shows are listening... It is time they take a pragmatic approach and pay heed to what the exhibitors and industry are saying, before it is too late...

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Q-and-A

Since prices in China are increasing and reasonable number of apparel and textile orders are being shifted from there, these conditions must be having some reciprocal effect on allied industries also. As India is importing big chunk of trims/accessories from China, have you noticed any kind of impact on trims, coming from China...; Are the prices still the same or have increased...; Is there any pressure to increase order size... Which is the most affected product category in trims and how are you coping with this situation?

■ **HKL Magu**, Chairman,
AEPC, Gurgaon

Yes, overall costing in China is increasing due to increase in wages; but as far as your question of increase in the price of trims is concerned, there is no impact. Even if it is there, it is a marginal increase and we can't do anything as it is all about nomination by overseas buyers. We can't negotiate with nominated suppliers and everyone knows how they are. As our company works with stores and mail order companies, they always work with nominated people because they don't buy only from India but also buy from Bangladesh, Cambodia, Vietnam, etc. So, they have nominated people in China or Hong Kong, from where they source the required trims and supply to different suppliers. Overall my organization, Jyoti Apparels, uses 70 per cent of imported trims.

■ **Vinod Kapur**, MD, Radnik
Exports, Delhi

We don't import much from China but whatever we import, we do it through our own representatives in China who handle all things, be it price or quality. Prices may have increased 5 per cent which is nominal looking at overall costing. Whatever total trims

we use, out of that just 2 to 5 per cent is being imported from China. So, this is not much an issue.

■ **JD GIRI**, Director, Shahi
Exports, Faridabad

I don't see any increase as such. Exporters are now buying a lot of trims from India as there are many good companies like Tex Zippers, YKK and many more; we too are sourcing majorly from India. In case it is nominated by the buyer, then we have to take it from the designated supplier. Otherwise if a choice is being given, we prefer to procure it from local companies or local manufacturers. Secondly, whoever the trims suppliers are, they are also quite competitive looking at the market scenario. Even in the case of fabric, there is heavy intense competition. So, there is no major impact on prices of imported trims.

■ **Sarhi Sawhney**, Director,
Bright Star, Delhi

Many customers give a nominated supplier and pre-fix pre-negotiated prices of the trims which we can exactly add in the costings. More than the price of the actual trim, factors which really affect our costs is the 'red tape' culture

surrounding India's importing system – from high bank charges to T/T payment – to a day's time taken in paperwork to be submitted to the bank. There is high surcharge on freight to India, and thereafter Customs duty being levied on these trims which will essentially be 100 per cent re-exported. Even after having provisions like IC and RCMC, it is a hassle to deal with Customs officers to make them understand why duty should not be levied. And if we pursue to work with Customs officers, we are at their will and mercy of coming to the terminal otherwise demurrage charge can tick off. Simple, clear and instructive policies should be framed by the Ministry of Textiles in consultation with the different textile councils as well as in unison with the CBEC to make this a smooth process. Import systems and bank payment systems in all other countries (including China) on the other hand are extremely forward thinking and conducive for smooth business.

■ **Sushil Aggarwal**, MD,
Eves Fashion, Delhi

Normally, trims contribute only 10 per cent of the cost of a garment, and the question is not about that 10 per cent as one can use Indian-made trims or imported ones which are cost-effective than India-

made. As per my point of view, the question is that we need more exposure in value-added items and it should not depend only on trims, be it imported or Indian-made. For example, India still has not explored the core strength of Lucknow's chikan embroidery, besides the various traditional types of dyeing from Rajasthan, etc.

■ **Yusuf Dohadwala**,
CEO, Intimate Apparel
Association of India,
Mumbai

There is no impact, as trim manufacturing is capital-intensive rather than being a labour-intensive industry and costing in China is increasing due to high wages. Here I must say that still India is very much dependent on China regarding trims, specially in lingerie segment. All this is despite the high logistic cost and currency fluctuation.

In mid-price lingerie segment, at least 50 per cent trims are being imported from China while in premium segment, the same will be nearly 70 per cent out of total consumption. In few cases, Chinese accessories may be little costly too but despite that Indians are forced to import due to quality and bulk production. So, there is no comparison in price of Indian and Chinese trims, same is expected to continue for at least the next few years.

▪ **Shakti Jain**, Director,
Great Eastern Impex,
Gurgaon

To the best of my knowledge, there is no such impact of any Chinese development on our barcode labels industry. Though I am not very much sure about its reason, but easy availability of raw material in India and comparatively smaller order quantity from Indian garment manufacturers, seem to be the big reason for the same. Hardly, 10 to 20 per cent of allied trims

to our segment like fabric tape, nylon taffeta, etc. is being imported from China.

▪ **Manoj Tulsani**, Director,
Red Square Enterprises
(BTW), Ulhasnagar

As far as our product category of embroidery thread is concerned, there is no impact from Chinese products. India's focus on large variety in term of colours, and especially increasing manufacturing in

Surat and other hubs, are enhancing India's strength in this segment. Anti-dumping duty by India is also in our support. On the base of industry estimates, I can say that only 20 per cent of India's consumption in this product category is coming from China, which is into basic colours and viscose-based products but with time this will also reduce. I must say that in our segment, if one can offer proper colour and quality, price is not a very big issue.

▪ **Dev Kumar Bansal**,
Pearls of India
Consultancy & Sourcing,
Ghaziabad

There is no big impact on Indian apparel export industry from outside and especially in trims' import; the main impact is from inside. Widespread corruption, dishonesty and tax evasion are the root causes. All this is happening under the nose of factory owners. Why are these issues being overlooked?

NEXT MINDTREE QUESTION

Buyers & brands claim that they offer lot of support to their vendors, be it raw material sourcing, training, worker welfare initiatives or allied issues which generate from time to time... How supportive are buyers in today's challenging time, considering that they too are facing many market pressures? Have you got any support from buyers in recent months? What kind of support do you expect from buyers in today's context?

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Europe on the verge of retail growth, finally!

Are the manufacturers ready for the next phase of boom?

After many years of remaining on the backfoot, the EU economy finally looks to be on an upward projectile. 2017 can safely be considered as the turnaround year for the economy, with positive news on many fronts auguring well for the future. The recovery remained consistent throughout the year and was in high gear in the final quarter of 2017, as exports grew considerably in November and the unemployment rate fell to a multi-year low in October. Significantly, the FocusEconomics panel raised its GDP growth forecast for the fourth consecutive month and now sees the Eurozone growing at a strong 2.2% in 2018. Ironically, the Euro area economy is enjoying the strongest period of economic growth in more than a decade, despite lingering political uncertainty.

According to the recently released –The FocusEconomics Euro Area Report – Ireland, Latvia and Malta are forecast to be the fastest-growing economies in the Euro area this year, expanding at rate of 3.8% or above. Conversely, Italy will be the region’s slowest-growing economy, with a forecast of 1.4%

ESSENTIALS

There are opportunities in sportswear and athleisure categories, with garments offering performance benefits such as breathability, moisture wicking, multiway stretch, or waterproof, quick-dry and smart fabrics that can measure body metrics, having a definite edge over regular garments.

Consumer demand by product type



Women’s and girls’ apparel is the largest segment, worth **€ 135 billion in 2017** and accounting for **38%** by value or **20%** by volume.



Men’s and boys’ apparel is the second-most valuable at **€ 90 billion in 2017**, accounting for **25%** by value or **10%** by volume.



Underwear is third at **€ 48 billion**, **16%** by expenditure or **25%** by volume.



Hosiery is valued at **€ 16 billion**, **5%** by expenditure or **23%** by volume.



Sports and swimwear are worth **€ 9 billion**, **3%** by expenditure or **2%** by investing in innovative processes that consume less water or dyestuffs and generate less waste as many retailers have committed to **100% sustainably sourced** materials within the next decade.



growth. Regarding the other major economies in the region, Spain will outperform the rest, with a 2.7% expansion. Germany's economy is seen increasing at 2.3%, followed by France's at 2.0%.

The retail scenario in the Western and Eastern part of Europe are poles apart. While the value of the total retail market in Western Europe in 2017 reached around 2.6 trillion euros, the retail market in the Eastern part only reached 565.6 billion euros, a noteworthy difference, though both are on a growth path. It cannot be overlooked that the west of Europe has many prospering countries, such as France and Germany. The market value of retailing in Germany alone covers one fifth of the total retailing in Western Europe, and when combined with France, the total retailing accounts for nearly half of the whole of Western Europe. The main growth in retail has been coming from online sales. A report by Forrester predicts that online retail sales will grow at an average of 11.3% per year over the next five

years in Western Europe. Italy and Spain will see the fastest online sales growth, and by 2022, 20% of non-grocery retail sales will be online.

Emerging markets in Eastern Europe such as Romania, Poland and Slovakia have rapid growth rates for GDP at over 3%, but they are coming from a lower base than more mature economies in Western Europe and pay lower wages. A fact to be considered is that going forward these markets will be attractive to manufacturers who can compete on price. So Eastern Europe may develop as a conducive manufacturing base for Western Europe in the next decade. Also those manufacturers that are fast and flexible suppliers operating close to Europe with a vertical supply chain will have a good chance to connect with retailers who buy short runs of on-trend products with a view to selling out before having to reduce prices.

In the meanwhile, manufacturers from other sourcing destinations looking to service the improving

retail scenario in Europe have to be very careful in approaching the market. So, what are the factors that can impact growth for apparel retail...? For one, products must clearly stand out from the rest because of their design, origin, production technique involved or story behind them. There are opportunities in sportswear and athleisure categories, with garments offering performance benefits such as breathability, moisture wicking, multiway stretch, or waterproof, quick-dry and smart fabrics that can measure body metrics, having a definite edge over regular garments.

Retail experts are of the opinion that countries that benefit from Europe's Generalised Scheme of Preferences (GSP), will be preferred, provided they combine this aspect with highly efficient production in order to offer a cost price advantage over competitors in non-duty-free countries or a better product at an equivalent price level. Further, while countries in Europe may show similar macro-trends, the competitive landscape is unique for

each one. The best way to find out which country matches the offerings that a manufacturer may have, is to conduct detailed research on each country, looking at product segments and price levels.

The secret of future growth of business in Europe is to develop styles that can be partially prepared in advance and are only finished according to the final consumer request, possibly at another location closer to the point of sale. The reality is that if a manufacturer can offer the flexibility of shorter production runs and/or quicker lead times, such offers are in high demand. This strategy can help to meet the growing consumer interest in customisation and premiumisation.

Another important direction is to improve sustainability performance. The race is on to industrialise the recycling process and to create a circular economy for clothing. The bottom line is that European retail is finally looking up and apparel consumption in the region is forecast to grow to € 372 billion by 2020.

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She is beautiful but **not like those girls** in magazines.

She is beautiful for the way **she thought she is beautiful**, for her ability to make other people smile.

Other people smile. She is beautiful **deep down her soul**.

THAT'S A WOMAN!

The beauty of this industry is that it has absorbed so many women at various levels seamlessly into its fold – from the First Fashion Designer to go Global, Ritu Beri, to a State Coordinator of ATDC, S. Padmavathi... All these women are torchbearers of the power of women in this industry. Playing multiple roles at work and at home, these women have broken the barriers and raised the bar. On this Women's Day, *Apparel Online* dwells into the minds of 8 women who are playing critical roles in their professional life, dreaming big and are proud to be a woman in a demanding industry.



RITU BERI

CEO, Ritu Beri Designs; and
Founder, The Luxury League

Inspirations...

I grew up watching my parents who are very well dressed...; while my mom has an intrinsically impeccable style, my father – an army man, was fastidious about his appearance with a natty sense of dressing... With such fine examples, around me, I had to be inspired.

I am a dreamer who enjoys 'impossible' situations; I put all my efforts to bring challenges to reality.



OSHI LAMBA

Country Head, Montrose
Knitwear (I) Pvt. Ltd.

The journey...

This year, on 1st April, I am completing 25 years of working in this industry. Looking back, it has been extremely fulfilling and rewarding. I'm still learning every day, and each day is a new experience! I always wanted to be part of this industry and all these years behind me, I am so happy I chose to do what I wanted

I love to explore new possibilities and work in an inspired mode while mostly designing to satisfy myself. I love taking risks and like to follow my own chosen path. I try to be a perfectionist and aim at achieving the impossible, always. I am inspired by life in general. I believe that every new day comes with new ideas, aspirations and dreams.

The journey....

Today after 27 years, I still love my work and enjoy fashion immensely. I have always been supported and backed by my parents; my passion for design helped me achieve whatever I have achieved till now. For a successful career, one should be self-motivated and should have self-confidence in oneself even if it includes breaking the norms. I have learned a lot and evolved tremendously as a designer and even more as a person. Today I have come a full circle and know what I should do and more specifically what not to do. I am very glad and proud to make my life the way it is at present. I have

put my efforts achieving such heights where I stand today, as an international designer. Each experience taught me something new about life.

My creations are very versatile and are greatly influenced by my personal state of mind. I love to explore impossibilities. I have done many collections taking inspiration from different cultures. In the past 25 years, I have chased my dreams and worked on ambitious projects... There were many hindrances but I want to explore the impossibilities and work in an inspired mode only to satisfy myself and my passion.

Milestones of my journey...

High points in my life would be Paris and Scherrer. Back then, not many Indian designers had done shows in Paris, and for an Indian designer to be heading a French fashion house was an impossible dream. And being featured in one of the best international fashion forecast magazine 'Promostyl' has been truly

memorable. Working with Francois Lesage was a lifetime experience. I learnt from all my mistakes and they became part of my final achievements; therefore, I consider them not a struggle but a memory as part of my journey. The key is to give your best in whatever you do.

Work-home life balance...

Ritu Beri as a person is family- and friend-oriented; she is more of a home-bird, loves her own space, and is very chilled out and relaxed. "Life is short. Take the juice out of it and enjoy all you do."

For me family has always been a priority and there is no compromise on work either, it's all about striking the balance and we get there sooner or later. When working for yourself, work 24x7. I try my best to find a balance between achieving all at work and spending time with my daughter, Gia, and family. Sometimes I take Gia to office with me. The key is to give your best to whatever you are doing. .

NAMRATA RAINA

Sourcing And Merchandising Manager, UCB, Noida



The journey...

It's been about very good 15 years in the apparel industry. Definitely by choice, I had done my degree in Textile Engineering... Overall it has been an enjoyable learning experience, being associated with good companies and wonderful mentors (as my bosses) who were tough but at the same time taught me the key to being a balanced professional.

Gender bias is in the mind...

I have spent a long time of my career in manufacturing operations, so it is imperative to go out to the actual work sites and review progress of bulk production. On one such site of handwork and tie & dye factory, located in interiors of the region, we had quite a big order being sub-contracted. When I went to this site, to my surprise, I saw maximum workforce as women who were equally surprised to see me since they were mostly used to seeing men officers visiting. It was quite interesting to interact with them and know how they would leave inhibitions, struggle every day, manage and be courageous enough to deal with the taboo of 'being a woman and a bread winner'. It was quite inspiring.

to and hope I continue for many more years!

I have had the opportunity to turn my aspirations into my ambitions. To be able to make a living out of what you enjoy doing, is definitely an achievement in my perspective. Additionally, during this journey, I have been fortunate to have met and learnt from so many people. Some of whom have become life-long friends.

The experience of working in this industry offers the opportunity to interact with people from different walks of life. Right from the labour whose hard work is integral to working with CEOs, one learns tremendously about life actually! I have been exposed to people from different cultures, age groups, learnt to appreciate that each individual has their own unique potential. Working with the millennials keeps me young and motivates me each day to be a better version of myself. My

daughters joke that I am more fashion-conscious and social media-savvy than them. I owe it to the young and vibrant industry I am a part of.

Industry is sensitive to women...

I always cherish how my daughters tell everyone how proud they are of me and what I do. When I started working, it was not commonplace for women to work. My first employer was someone who not only gave me a professional opportunity but whose encouragement and confidence really helped me flourish at work and also manage my family. He offered me flexible hours, let me bring my daughters to work when there was no one to look after them and gave my role as a young mother a lot of consideration. When I joined the industry, things like 'flexible hours' and 'child care leave' were

not even spoken about. And now even after so many years I can still say that I have a very supportive Boss who gave me flexible time for the marriage preparations of my daughter. I attribute a lot, of who I am today in my industry, to my family and the organizations I have worked for and with.

Work-home life balance...

The passion for this industry gives me extra strength to manage work and my family life. The long hours and extensive travel can sometimes take a toll and therefore one requires an understanding and supportive family. Employers play a crucial role in helping women maintain a work-life balance. Their understanding of women's roles for their families is very important. On the personal front, I enjoy cooking, travelling, mandala painting, and spending time with my family.



ARCHANA TOMAR MANN

Group Head – Compliance, CSR
& HR (Wovens and Sweaters),
Orient Craft Limited

The journey...

It's been 10 years now in the apparel industry and this has been possible only because it's always been my choice to work for worker's welfare and upliftment and it gives me a sense of accomplishment and happiness when I am able to bring change in someone's life. Everyday has its own set of new learnings, challenges and accomplishments. Apart from playing different roles at workplace, I am also playing the role of a mother in my personal life and I always ensure that I spend quality time with my kid that works as a great stress buster for me.

Is this industry gender bias...?

Yes, to be very honest! Few years back, there were gender biases as we work with people from all walks of life. So having gender

bias comes naturally, but thanks to the unwavering support from top management and the buyer's involvement towards worker's welfare and sustainability, it has improved the situation of apparel industry tremendously. Various buyer-related projects like P.A.C.E (GAP), Leadership for Life, HER Respect and Gender Equality (M&S) and POSH Strengthening Through Next, etc. have played a vital role in changing the mindset of employees at workplace. As I personally feel that without mindset change, the story remains the same. Since I have taken a leadership role I have realized that people don't easily accept woman leadership, so there is a need to promote woman leadership. I feel blessed to be associated with Orient Craft as it always promotes women upliftment as our CMD Sudhir Dhingra strongly believes in female leadership and empowering women.



REKHA MENON

Executive Assistant to
Directors, Texport Industries,
Mumbai

The journey...

I have been working with this industry since the past 18 years and am very happy to be a part of it. It is enjoyable because it gives a lot of exposure to the new technologies and new working styles. It makes an individual more capable and increases his/her capacity of giving more output. The industry is appreciative of hard work and the gender of the person is inconsequential. It's more subjective as everything depends upon the grasping power of the individual, organized work skills, presentation of projects, ability to interact with clients in a graceful way. And this is done by all individuals efficiently, irrespective of gender.

Commitment has no gender...

I take care of the travelling itinerary of the management and the senior staff members of my organization. In the year 2010,

on an unfortunate day, there was a 'Mumbai bandh' declared at midnight and curfew the following day. I was having one of the prime client's passport and tickets in my office shelf. He had a flight on the same day in the evening, so I had no option but to go to office to handover his documents. So, I left my home and got into the train in which there were hardly any people. After some time, there was a huge crowd pelting stones from outside and we ladies in the train, sat down under the seat to avoid any injuries. The situation was brought under control after the cops came.

On reaching my destination, I saw there was no soul on the road and walked fast to reach my office. As soon as I reached my office, I saw the person waiting for me. He had reached office safely as he was booked in a hotel close-by and had a private car. I handed over his passport and tickets and he thanked me profoundly for the

same. That gesture was more than enough for me to feel proud and successful. This incident I can never forget in my Life.

The missing link...

From a woman's perspective, the missing element in this industry is the never-ending work time. The garment industry should allow flexible timing for women, especially in the morning, which is critical for women with school-going children.

Off work, I am a regular housewife...

I prefer to complete all my duties at office and make myself available for my family during my weekly off days – Saturdays and Sundays. I pay attention to the weekly cleaning of my home, storing my groceries and vegetables for the week, planning the weekly menu and go for some shopping or a movie with my family.



PRIYANKA GUPTA

Senior Merchandiser,
Jagmini Micro Knit, Kanpur

The journey...

I entered the industry 7 years ago after doing PG in Marketing. The opportunity to work in International Business came by accident, when my first company Raymond Limited which was a campus placement discovered my personality to be most suited for IB department and selected me for that division.

The journey has been fantastic, as export involves interacting with people from all around the world which helps in understanding different work culture. It grows our personality as an individual. It also helps in understanding as to what is happening in the entire world instead of being restricted to only one single market.

Work-home life balance...

This industry is demanding and it becomes sometimes difficult to take out time for friends and family. I have followed one rule strictly and that is to be absolutely punctual with reference to office hours. No late coming and no sitting late. Initially, I faced problems in getting support of my colleagues and staff working with me, and about me leaving on time. But then later when everyone noticed that my work was always up-to-date, everyone started

completing things on their time. It actually helped making other people punctual. I believe if all are punctual and organized, then entire work can be finished in much lesser time but same doesn't happen in India... Abroad, the culture of working late does not exist because they are very well organized.

Secondly, I take regular holiday breaks. I try to manage two small breaks and one 10-15 days break once a year. Travelling is a very big stress buster and I make sure that I don't stop on this. I truly believe that work place should be made more enjoyable and relaxed in order to promote more and more women for work. Most of the women are not working only because of the huge working hours and pressure. Office timing should be flexible, Saturdays should always be off and leaves should be provided like 30 days minimum in an entire year in which taking 10 days should be compulsory.



NEHA SINGH

Manager – HR & DCS (Plant-Coordinator), Richa Industries Limited, Kashipur (Faridabad)

The journey...

It's been more than 5 years working with Richa Industries limited and understanding the business of textile, garments, pre-engineered steel building & EPC, the divisions where the company is presently located. I entered into this industry without any mind make-up or without giving it any future thoughts. I am an MBA Graduate in Human Resource Management along with Diploma in Aviation & Hospitality Management, but as we all know

that textile and manufacturing sector are not so organized. Initially it was a challenge to enter in this type of industry however as time went by, the accident has turned into a life-changing experience. The journey of the past five years has taught me so many new things and developed the professional in me.

Growth is not gender-related...

Gender bias is far more deeply rooted than we may realize. The unconscious bias that men are more closely associated with work, and women with family, is often what keeps women from advancing in the workforce... But, I have never faced any challenge of gender biasness at Richa. If I am comfortable in executing the task, then my management supports me in the same. Recent example was of me taking transfer to Kashipur manufacturing unit from the Corporate Office, which was not an easy decision for me. But as

I knew it will prove better for my future, so I have stretched myself a little extra and taken one step ahead. Further, the portfolio which I have added recently is 'Logistics' which is a man-dominated department. Earlier I was little overwhelmed to handle this portfolio, but with time, I have started enjoying this too.

Work-home life balance...

Every industry is demanding in current business scenario; it's only your work which speaks louder than your words. Family plays a very important role in every individual's life. To maintain a work-life balance, my idea is of a perfect Sunday and of timely execution of the task in a day so that evening time can be given to family. The best therapy to destress yourself is to enjoy with the family and your loved ones. Yes, if you can get more time, then taking a spa or having a lazy Sunday is also a good idea for destressing yourself.



SANGEETHA BALEKAI

CE Development & Catalyst,
Conquest Systems Services,
Tirupur

The journey...

I am leading the software division of our organization which provides Consulting, Software and Quality Assurance services to the garment industry.

I am in the industry since 1995 and working in this industry is purely accidental; I am a Graduate in Civil Engineering, did my Oracle courses, and now I am developing and implementing web-based ERP solutions for many industries, but primarily for the garment industry and its verticals.

The journey has been very enjoyable, the dynamism, the creativity, opportunity to continuously learn a lot of new things, meet, interact with a lot of people of different levels – Top Management, Buyers, Middle Management, Data Entry Operators, Production Floor Supervisors, QCs, and workers. Finally the satisfaction of

experiencing the improvement in the organization. The users also find our ERP tool very useful and sometimes teach me back how it works...

Is this industry gender bias...?

I wouldn't say this industry is gender biased; opportunity is open to all. It's good to see a lot of women in top positions when we go to textile conferences compared to other engineering conferences. In fact, the industry looks for women talent for the fashion mindset and multi-tasking ability to work with a lot of details. At the same time, I would say that, it takes a little more assertive stance for a woman to establish herself and to be taken seriously.

I remember one incident distinctly... In the early years of my career, I once contacted a person for a business opportunity. He gave me an appointment and I was there with full bubbling hopes, but when I met him, he was straight forward enough to say that he had no real business opportunity, but he was surprised to hear from a woman for marketing in garment industry and was curious to meet 'this woman'. I did not get any business from him, but was motivated to move forward beyond these boundaries.

During my professional life, I have met a lot of women who have little education but still are handling major activities in production due

to their sheer acumen and talent. If we see as numbers, the proportion of women in middle-management is still low and there is a lot of scope for women to come up to this position. With a little more perseverance, this can be achieved.

Work-home life balance...

Yes, the industry is very demanding, and I think that is also the uniqueness of this industry. One has to find ways to keep refreshed to face the next day. Work-life balance is a challenge; there have been days when we used to go home late nights regularly. Because my spouse is from garment industry, the nature of work was well understood. Parent's support was crucial in the upbringing of children. Without family understanding, balance is not possible. Yet the challenge of two things in the to-do-list of every working woman – to manage the kitchen and monitor children's home work, is always there.

Now working hours are more streamlined to decent hours of working. So, we can find some time to keep up with some regular workouts. I personally do morning walks, meditation and believe in learning creative arts which freshens and sharpens the mind. I am also learning classical Music and Taichi (martial arts). This prevents me from getting stressed and regulates better working. I also enjoy trekking, holidaying to sportive locations.

S. PADMAVATHI

Principal-II/State Coordinator,
ATDC, Karnataka



The journey...

I have been in this industry for the last 2 years and it is by choice. I am very passionate about my work, so it's enjoyable and I do not feel any stress though it is a very demanding industry, as clothing is a basic need for human beings. I feel proud that I am a woman first and associated with this industry. As we are into vocational skill training, we train the youth. Preferably 80 per cent women who get employed in the apparel/retail/fashion industry which is a great fulfilling experience, and I enjoy every moment.

Work-home balance...

I get appreciation from my family, friends, and colleagues that I balance my responsibilities at work and at home well. It's an art I learnt from my grandmother, who was excellent in managing time and multi-tasking.

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AO Analyses

Women 'power' on the shopfloor... not really!

South India better placed on women workforce

There are women operators on all 50 stitching machines in one of the sewing floors of Ludhiana-based **Superfine Knitters Ltd.**, and this floor is producing 2,700 pieces of tees per day. With an average of 54 tees per women per day, this factory has overall 40 per cent women and its young **Director Vivek Lakra** is geared up to increase this percentage to 80 per cent in next one or two years. But, this is not the norm as there are hundreds of factories which are having less than 10 per cent women workers. Even factories in the South, which claim to have a majority of women workers are still predominantly men-dominated, though the situation there is far better.

Though there is no official study or survey on how many women are actually working on the shopfloor and average man-woman ratio in factories, data collected from various sources indicate that the tilt is very much in favour of men workers, as of today. Even *Apparel Online* Top 100 exporters' survey, which includes data of man-woman ratio in various companies, observed that in 2015 the man-woman ratio on an all-India basis was 60:40.

In a recent transparency initiative, Primark, the UK-based clothing and accessories company, published for the first-time details of its suppliers'

factories with an overview of the number of employees in each factory and the male-female split. Surprisingly, out of 173 Indian factories working with Primark, the 21 factories in Delhi-NCR are having 10 per cent or even less women working on the shopfloor. There are however 7 factories of Delhi-NCR in this vendor list having 11 to 20 per cent of women workers. In Panipat, there are two suppliers of Primark and one of them has just 1 per cent women in one of its factories.

The distribution of women in factories of Delhi-NCR is very uneven, and even bigger companies are still banking on

men operators. At **Celestial Knits & Fabs**, of the total 1000 workers, just 50 (5 per cent) are women. Similarly, **CTA Apparels**, which has nearly 2,500 workers, has just 110 women on its payroll (4.4 per cent). There are many more such companies who have shared their men women ratio and some of them are having less than 20 per cent women workers. Even a company like, **Radnik Exports**, which is known for its best practices and HR policies too has around 21 per cent women in its factories. But then there are few companies that are breaking the glass top. One of the factories of **Pinnacle Clothing Company** in Noida, which has more than 500 workers, has 32 per cent women workers which is quite high, compared to many other garment factories of Noida. **Paragon Apparel** is another company having a good percentage of women workers (35 per cent).

There are some companies where women are at the helm but when it comes to women workers on the shopfloor, there is no reflection of the same. For example, **Moissanite Apparels**, Noida founded by **Anshu Saxena** with her husband **Vivek Saxena** has just 10 per cent women in its workforce of 1000 workers. **Orient Fashion Exports India**, Gurgaon



Women working in Superfine Knitters Ltd., Ludhiana

WHY SHOPFLOOR SHOULD HAVE MORE WOMEN?

- They are more disciplined and focused (don't consume gutka or tobacco)
- In most of the cases, they are more loyal towards factory
- Some owners believe that women comparatively ask less wages than men

REASONS FOR HAVING LESS WOMEN WORKERS

- Less availability in some of the hubs
- High absenteeism, compared to men
- Health issues are much more

POSITIVE INITIATIVE

- The upcoming apparel park in Greater Noida has option to keep 60 per cent reservation for women workers

growing under its **Chairperson Meena Sethi**, however does have nearly 32 per cent women workers. Some of the companies, having their factories in Noida and Bangalore, also do not seem to be having overall good ratio, like **Global Mode and Accessories**, which is having its factory and head office in Noida, and a factory in Bangalore, claims to have a total of 26 per cent women in its workforce.

Jaipur also has more or less similar conditions. **Cheer Sagar**, one of the most prestigious company of the pink city, has 16 per cent women on the shopfloor. **Hi Choice Exports**, the only exporter of Jaipur working with Primark, has 20 per cent women in one of its factories. **Lodha Exim**, known for doing maximum of its business with Japan, has 2 factories in Jaipur and 1 in Mumbai, but it too has 30 per cent women in total workforce. In Mumbai, there are factories like **Adiba Fashions** where women percentage is 0 but just 90 km away from Mumbai in Tarapur, **Mandhana Industries Ltd.**'s garment division has 57 per cent women workers. **Indo Count Industries** (home furnishing giant) running its huge unit in Kolhapur district has 9 per cent women.

Tirupur is known for having good share of women in garment factories. There are companies like



Bangladeshi factories too have good number of women in garment factories and some factories have set benchmark in this regard. For example, companies like **Universal Menswear Ltd.**, in its factory at EPZ Narayanganj, have more than 2,000 workers, out of which 90 per cent are women. Similarly, **Organic Jeans Ltd.** in its Chittagong factory has more than 1,000 workers with 90 per cent women workforce. Out of 89 Bangladeshi factories working with Primark, few have less than 40 per cent women workers.

There are 23 Vietnamese factories working with Primark and majority of these have more than 75 per cent women workers. **Excel Tailoring Vietnam Company Ltd.** in Yen Khanh, has 93 per cent women workers.

KPR Mill Limited which has 97 per cent women in its garment division. But, then there are many factories which have less than 20 per cent women like **Morning Star Apparels** has 19 per cent women. **SRD Garments** is another such name with 17 per cent female workers. Working for Primark, 23 factories in Tirupur have less than 30 per cent women workers. Interestingly, in two units at Bangalore with more than 3,000 workers, **MAF Clothing** has more than 82 per cent women in both the units but the same company, having a unit in Tirupur, has only 19 per cent women, though this unit has less than 500 workers.

Bangalore is the hub which is known for maximum women workers in the garment factories. There are many such factories having more than 80 per cent women workforce. **Apparel Online** explored many companies' men-women ratio in Bangalore and nearby areas and found that minimum women worker percentage was 52 per cent. But it is interesting to see that women are dominating shopfloor even out of Bangalore also. Away from Bangalore, few interesting examples are there. **Dignity Innovations**, Ambattur (Chennai) has 90 per cent women, and in Kerala, **Texport Industries** having unit in Kinfra International Apparel Park, claims having 85 per cent female workers.

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Nest Ethical Compliance Standards for Home and Small Workshops

A much-needed step in the right direction

There is an urgent need to bring homeworkers into the folds of compliances and regular monitoring for decent working conditions. In India particularly, a lot of handwork is done by women sitting at home with work coming mainly through agents or buying offices. These workers are not being regulated, similar to those working within the factory, often leading to disparity in both wages and working conditions. Taking the lead in this direction, Nest – a non-profit organization founded in 2016 and working towards building a new handworker economy to generate global workforce inclusivity, improve women's well-being beyond factories, and preserve cultural traditions of craft – is working hand-in-hand with brands, philanthropists, and artisan businesses to develop ethical compliance standards for home and small workshops.



The initiative – Nest Artisan Advancement Project – is in recognition of the enormous industry-wide need for reliable third-party assessment of artisans and homeworker supply chains that are often buried deep within the unregulated informal sector and complex subcontracting supply chains. It is intended that the verifications of these standards reflect the various layers within the complex supply chain of artisan and subcontracted labour. These standards provide the structure for the Nest Assessment Tools and inform any remediation programming, following an assessment.

The standards address various aspects of the supply chain business relationships among artisans, sub-contractors and wholesale and

retail businesses. Significantly, the standards do not supplant any local laws, rules or statutes that may apply. The objective is to use these standards to verify the ethical compliance of the decentralized aspects of production, ensuring that policies and procedures dictated by the central business are understood and carried out by all subcontractors and are present in all workshops.

If the business is employing multiple subcontractors, it is expected that all subcontractors are following the same guidelines. In situations where multiple craft types are utilized (i.e. weaving and ceramics), it is conceivable that Nest will be verifying only one specific craft technique. If so, the seal will dictate the specific craft which has been verified for the business. The use of a seal will be approved only after the

Nest is currently reaching a population of more than 67,000 individual artisans spread out across more than 50 countries and representing more than 350 artisan businesses practising very diverse craft types. More than 42 artisan businesses across 5 countries (India, Kenya, Mexico, Philippines, and Peru) have participated in the piloting of Nest Compliance for Homes and Small Workshops, contributing to improved transparency and increased well-being of an estimated 11,000 hand workers.

completion of a qualified assessment.

The industry has come out in support of the initiative. Says **Janhavi Dave, International Coordinator, HomeNet South Asia (HNSA), Ahmedabad**, “In the current scenario when companies are not recognizing homeworkers in their supply chains, the NEST Ethical Compliance Standards for Home and Small Workshops is a welcome move. It does recognize that homeworkers are part of the supply chain and has a well-researched and understood section on wages.” However, Janhavi points out that Nest has not mentioned ‘homeworkers’ in the entire document. ‘Artisans’ and ‘workers working in home workshops’ are the phrases that have been used alternatively for ‘homeworkers’. “The reality is that homeworkers may or may not be

artisans (or skilled workers). Many homeworkers conduct small jobs on garments like cutting threads, stitching buttons, putting drawstrings, etc. Also, most homeworkers work as individual workers from their own homes and not from home workshops," argues Janhavi.

Artisan craft production is cited as a US \$ 34 billion global industry and the ILO cites more than 300 million home-based workers in the world. All major issues from working time to child labour to fair compensation to health and safety concerns form an integral part of the standards and have been developed within the standards. Using its internal assessments as the starting point, Nest carried out comprehensive reviews of existing factory auditing standards including SA 8000, FLA and Fair Trade USA, to build the foundations for the Nest Standards. Nest also consulted with compliance experts as well as numerous artisan business leaders, to further weigh in on the Standards.

HomeNet South Asia (HNSA), as a network of home-based workers across the South Asian region, really appreciates the inclusion of 'legal minimum wages including piece rate wages', 'time motion studies' to determine piece rates again to meet at least the minimum wages, 'striving for payment of living wages' (even though it is only aspirational), 'sub-contractors to uphold company policies', 'inspection of sub-contractors', etc.

While appreciating the initiative as a step in the right direction, it hopes that NEST Ethical Compliance Standards would further work towards a separate compliance standard for homeworkers in supply chain, as a lot of work is being done by homeworkers from their homes and not from workshops. The place of work is the differentiating factor for the compliance standards. Other areas that HNSA is keen to see within the standards are:

- Have a section on social security, which not only meets the local



The purpose of the Nest Standards is to make home and small workshop-based labour for the fashion and home industries (with potential application for broader industry types) visible and safe, in accordance to standards agreed upon across the entire retail industry.

legal requirement, but clearly mentions extension of company-provided social security for all workers, including homeworkers.

- Recognize that many homeworkers in the supply chains are women and have special section on violence against women at the place of work, childcare and maternity benefits.
- A section on skills' upgradation for homeworkers, through CSR activities, which further boosts production.
- Recognition and encouragement of organizing as a tool for reaching out to homeworkers in the supply chains and working towards collaborative solutions.

According to an official release, Nest views these standards as the starting point as these supply chains have such variability and nuance. Nest knows that each level of the supply chain – whether it's the central business, subcontractor, small workshop or homeworker – have their own expectations placed upon them in terms of compliance. It takes participation from all levels to lead to a successful system. Nest also anticipates future additions to this set of standards, both through standards review process as well as through the addition of more robust environmental requirements.

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Has the TUF scheme failed to support growth of textile industry?



Spinning mills with latest technologies are now very common in the Indian Textile Industry

Since its inception in 1999, the Technology Upgradation Fund (TUF) scheme introduced by the Ministry of Textiles has seen many extensions, changes, additions and amendments, yet the scheme envisaged as a vehicle for modernisation and expansion of the textile industry and subsequently the textile value chain, has always been a matter of debate. Despite the existence of such a robust scheme, the latest report on the health of textile mills is discouraging with 682 textile mills shutting down in 2017. Of them, 232 mills were in Tamil Nadu, 85 in Maharashtra, 60 in Uttar Pradesh and as many as 42 such mills were in Haryana. Why the TUF scheme has failed to arrest the decay in the mills sector, is worthy of an analysis.

According to Government records, more than Rs. 21,000 crore has been provided as assistance to the industry during 1999-2015, yet the core issue of mass adoption

of newer technologies, crucial for making the textile industry globally competitive and reducing soaring capital costs, still remains. Many mills are still operating with old machines and even older production methods and a 'slow death' is their inherent fate. On the other hand, companies like Arvind, Trident, Raymond, to name a few, which have invested in new technologies and production methods have been successful in not only remaining relevant in a competitive market, but also taking the leadership position in the textile segment.

While everyone unanimously agrees that though the intent of the scheme is very relevant, the implementation mechanism is cumbersome and prone to delays in payment. The main issue in TUF is the model of disbursement of funds. For example, 5% interest subsidy means, one company after paying this interest to the banks

should get reimbursement from the Government. This leads to multiple complications because of involvements of several banks and many stages of processes. "TUF is useful, but we have to fine-tune the execution part. We have to design a new system like, companies can deduct the subsidy part interest during their payments to banks, and in turn bankers can claim from the Government as reimbursement. This model only will solve all the practical difficulties," reasons **Prabhu Dhamodharan, Convenor, Indian Texpreneurs Federation (ITF), Coimbatore.**

There is enough evidence that TUF implementation at the bank end has had major issues, due to which many players have not received TUF for years and the reconciliation work has still not been completed. It's estimated that about Rs. 6,000 crore is stuck up due to such issues which for many companies is an issue of survival.

“I must commend the Government for having made a beautiful seamless system of payment with no human interface. However, the lack of education in many TUF cells and branches of banks and SME companies has led to many being stuck for years and still not being clear as to how they will get the money. The Government has now finally initiated a reconciliation process, hope the same gets completed fast and companies get their dues,” says **Sanjay Jain, MD, TT Ltd. and Chairman CITI/Textile Sector Council /NITRA.**

Often, we hear from companies that they applied for TUF but got rejected... So where is the gap? “The gap is of not understanding the terms and conditions of the TUF scheme in vogue at the time of application. People assume that old systems are still being followed, while the Government, based on its learnings has been continuously amending things. This communication gap has led to many problems for many people,” shares Jain. Ironically, the very fact that the scheme has been flexible to change with time has been among its biggest problems. Dhamodharan is of the view that changing the policy continuously is also a very important factor for the success of TUF so that one can avoid ‘block out periods’ - kind of situations common in the schemes.

It is interesting to note that among all players of the textile segment, investments in spinning worth Rs. 34,347 crore (in the analyses period 1999-2015) much outpaced investments made in the weaving sector, which was Rs. 9,750 crore (including powerlooms and handlooms) during the period. “Despite its many pain points, TUF has definitely helped the industry grow, especially the spinning sector and large units have benefited immensely from the same,” opines

Jain. However, a mistake many companies in the segment have made is to invest/expand under TUF, without proper groundwork and practical understanding of the industry, especially the new players.

Many overlooked the fact that spinning mills depend on the availability of raw cotton at the right price and that TUF only takes care of financing regarding the fixed assets. The issues of arranging for finance to meet the working capital requirements are still left in the company’s own accord. “Government should only use TUF schemes for value addition in manufacturing and also for modernisation of technology,” argues Dhamodharan, adding, “For spinning expansions, hereafter Central and State Governments should not extend TUF schemes for new projects because already India is facing excess capacity situation in spinning and standalone spinning mills’ EBITDA and margins are shrinking on Y-o-Y basis for the past few years and , it’s difficult for a standalone spinning mill to survive and repay the debts in case of new investments in current trends.”

The future and success of TUF scheme in bringing momentum to the textile industry lies in investments upstream – in garmenting, home furnishing and technical textiles. Understanding this, the Government made major amendments to the scheme in 2016, which are effective, up to March 31, 2022. The introduction of ‘Amended Technology Upgradation Fund Scheme’ (ATUFS) in place of the existing ‘Revised Restructured Technology Upgradation Fund Scheme’ (RR-TUFS), was conceived with a clear intention to make TUF broad-based and include many more areas and enhance the benefits under the new proposed textile policy. ATUFS provide one-time capital subsidy for



While replacing the Revised Restructured Technology Upgradation Fund Scheme (RR-TUFS), the new scheme (ATUF) is implemented across two broad categories. For the sub-sectors of apparel, garment and technical textiles, up to 15% subsidy is provided on capital investment, subject to a ceiling of Rs. 30 crore for entrepreneurs over a period of five years. The remaining sub-sectors are eligible for subsidy at a rate of 10%, subject to a ceiling of Rs. 20 crore on similar lines.

investments in employment- and technology-intensive segments of the textile sector with an aim at promoting exports and import substitution. It is being looked upon as an important tool to drive the Prime Minister's vision of ‘Make in India’.

Textile companies have reacted very positively to the move, but those companies who have already taken subsidies under old schemes feel restricted as they cannot take benefits for new areas like technical textiles. “TUF scheme has been over the years optimally used by the industry, but since CIS (Capital Investment Subsidy) per individual entity is only Rs. 20 to Rs. 30 crore, it is not beneficial to the entire industry as Para 4.1.2 of guidelines state. However, in case the entity has availed subsidy under RRTUFS, it will be eligible only for the balance amount within the overall ceiling fixed for an individual entity. This means that all the units already availing the TUF benefits in previous schemes cannot get the new loans under ATUFS due to exceeds in the CIS cap value,” bemoans **RK Dalmia, President, Century Textiles.**

To get full benefit under the amended scheme, ensure that no rejections happen and funds are made available to deserving companies; besides associations need to play a more active role in educating their members. This is also important in the wake of many states now coming up with aggressive policies, which puts further thrust in expansion and modernisation. “However, for investors looking at state schemes, it is important to first understand the track record of the Government in paying them, otherwise it may get difficult for companies whose viability is based on subsidies,” concludes Jain prudently.

Pakistan hosts conference on ‘Emerging Trends in Knitting’

A two-day international conference on Emerging Trends in Knitting was organized at the National Textile University Faisalabad (NTUF), in Pakistan.

The event that kicked off on February 7, 2018, was aimed to bridge the gap between the researchers and the professionals working in the knitting industry. The conference was attended by various CEOs, machinery manufacturers, Government personages, industrialists and technical experts from the industry.

The conference was also attended by Pakistan Hosiery Manufacturers and Exporters Association (PHMA) Chairman Mian Naeem Ahmad, textile workers and researchers.



At the event, State Minister for Textile Haji Muhammad Akram Ansari assured the industry of bringing in amicable solutions to their problems soon in terms of support from the Government.

Textile, despite being the major source of revenue and employment generation for Pakistan, faces challenges such as declining global market share, reach to new markets, decreasing profits and aggressive

competition in the world market.

Ansari said that events like these can play a vital role in understanding latest innovations and emerging trends in textile knitting which can benefit the industry to a great extent in developing the products accordingly.

Notably, the venue of the conference – Faisalabad, represents around 80 per cent of the entire textile and garment industry in Pakistan. The province is also a home to the office of International Apparel Federation (IAF) which was inaugurated in December last year at Pakistan Readymade Garments Manufacturers and Exporters Association (PRGMEA) building in Sialkot.

Turkmenistan to set up a new textile manufacturing complex

An agreement has been inked between Turkish company Cotam Enterprises Ltd. and the Ministry of Textile Industry of Turkmenistan to set up a new textile complex in the country. Construction work of the complex will kick off from the next month.

The upcoming textile complex is expected to be operational by March 2021. It will be set up in Turkmenistan’s Akhal Velayat (region) and will be equipped with modern textile manufacturing technologies. The upcoming textile unit will produce 3,650 tonnes of

cotton yarn and 1.2 million pieces of readymade garments (RMG). 12 million square metres of high-quality fabric for garments will also be produced at the newly announced textile facility.

Markedly, the setting up of a new textile complex in Turkmenistan

is part of Government’s plan to increase investment in the textile industry of the country to US \$ 2 billion by 2020. The Government intends to upgrade the existing textile and garment manufacturing units and set up the new ones in order to strengthen the industry in Turkmenistan.

The addition of the new textile plant is anticipated to increase the annual export earnings of the country by US \$ 350 million and enable the processing of around 2,30,000 tonnes of cotton per annum.

The Government is even considering improving the surrounding areas of the upcoming textile unit and improving the basic infrastructural amenities. Notably, more than 20 textile manufacturing companies with Turkish associates are already operational in Turkmenistan.



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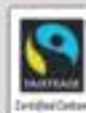
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US buyers seem positive...!

Indicate increase in sourcing of home furnishing from India

The 45th edition of India Handicrafts and Gifts Fair (IHGF) – Delhi Fair Spring 2018 – organized by the Export Promotion Council for Handicrafts (EPCH), as usual witnessed visitation from large number of overseas and domestic buyers, top retailers and buying agents. Many of them were keen to explore home furnishing products (soft goods) put on display by nearly 480 Indian home furnishing exporters. *Apparel Online* met some of the interesting buyers at the fair and discussed the business scenario, their strategy, future plans and allied aspects of sourcing home fashion products from India. It is a good sign for India that US-based wholesalers/importers seem positive about their business and they are looking to increase home furnishing sourcing from India.

With regard to US-based buyers, the good thing is that new companies are now exploring India and many of them were happy with the overall offerings that they found at the fair. Established importers too are adding new product categories. Some of the product categories are coming back to Indian market and few others are doing well. For example, medium and high-end market segment is coming back to India for more luxury items, organic-based products. Buyers are very optimistic about India, and specially in comparison to China. Few buyers also say that Indian exporters' ways of approaching customers is definitely much better than that of the Chinese, and this is a positive way to get more business.

It has been widely reported in recent times that Chinese companies have increased their focus on product development, designs which is another issue for Indians. However, many buyers do not agree to the same, though experts feel that in some product categories like table tops, China has grabbed a big share of India.

Dealing with a large variety of different kinds of soft and hard goods, **Boston International, Massachusetts**, a distribution company started sourcing home furnishing product, from India just a year and half ago. The company also explored China for the same as it has strong know-how of China and has been sourcing from there. But a top official (names have not been shared on buyers' request) of the company found India more interesting in few aspects. "Our customers expect

a lot of variety from us which is a challenge. Chinese are not good in Americanised art, so in China we were not getting variety of artwork and detailing that could keep our customers interested, so we explored India for textiles and right from the start, Indian designs did very well for us. Printing and overall quality in Indian products is very good and consistent," she informed, adding that in shade variation also, India is better than China, as they do not find this problem in India. For a year, her team keenly observed customers' response to Indian products and finally they decided to visit India and work more deeply with Indian companies.



Growth: Boston International, Massachusetts which grew by 12 per cent last year, is expecting similar growth (10 to 12 per cent) this year too. India's Heritage is also doing well and the current year also looks good for them. The company's business has grown consistently year-on-year.



Top representative from Retail Strategy



Senior team of Boston International



Deven Saxena (L) MD, Charu Merchandising with Lokesh Parashar of Buying Agents Association

Currently the company is sourcing kitchen and table linen from India and in a year, it has sourced more than US \$ 1,00,000 worth of products and is expecting 40 to 50 per cent growth in the same. She is of the view that delivery timing is the only issue where Indian exporters need to improve a little.

There are some other buyers who are still banking on India's differential strength, yet are spreading their sourcing into other countries to add more value in their offering. However, their first priority is still India and they too are looking at increasing their sourcing from India. **India's Heritage, New Jersey** working for almost 20 years in India, is properly utilizing the strengths of most Indian hubs and is trying to expose these strengths to various international clients of the US market. "We do products that are traditional, transitional, contemporary, and



As product development is the key, many exporters have increased their thrust on the same, but they are moving ahead with balanced approach. **Vijay Thukral, Director**, (third generation of family business), **Ramesh Impex, Ghaziabad** shared: "In last three years, Europe has been consistent. To cope up with this condition, we are focusing more on design development. But the idea is to keep balance and not to try too much, as we should have enough time to concentrate on the business which we are doing right now. No matter how creative and advanced one is, China is very good at copying." The company, working mainly with European market and offering good range of home furnishing products, has hired designers, is involved more in research and is applying more and more value addition techniques as a growth strategy.



Senior official of India's Heritage

of mid-century... For that we source from Jaipur, Delhi, Mumbai, Bangalore, Kolkata and Kashmir," shared a senior-most official of the company. India's Heritage will continue to grow sourcing from India as it consistently works to add new categories to expand its product lines and is also witnessing an increase in demand for the existing product categories. "We focus a lot on how we can offer different kinds of looks in our product lines. A year ago, we started sourcing throws from India, which proved a good business for the company," says the official. To serve its client better, he offered a package (box of products) to the retailers which are difficult for them to source individually. This strategy has been very successful for the company. Two years ago, India's Heritage started sourcing bedding from Europe as it had too much mix of India and wanted to break the

monotony. "Sourcing from Europe helped us to be trendier rather than being very traditional. We got a good mix of fabric from there," he added. Dedicated purely to home furnishing products, the company is having warehouse at New Jersey from where it caters to various chain stores, furniture stores of North America and South America. As far as overall working of Indian exporters is concerned, these buyers are relatively happy as he feels that there has been a lot of improvement over the years as exporters are now more professional and are travelling more which is helping them to understand international markets, trends etc. With regard to further areas of improvement, he feels that communication and shade difference are the issues where Indian companies can improve further.

On similar lines, international experts also insist that Indian exporters need to study their perspective clients or customers more deeply. Working with India from last 25 years, **Head of Retail Strategy, Israel**, says, "It is very important for the supplier to minutely understand culture, lifestyle and overall study of the customers. And I am helping them in the same." she is supporting the industry by her expert consultancy service on product development and sourcing, to the Indian companies. "Not everyone is open to new ideas, and more research is a problem with many Indian exporters, but sooner or later they have to change this mindset as even within a city, buyers of similar products are quite different," she reasoned.



There are some other buyers still banking on India's differential strength yet spreading their sourcing into other countries to add more value in their offering. However, their first priority is still India and they too are looking at increasing their sourcing from India.

It has been widely reported in recent times that Chinese companies have increased their focus on product development, designs which is another issue for Indians. However, many buyers do not agree to the same, though experts feel that in some product categories like table tops, China has grabbed a big share of India.

Regarding market opportunities, she is of the opinion that apart from US, there is ample opportunity for Indian companies in Israel, especially in product categories like bedding and towels. It is a good market as people frequently change their home décor and per capita income is also high compared to many other countries. But being a small market, competition is very high, so one has to be very careful about pricing.

With positivity in the US, some Indian buying agencies are also gearing up to get more orders of home furnishing products, especially as in recent years they missed this segment. They are even adding new strategies to achieve this goal. For example, Delhi-based Charu Merchandising is now expecting that home furnishing business should come back as focus is more in that direction, currently. The company is trying to push regular items like bath towels, bath mates, sheeting, pillow covers in textile business as these are big volume business.

"China is 'killing' us, as people are going for cheaper kinds of stuff like micro fibres; so we are trying to work more on our product line. Our major market is the US and we are exploring new clients in the market. We are trying to add more accounts as it is time to work with more importers as importer's business gives bigger horizon of getting into stores. We are still working with one to one stores like Dollar Tree, Family Dollar, but through importers we get access to lot of other stores," says **Deven Saxena, MD, Charu Merchandising**, who is working with lot of discounters in US.



INDIA'S FASHION AFFAIR WITH THE GULF

In recent seasons, Indian Fashion Weeks have seen increased business response from the buyer's front with more and more countries embracing and demanding Indian-made designer wear.

In our latest expedition to Lakmé Fashion Week, Summer/Resort '18, we interacted with a few renowned buyers based in the booming Middle East in order to understand the fast evolving Islamic consumer. In a time where the concept of seasons seems to be fading away, we found ourselves amongst a sea of traditional Indian techniques intermingled with modern aesthetics.

Multi-brand retailers are looking for designers who can collaborate to create collections that are streamlined for their consumer. Similar demographics in terms of cultural, political and economic conditions give rise to a market that has great potential.

Owing to its world-renowned craftsmanship, attention to detail and luxe materials, India is emerging as a red-hot hub for luxury retailers globally.

FROM LIBERATION TO LUXURY

Fashion finds its Mecca in the Middle East

In a recent 'Thomson Reuters State of the Global Islamic Economy Report', Muslim consumers spending on apparel topped US \$ 243 billion in 2015, with an expected increase to over US \$ 368 billion by 2021. Also significant is the findings of the Pew Research Center, according to which Muslims are the fastest growing religious group in the world, estimated to increase the population of designers by 70 per cent in the next 40 years.

As a result, brands are increasingly recognizing the huge scale of opportunity that could stem from better connecting with such a prosperous consumer segment. But as is the case, while studying any other country or region – nationality, age, economic structure, culture and educational levels – all play an essential role in understanding how this market behaves.

Age and location make a big difference when it comes to clothing in the Middle East, the largest region of concentration for the Muslim community. The way a certain set of people dress reveal not only their personality, but also the region and social class they belong to. Today, in the Middle East, local traditions and Western fashion mix together to pave way for a new market which designers and brands are now eyeing with interest.

When comparing the variables of age, economic class, and education, not all Muslim consumers have the same spending habits or fashion preferences. Millennials and Gen Z consumers in the region are increasingly tilting more towards westernized clothing concepts, reserving more traditional styles for ceremonial and religious occasions, while the older generations continue to be embracing more of traditional garments.



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TODAY IN THE MIDDLE EAST
LOCAL TRADITIONS AND
WESTERN FASHION MIX
TOGETHER TO PAVE WAY FOR
A NEW MARKET.
”



The Islamic population is experimenting with westernized fashion concepts



Multi-brand retailer BASICS' store in Jeddah

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IT IS A STEREOTYPE THAT ALL MUSLIM WOMEN WEAR A *HIJAB*.

WITH A BOOST IN AWARENESS AND EDUCATION, MANY FAMILIES ARE EMBRACING UNCONVENTIONALITY.

”



International designers are expanding into the modest wear segment

Within the region itself, from Morocco to Oman, the concepts of modest dressing and traditional garments change from one country to another and the clothing is also hugely dictated by the climatic conditions prevalent in that area. Many women in Lebanon do not cover their head, but majority of women in Saudi Arabia still have to wear a *niqab*. People living in the cities are more attentive to the latest fashion trends, while those in smaller towns and rural areas are still conservative, following traditional norms.

It is also a stereotype that all Arab women wear *hijab*. With increased awareness, emphasis on education and the blurring boundaries between cultures owing to easier travel, many Muslim families are embracing unconventionality. Recently, Sheikh Abdullah al-Mutlaq, who is a member of the Council of Senior Scholars, and also a senior member of the top Muslim clerical body in Saudi Arabia, stated that women need not wear the loose-fitting, full-length robes symbolic of the Muslim faith known as the *abaya*.

Some Muslim countries have followed Western footsteps in terms of fashion, namely Lebanon, Dubai, Jerusalem and Jordan. In Lebanon, women have little in common with the fashion preferences of Muslim

populations based in Saudi Arabia and UAE. The mindset is very open to experimentation and westernized fashion concepts. Women prefer more revealing clothing with shorter hemlines and longer necklines. In countries like Saudi Arabia, Kuwait, Bahrain, Qatar, Oman, and Yemen, the emphasis is more on the traditional dress.

The younger cohort (people under the age of 30) in the UAE, Saudi or Qatar makes up more than half of their entire population. There are some 350 million people in these countries who are still below 26. While a bigger purchasing power unquestionably lies with the older generation and indulgence in shopping is a common thread throughout.

On the luxury side of the UAE market, with the country boasting of a wealthy consumer base in terms of GDP per capita, and where Dubai and Abu Dhabi alone touch US \$ 43,605 and US \$ 71,580 respectively, the opportunities are huge.

Mainstream international brands have started to expand their clothing lines into the Modest Fashion segment, launching across the Middle East and also stocking Modest Fashion products in western markets. Brands such



as Dolce and Gabbana, Burberry, Nike, and Uniqlo have introduced exclusive Modest Fashion ranges.

There has also been a spike in Muslim designers at International Fashion Weeks, and all this when put together, signals the dawn of a new era in fashion which is set to challenge the conventional norms set by society over ages of oppression, and signals the advent of modest dressing.

The current retail climate and shopping experience is fundamental to the lifestyle and spending habits in the Middle Eastern market which enjoys a greater rate of disposable income. In such a scenario, the touch and feel of a product has become vital, giving rise to many multi-brand fashion retailers as well as individual designer stores.

Changes are also afoot to garner international recognition towards home-grown designers, in order to promote the design talent prevalent in these countries.

Observing the success enjoyed by designers such as Elie Saab, Zuhair Murad and Rami Al Ali, who initiated their careers from the Middle East, there has been a growing emphasis on nurturing and developing younger designers, which Middle Eastern retailers have been taking an active interest in developing.

THE SUCCESS FORMULA OF RETAIL IN THE MIDDLE EAST

There are no two opinions regarding the power of Middle East's fashion consumer. Global travel and social media has made them hyper-aware of global trends in the far flung corners of the world.

But beyond that it is a group of people who treat leisure spending as an integral part of their culture and thus, their retail spots and shopping complexes are a marvellous place of social gatherings in itself. The joy of experiencing retail in the Middle East can teach a lot to the West where brick and mortar is going through a major period of renaissance.

To find out the recipe behind this luxury retail success, *Apparel Online* chats with buyers from some of the biggest stores in the region on how they entice shoppers to make big pocket in-store purchases.

While it is easy to club all the Middle Eastern countries together as a group,

there are several differences. Though it is hard to demarcate an atypical aesthetic, the Arab people are all manically fast in adopting the latest fads and fashion trends.

“What you see in Italy, you see in Lebanon. Maybe even faster than you can imagine. Everyone is a dedicated follower of fashion,” shares **Wissam Shamy of AĪSHTI**, a Lebanese luxury department store chain.

While modest fashion is a norm with most of them, they do not just indulge in conservative clothes like the mainstream media will have you believe... Gone are the days of long, loose robes decked in hand embroidery. Women in Lebanon love



Lebanon-based luxury retailer AĪSHTI's sea-facing store is the biggest in the country



Experiential Retail: Emilio Pucci unveils new bikini collection in Beirut



Moncler's lavish standalone store interiors in Abu Dhabi



Pucci Bikini Bar at AĪSHTI By The Sea



Luxury store Hera in Hawally, Kuwait

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JOY OF EXPERIENTIAL
RETAIL IN THE GULF
CAN TEACH A LOT TO
THE WEST

”

plunging necklines, mini-skirts, body hugging short dresses. For the girls of Kuwait, where wearing your *hijab* and *abaya* is still commonplace, trend-led modest fashion is now the biggest rage.

Big name international brands are most easily found in the fashion stores here. AĪSHTI stocks the likes of Gucci, Saint Laurent, Dior, Valentino, Burberry, Chloé, among countless others at a sprawling six-floor boutique in Downtown Beirut.

The company owns 36 single brand stores in Lebanon, making it the biggest in the country. They also have stores in Bahrain, Abu Dhabi and Jordan. But curating the collections for each country requires a more wholesome understanding of the local market, explains Shamy, adding, “I always pick classic colours for Lebanon – black, white, navy blue, grey, maybe dark reds. We are looking for a simple dress that looks sexy on woman.”

So while picking through a designer’s collection for their stores in Kuwait or Abu Dhabi, they will go for more fun colours and the styles might become more long hemmed, long sleeves and just covered up in general.

Bright colours and innovative fabrics in general are a major winner in diffident Kuwait. **Mazin Jawich of United Global Original** adds, “With the hot and humid weathers in Kuwait and Saudi, customers are always looking for cool fabrics. They not only want comfort and functionality, but also need to look luxurious.” The buyer will often pick up a style or technique and ask designers to recreate them in lighter materials.

Barring some cultures like Lebanon, fashion however still has a very conservative bent and if you notice closely, modesty has become a major global fashion trend unto itself.

INDIA CRACKS THE MODEST FASHION MYTH



Nasrah Hussain Mukhtar, a partner at **Collage Dubai** informed our team that she is working on a modest fashion event that will bring designers from different countries together as an exclusive collaboration for her store.

Dina A. Sammakieh, Founder of I Love Hishma, based in Jeddah says: “My store sells everything in modest fashion but on a trendy level. However, I have noticed that people now have an appreciation for the young independent designers starting on their own. They are open to more creativity and brands that may not be so popular but are taking risks with new concepts.”

The quest for newness and exclusive items is huge in the Middle East at the moment. **Wafaa Al-Ghalayini, Founder of Basics**, a 25 years old boutique that sells Haute Couture and RTW, also in Jeddah, corroborates the same point saying, “The cities in Saudi are very small and often social circles overlap so customers are very careful about not buying the same outfit as someone else in their circle.” Hence, buyers often seek out designers who are open to making changes.

With so much competition within the region, creating grand experiences is also a major aspect of retail in the Middle East. **Tareq Srour Malah, CEO of TM Fashion Group** which operates 8 multi-brand luxury stores in Kuwait and Turkey says that their shops hold a trunk show or some sort of consumer-facing event every 2 months in collaboration with their designers. And apart from their main boutique, they also have a special customization office where clients can come and design their own outfits with the help of designers and receive the final pieces in just a month.

Similarly, **AÏSHTI's** main boutique has facilities like a luxury spa, salon and gym as well as an exclusive restaurant which is headed by a French chef. The company also publishes its own magazines which retail directly from news stands like any other typical monthly.

Middle East is a mushrooming market with a breadth of opportunities. It comes with its own implications and differences but with its mammoth purchasing power and keen interest in fashion, it is not one that can be ignored.

For ages, Western modernism and Islamic conservatism have waged war on the topic of fashion liberalization and how it addresses the Muslim community globally. More recently though, the fashion and style sensibilities in this region have been undergoing a renaissance, with an increased number of consumers embracing, and designers providing for more unorthodox ways of dressing.

In our latest expedition to **Lakmé Fashion Week Summer Resort 2018**, we had the opportunity to interact with a few renowned buyers based out of the Middle East in order to understand the fast evolving Islamic market and their expectation from Indian designers.

There are various reasons that can be attributed to the rise of fashion's acceptance in the Middle East. This can mean a lot of great things for the Indian fashion industry which

shares several cultural values with the region. Perhaps it would not be wrong to say that no other country can understand the Middle East like we can.

The current retail climate and shopping experience is fundamental to the lifestyle and spending habits in the Middle Eastern market which enjoys a greater rate of disposable income. In such a scenario, the touch and feel of a product has become vital, giving rise to many multi-brand fashion retailers as well as individual designer stores.

Gone are the days when it was expected of a woman to don herself in a façade that revealed only her eyes, urging many designers to move away from the all-covered clothing trend.

Speaking of their experience from **Lakmé Fashion Week** in Mumbai, buyers loved the fabrics and handwork on display, but there was

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RETAILER-
DESIGNER
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”

a general discontentment with the trend-alooof quality prevalent across most of the collections.

Retailer-designer collaborations are an upcoming and trending concept in the world of luxury fashion retail. As most retailers revel in loyal customer relations built overtime, a new market has emerged wherein retailers customize collections specific to their client base.

Such collections are exclusive only to the retailer and are made in partnership with designers and brands keeping in mind the kind of styles and details that perform well for the concerned retailer.

A major aspect of this success is collaboration and customized limited edition products. Exclusivity is vital and thus, buyers constantly work out alterations like adding sleeves, colour changes, dropping hemlines and so on. Young designers can keep this in mind and design their specification sheets accordingly with pre-disposed workaround options that address different markets. Translating design concepts to commercially viable retail options and being aware of the global trends is important to win buyers.

Mazin Jawich, Founder of U.G.O, Kuwait, explained saying, “The rise of experiential retail has got us embracing in-store promotional events such as fashion shows and trunk shows every two

months. We invite designers to promote their collections, and to interact with our clientele to create custom-made pieces.”

AİSHTI, a Lebanon-based multi-brand luxury retailer that houses the likes of Gucci, Marc Jacobs, Saint Laurent, Valentino, and Armani among 35+ other mono brands that cater to the fashion segments in the Muslim world, now enjoys its presence across Lebanon, Bahrain, Abu Dhabi, Jordan and Dubai.

Wissam Shamy, the Facility Coordinator at AİSHTI says: “Fashion that you see in Italy is also seen in Lebanon... The modern day woman is open to change and has the confidence to carry off sensual styles that compliment her... This understanding of different customers is crucial for success.”

Because there are disparities within the region itself with places like Lebanon opting for more revealing styles, whereas places such as Kuwait and Saudi Arabia are still in the process of leaving conservative clothing behind, not one formula works for the whole region.

In Lebanon, for instance, the market finds it difficult to carry off typical and traditional Indian clothing with the inclination tilting towards more Indo-western and European styles. The buyers from this region were impressed with the material quality but had a lot of alterations to suggest in terms of cuts, fits going tighter



BASICS in Jeddah offers a contemporaneous take on luxury fashion

and lengths going shorter. The colour palette working for this market is one comprising of sky blues, navys, greys, blacks, whites and reds.

Saudi Arabia-based retailers such as ‘I Love Hishma’, found the colours, fabrics and silhouettes offered by Indian designers at Lakmé Fashion Week to be in accordance with their brand ideology. Since these areas are dominated by modest fashion clothing, the buyers opted for hand-dyed silks and khadi to be introduced as new trends in their market.

A couple of new buyers at LFW mentioned that there was a lack of consistency/parameters in how different designers were charging for their assortments. The merchandising methods seemed casually placed and they found some pieces to be over-priced and at times, equivalent to what they pay global luxury players. This, they feel, is unjustified given the experience and goodwill the latter holds in the industry.

Indian designers offering handcrafted pieces that are rich in embroidery or embellishments have high price tags attached to their garments which doesn’t ring well for the Middle Eastern consumer who prioritize comfort and functionality over opulence.

Mazin Jawich of United Global Original advised: “Smaller and lesser known designers need to keep their



Designers like Ridhi Mehra and Amrich emerge as buyer favorites at Lakme Fashion Week S/R'18



Jacquemus to launch men's line at next Paris Fashion Week

Simon Porte Jacquemus, the young designer/founder of his label Jacquemus, has announced his foray into menswear. His first collection will be unveiled at Paris Fashion Week in June this year. Jacquemus had been teasing this fashion announcement using the hashtag '#newjob' on all his social media posts for weeks. Unsurprisingly, the industry was buzzing with speculations – is the new job a collaboration, a new fashion house? Since there are quite a few open creative director posts, many thought that he might be heading to Céline or Courrèges or even Versace. But all the rumours were put to rest when Jacquemus concluded his Fall/Winter 2018 show wearing a beige hoodie that said 'NEW JOB L'HOMME JACQUEMUS'.



valuation in check when exploring new territory. It is not enough to only like the style; they have to be able to sell it at the end of the day.”

Most designers found designer **Ridhi Mehra's** aesthetic to be at par with their market demands. Mehra has garnered recognition for her skill at blending Indian and European influences together to create chic and flattering silhouettes for the modern woman.

Another designer who has been complimented for being at par with Middle-Eastern sensibilities is **Mohammed Mazhar** who featured under the GenNext category and is an emerging young designer. Mazhar, with his kurtas made using mulmul cotton, cambrie and lawn fabrics, scattered with handcrafted *bhalwa* prints and mocha embroidery, perfectly fell in line with his pricing, colour combinations and fabrics.

Buyers are increasingly appreciating designers who are willing to develop collections according to their market and clientele and India is a red-hot hub for luxury retailers globally. With adequate information on how to deliver competitive pricing, flexible customisations and an international mindset towards trends, Indian brands and designers are sure to flourish in years to come.

Lacoste updates its iconic crocodile logo with 10 endangered species

French polo T-shirt brand Lacoste is replacing its iconoclastic crocodile logo with newly minted logos of 10 critically endangered species for a limited edition range of T-shirts. This is the first time in Lacoste's history of 85 years that Lacoste will play with its logo. Aply titled 'Save Our Species', the initiative is in partnership with the International Union for Conservation of Nature. A range of only 1,775 T-shirts, it was launched at the ongoing Paris Fashion Week and is now being sold on a microsite on its French website. The number of T-shirts in each logo series tallies the remaining population of the given species in the wild.



JCPenney launching new tween-targeted brand 'Obsess'

JCPenney is launching an exclusive tween collection – Obsess. This new line of clothing features rotating capsules inspired by young women, promoting the cause of a positive body image. The brand will launch its first collection in collaboration with Olympic gold medalist Laurie Hernandez, who will showcase chic rompers, dresses, jeans, curated specifically to grace all body types.

The collection is the first under the larger Obsess brand, which was highly influenced by the voice and style of Gen Z. Notably, Gen Z holds US \$ 44 billion in buying power and is poised to become the largest consumer segment. Obsess is available in sizes 7 to 20, including plus range. The line was launched online at JCPenney.com, on February 26 and on March 2 at 500 JCPenney stores.



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Renu Creation adds new unit; enters into exports



Nitesh Jain, Director, Renu Creation

Ludhiana-based Renu Creation, specializing in kidswear (woollen items), has now also started manufacturing ladies' garments at a new unit. The company, incorporated in 1994, is ISO 9001:2015 certified and is now looking at options to enter into the export market. To expand its capacities, Renu Creation will install some new knitting machines and nearly 100 stitching machines. For export, the company is offering sweaters, tees and lowers. Currently, its total capacity is nearly 3,000 pieces per day.



Renu Creation specializes in kidswear

“We always had the vision to get into export, reason being this sector is more organized. We have worked hard to improve our quality, so whatever thought-process we have while making a garment, is quite as per export terms. Secondly, domestic market has a saturation point as we can't expand there after reaching a certain level. We already have a strong base of more than 500 clients in domestic market across India and it is very hard to further expand the same, so we want to explore export,” said **Nitesh Jain, Director** of the company.

Increased capacity and comfort in catering to small orders will also help the company grow in terms of exports. Nitesh is focusing on a market that favours winter season, with little relevance on the size of orders. As the company commenced on its participation in an international sourcing event, it received a feedback for usage of cotton and wool blend. The company is continuously adding new items in its product basket. For example, earlier its core strengths were skivvies and leggings, but later saw an addition of cotton pullovers and fine knit products.

A journey from worker to owner...; Rs. 25 crore turnover in 3 years

Swaran Singh, Owner and 'Teacher', Pearl Apparel Inc., Noida is perhaps the only example in the Indian garment industry where a person who began his career as a worker, did his technical consultancy with top companies and now stands as an entrepreneur, proudly running his successful export house. Happy with his exciting journey of 25 years, Swaran Singh's 2½ year-old-company currently holds a turnover of Rs. 18 crore and is expected to reach Rs. 25 crore in current fiscal. The factory which was earlier in 18,000 sq. feet area now has a sum total area of 31,000 sq. feet. The company is more in business with buyers based in UK, while some are also from Germany and France.

In discussion with *Apparel Online*, he shared some of his initiatives: “As I started my career as a thread cutter..., then later worked as a pattern master and so on, I know most of the processes in garmenting

minutely. Whatever I did during my consultancy at various factories, I implemented all those initiatives in my own factory. To mention a few, for energy saving and contributing to environment, we installed LED lights and are using gas rather than diesel for most of the purposes. Waste management was on target since day one through our usage of Toyota principles.”

Swaran Singh strongly feels that in the garment industry, if one does not have humble approach with workers and staff, it is a very difficult task to manage. “We have to take them along. Mindset of an 'Owner', 'GM' attitude will not work. I don't have such designations or posts in my unit. I myself work as a teacher; I pick my staff from lower level, train them and get the job done from them,” he added.



Mindset of an 'Owner', 'GM' attitude will not work. I don't have such designations or posts in my unit. I myself work as a teacher. I pick my staff from lower level, train them and get the job done from them.



Swaran Singh, Owner and 'Teacher', Pearl Apparel Inc.

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'SADH' - A GROWING COMMUNITY IN THE TEXTILE BUSINESS

Irrespective of cast and community, one must appreciate the Sadh community due to its growing footprints into accessories, home furnishing and apparel export. In Delhi-NCR alone, there are nearly 500 Sadh businessmen who are in the textile business and 70 per cent of them are into scarves and accessories manufacturing. A good number of Sadhs (more than 200 firms) are also present in Surat and Erode. They are said to be involved mainly in textile business, wherever they exist. Most of them originally belong to Farrukhabad (Uttar Pradesh) and some of them still have some set-up there.

Old generations of the Sadh community were basically experts in craft, block printing and possessed a deep knowledge of the dyeing process. Fabric was the strength of the community as they knew the intricacies associated with it from a grassroots level. Some of them came to Delhi and Noida and also tried to start their own exports while working as printing job workers for exporters.

"It was during 1995-96 when Surat started its domination in value addition and bulk business, due to which the printing business of Farrukhabad faced pressure. When some of the printing experts took a plunge and achieved success in export business, many others started moving away from Farrukhabad and slowly established themselves in other parts of the country," shared **Desh Deepak Sadh, Selfi Wear, Delhi/Sadh Sons, Farrukhabad**. He moved from Farrukhabad to Delhi in 1996 and is now offering a good variety of stoles, scarves and shawls.

Lack of proper education was a hurdle faced by many of these Sadh businessmen in the early days, but despite that, their hard work paid off. Some of them learned business from domestic sectors and settled for the same. However, majority of them are into exports or are catering to both markets. Lack of amenities and basic infrastructure in Farrukhabad pushed them to move their base to Delhi and Noida. Other specific reasons associated with the growing expansion of this community into textile business is that, the community does not like to do a 9-to-5 job and their passion for becoming entrepreneurs is very high. They live by the norms of supporting each other



Desh Deepak Sadh, Selfi Wear, Delhi/Sadh Sons, Farrukhabad



Sandeep Sadh, Saar International Exports, Noida



Ayan (L) and Sanya Sadh of Ayan Collection

and focus on growth, rather than leg pulling and the likes. The same is applied to their involvement into export business, which is reflected in the growth witnessed over a period of time. "Whoever joined the business later learned quickly and explored many more opportunities rather than creating competition for the existing ones," added Desh Deepak Sadh.

In Delhi-NCR, major chunk of this community has been into scarves manufacturing from the beginning and even today, most of them are inclined in the same direction. One of the main reasons for this is the ease involved in the process of making scarves and requirement of less resources (compared to garment manufacturing). Since the second generation (mostly entered into business after 2005) is well involved in this business, some of them put an addition of home furnishing and apparel to their product offerings.

Saar International Exports, Noida is another company that



In Delhi-NCR, major chunk of this community has been into scarves manufacturing from the beginning; and even today, most of them are inclined in the same direction. One of the main reasons for this is the ease involved in the process of making scarves and requirement of less resources (compared to garment manufacturing).

has its roots in Farrukhabad. The company added garmenting a few years back as only having an accessories business (scarves, bags) did not prove as fruitful because of increased competition. **Sandeep Sadh, Director** of the family-run company who is in this business for more than 20 years and who started exports 10 years ago shared, "We left Farrukhabad because it was not easy to grow in exports from there. Most of the Sadh community are based in Delhi and just 20 per cent are still in Farrukhabad. There is no significant textile business left there," added Sandeep.

Ayan Sadh of **Ayan Collection**, a younger generation member of the community representing his family business adds, "Our community is into this business from a long time and we are carrying forward the same." The company has its unit in Export Promotion Industrial Park (EPIP), Greater Noida.



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AEPC Celebrates 40th Foundation Day

“Benefits to industry should be in proportion to its capabilities to generate employment”

- Amitabh Kant, CEO, NITI Aayog



(L to R) Sudhir Sekhri, Amitabh Kant, H.K.L. Magu and V. Anil Kumar Vasu Pillai on the dais at the Foundation Day celebration

In a proactive move to motivate staff and reiterate the importance of the council, AEPC celebrated its 40th Foundation Day at its headquarters in Gurgaon. The occasion was made special by the presence of **Amitabh Kant, CEO, NITI Aayog**, who has in the past always spoken in support of the apparel industry and the need to look at the industry differently from other industries, mainly for its huge employment generation capabilities. At the inaugural session, Kant again re-enforced his support and even urged the Government to ‘compromise’ on other industries if need be to ensure that the FTA with the European Union is finalised this year.

Though, the exporters from across the country gave the celebration a skip, EC members and some showroom holders of Apparel House were present on the occasion. Lauding the infrastructure of the Apparel House, Kant pointed out that it is the biggest and most beautiful office among the numerous export

councils and efforts needed to be made to create a buzz of activity at the venue to complement the structure. Reacting to the suggestion, AEPC Chairman HKL Magu shared that this agenda was among the priorities for his tenure.

Tracing the history of AEPC, Magu, said that the industry had gone through many ups and downs and AEPC has always kept pace with the changing needs from a quota monitoring body to an association which worked alongside exporters, not only to promote exports, but also to update the ministry on issues of concern. “As India is gearing up to move towards WTO-compatible, production-based subsidies from export-based subsidies, it becomes extremely important that we position India strongly as a responsible sourcing destination,” said Magu, imploring the Government to give the much needed support to the community as it is facing one of its worst fund crises ever.



There has been a reduction in the benefits to the industry post-GST roll out and we are looking at ways to bring it at par with the rates prevalent in the previous regime.

- Amitabh Kant

The cheers went up when Amitabh Kant clearly seconded the opinion that garment exporters needed immediate steps to get them out of the current deadlock. He agreed that long-term policies to make the industry competitive could follow, but at the immediate phase to create positive signs, it is important to resolve the issues, like blocked taxes and refund of GST, and exchange rate-related concerns to bring back the apparel export and manufacturing sector on a growth path from consistent by declining trends. “There has been a reduction in the benefits to the industry post-GST roll out and we are looking at ways through which we could bring it at par with the rates prevalent in the previous regime. For the benefit of the Industry, Central and State levies should be refunded and Government should work with the industry to resolve this issue,” said Kant.

With a strong membership base that exceeds 8,300 members, AEPC is considered one of the most influential councils for export development and promotional activities. Over the last few years, the council has been under fire for not discharging its role in a free and fair manner. Many RTIs have been filed against the Council and change has been initiated with the Council EC membership's voting now conducted through EVS. The industry at large still looks upto the Council for leadership and guidance and it is now for the Council to win back the confidence of those section of exporters who feel that the AEPC is only watching the interest of large exporters while a majority of the members are left to fend for themselves.

Telangana may get small- and medium-scale textile park soon

A small- and medium-scale textile park is likely to come up in Telangana soon. This has been proposed by Telangana State Industrial Infrastructure Corporation (TSIIC). The under consideration park is likely to be housed at Pendyala village of Janagaon District.

The move is aimed to boost the textile industry in the state including the Micro, Small and Medium Enterprises (MSMEs). The establishment of such a facility will encourage reverse migration of weavers from textile manufacturing hubs such as Surat, Bhiwandi and Solapur to their home state.

At the meeting, the textile entrepreneurs were assured of land allotment and were asked to increase the production of home



textile products such as bedsheets and home linen, like Solapur.

Additionally, special subsidies and incentives are likely to be announced for the textile parks and clusters spread over 50-100 acres of land, announced Corporation Chairman Gyadari Balamallu at a

meeting with the textile industry stakeholders recently.

Balamallu also revealed that the Government is mulling to offer residential facility within the premise to accommodate workers at these units in the vicinity to save time.

Further, the TSIIC Chairman revealed that the mega textile park at Kakatiya, to be set up at a cost of Rs. 11,000 crore under a public-private partnership, would be open to expansion based on the demand from the textile industry.



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India's textile export industry gets a leg up with RoSL budget hike

The Government of India has marked up the Budget 2018 allocation for 'Remission of State Levies' (RoSL) scheme to Rs. 2,163.85 crore from Rs. 1,555 crore – a 39 per cent increase over FY 2017-18.

The increase in RoSL alongside a Rs. 6,000-crore package declared for the apparel and textile industry in 2016 would give a fillip to textile exports from the country, said Union Textile Minister Smriti Irani. Around Rs. 1,800 crore have already been provided to the industry as part of the package, while a payment of Rs. 300 crore is envisaged for the current fiscal, as she said.

The Minister further stated that the Technology Upgradation Fund Scheme (TUFS) outlay in the budget has also been hiked by 15 per cent. Noticeably, the RoSL scheme is a major constituent of the aforementioned package that enables the exporters to offset indirect taxes charged by the states that are incorporated in exports. Importantly, the textile exporters can claim RoSL on top of duty drawbacks and additional incentives.

Apparel Online spoke to some of the key exporters to garner their reaction on the developments and discuss other related issues as well.

Lauding the Ministry of Textiles (MoT), Gurgaon headquartered Matrix Clothing's Managing Director Gautam Nair said, "The hike in RoSL funds in Budget 2018 will go a long way in easing the pressure off the exporters, especially the smaller ones who make up 90 per cent of our business."

There was under-allocation of RoSL funds in the last year's budget which resulted in the non-payment of refund claims. A lot of exporters have been facing financial stringency due to locked-up funds and there is a need to expedite the disbursement of RoSL benefits, he further added.



Expressing his delight on the move, Ludhiana-based NG Apparels' Marketing Director Arppiit Guptaa stated that it's heartening to see the Government stepping up its support to bolster apparel exports.

"The sector is currently undergoing difficult times and the increment in RoSL funds will positively impact the entire value chain and will help grow India's share in global apparel exports, which currently is 1/5th of China," he feels. However, Guptaa also expressed his concern over the dwindling fortunes of apparel industry of Ludhiana, one of India's largest manufacturing hubs.

While counting factors like rising wages, diminishing margins, unpredictable weather, etc., responsible for the decline, he opines that increase in RoSL rates would definitely give some push to the sector to endure this difficult phase.

On the other hand, Nair at Matrix Clothing rues that there is no provision for the increase in RoSL rates in this year's budget. He notified that there was a 3-month transition period in 2017 wherein the old rates were applicable from July to September and new rates came in October. "The rates, in fact, have come down by almost half (1.75%) of what was earlier



"There was under-allocation of RoSL funds in the last year's budget which resulted in the non-payment of refund claims. A lot of exporters have been facing financial stringency due to locked-up funds and there is a need to expedite the disbursement of RoSL benefits."

– Gautam Nair

(3.5%). We have been pleading the Government that this has seriously affected the apparel industry," he tells. Apropos the apparel exports figures for September-December 2017, Nair observed that there was a serious decline on a Y-o-Y basis and the sector perhaps has not experienced such consistent decline in a long time. "This should be a huge concern for our industry and the country. The apparel industry is very labour-intensive. If exports go down so sharply and consistently, the employment will also go down," he cautions.

Apparels is a price-sensitive industry, maintains Guptaa, adding that further support from the Government will help improve the infrastructure over the time and increase India's competitiveness against rivals like Bangladesh.

The apparel manufacturers have to abide by the laws, extend all benefits to their employees and still be able to provide profitable pricing to clients. For this, they have to have the Government's support or else it is just a loss for all, he notes. "I urge MoT to design new policies to enhance India's textile and apparel industry competitiveness vis-à-vis other countries in the long term," Guptaa concludes.

Bangladesh draft policy to register apparel buying houses

Bangladesh Government is moving to bring discipline and accountability in the line of apparel buying houses. Ministry of Commerce has prepared a draft policy which has been forwarded to all stakeholders to shed light on its proposals. *Apparel Online* has obtained insights into the contents of the draft policy.

The policy entitles all buying houses to register with the Export Promotion Bureau (EPB). Without registration, no house will be able to handover Letter of Credit (LC) from buyers to manufacturers. Notably, there are over 1,000 apparel buying houses in Bangladesh, about 400 of which are under a structural body Bangladesh Garment Buying House Association (BGBA). These houses obtain orders from buyers abroad, source from local manufacturers and then deliver to those apparel buyers.

Up until now, these buying houses have been operating without a legal framework and oversight – which came to light rather badly when Bangladesh's apparel industry suffered a US \$ 72,000 setback, the largest in history, last year due to fake orders from a non-existent overseas source. "We welcome the Government's move," said Md Anwar Shahid, Vice President of BGBA to *AO*, adding, "This will be good for those who want to be genuinely involved in the buying house business. In fact, we have been pushing the Government for quite some time for this." Shahid is also the Managing Director of Shimex International Ltd., a buying house.

Further, *AO* has learnt that the draft policy would entitle both buying houses and apparel manufacturers to enter into a contract before finalising on a business deal. Copies of the draft contracts would then have to be endorsed by their respective organizations. Buying houses in the country would then have to remain



Buying houses or buying agents will have to send statements of order placement of garments export to the BGBA every three months. In turn, the trade association will have to send attested copies of the statements to Bangladesh Bank and EPB.

transparent in determining prices while negotiating between garment buyers and exporters.

After handing over the letters of credits to exporters on behalf of buyers, the buying houses will have to continue to carry out its responsibilities until the payment is delivered to the exporters. As per the draft, buying houses or buying agents will have to send statements of order placement of garments export to the BGBA every three months. In turn, the trade association will have to send attested copies of the statements to Bangladesh Bank and EPB.

Additionally, there will be a panel to monitor and supervise the activities of the registered buying houses. It will inform the Ministry of Commerce in case of any discrepancy in following the regulations. It will also recommend necessary actions that need to be taken against a violator.

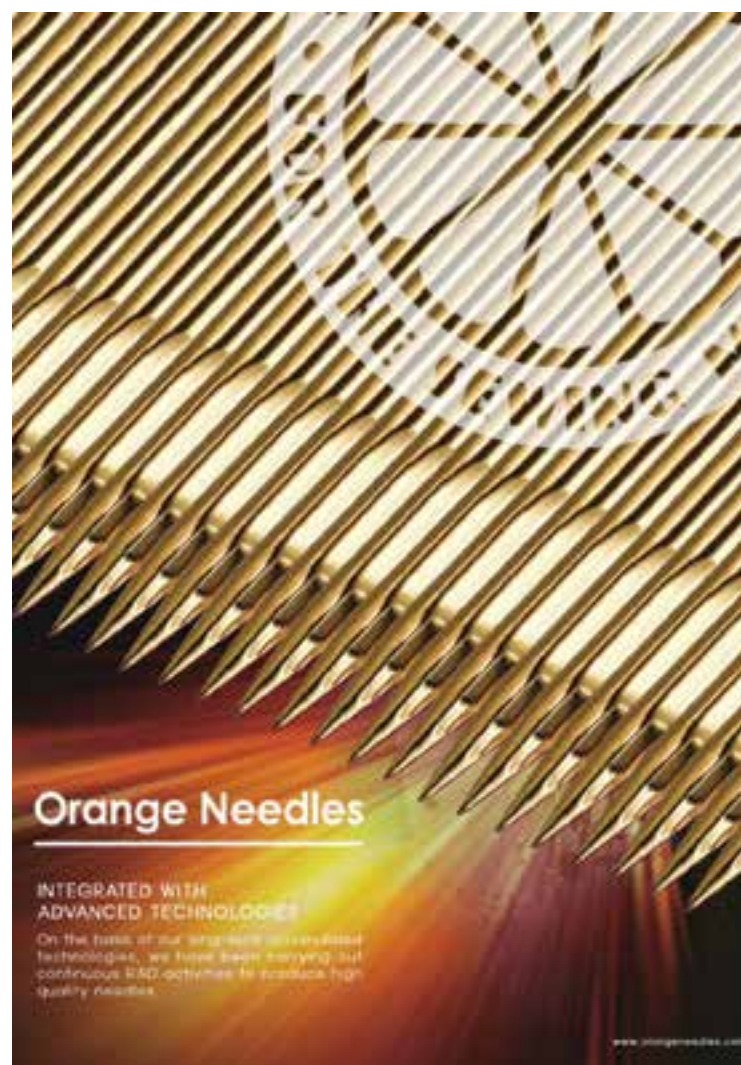
"Our aim is to expand our apparel export market by creating a good reputation. Until now, there has been no policy for the apparel buying houses, and these houses have been operating without supervision," Abdur Rahim Khan, Deputy Chief, Textile Cell, Ministry of Commerce, told media.

Workers call off strike in Myanmar

Around 200 workers of a garment manufacturing factory in Myanmar, who were on strike since February 1, 2018, have now returned to work after the management positively responded to some of their demands. The workers are associated with the garment factory which is located in Industrial Zone 1, Hlaing Tharyar Township in the Yangon region. The Chinese-owned factory has been operational in the country for last 10 months, as reported. According to media reports, the garment company – reportedly called One of Front – agreed to go ahead with four out of their five demands. The workers were demanding to have a local supervisor instead of a foreigner, requested for good behaviour at the workplace, repayment of reduced wages and

removal of CCTV cameras from/ around the ladies toilets, reports *The Myanmar Times*. Earlier, the company's management responded negatively to the workers' demands to rehire their sacked leader Ko Thant Zin Htwe. The factory is now waiting for the Arbitration Council's decision on the matter.

Workers, who have returned to work, have decided to wear red armbands while at work as a sign of peaceful protest against the management's refusal to reappoint their leader. Notably, Myanmar's National Tripartite Committee on the Minimum Wage increased basic pay wage to garment workers of the country by 33% earlier this year. The new minimum wage will be 4,800 kyats/day, effective from March 2018.



EU continues rising its apparel imports

January to November 2017

The European Union has witnessed upward trend with a sharp increase in volume-wise apparel imports. The fall in unit prices of the imported apparels, especially from China and India, was an added advantage for the Union and its clothing market. The retailers, seeing the rise in the market due to holiday season, buckled the belt and helped mark 2.33% rise in the overall apparel import by the EU. However, a decline can be noted in the month of December which is considered a month of slowdown as far as apparel imports are concerned.

Global apparel imports by the European Union: Jan.-Nov.'17

Change in Quantity

↑ 2.33%

Change in Value

↑ 1.79%

Change in UVR

↓ 0.52%

(Average UVR in the review period was Euro 17.18 per kg of fabric equivalent as against Euro 17.27 in the same period last year)

Change in Knitted Segment

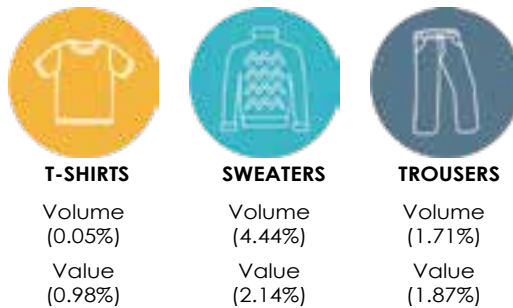
Quantity	Value
↑ 2.71%	↑ 2.06%

Change in Woven Segment

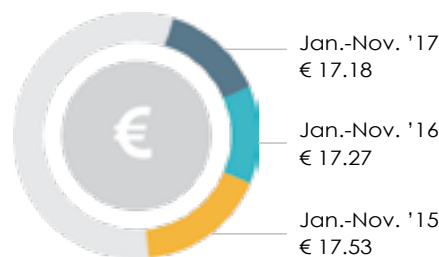
Quantity	Value
↑ 1.84%	↑ 1.52%

[The information has been extracted from EU custom site and further analyzed.]

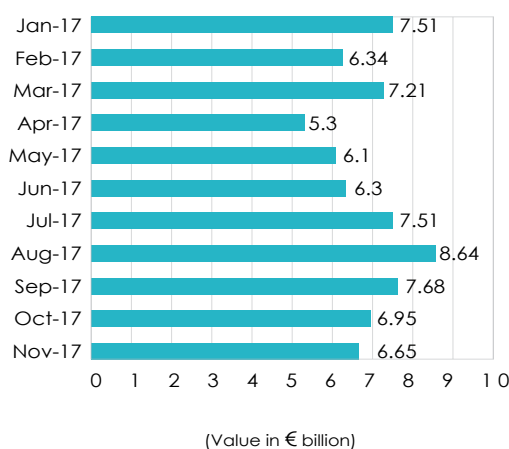
Top 3 product categories imported by EU



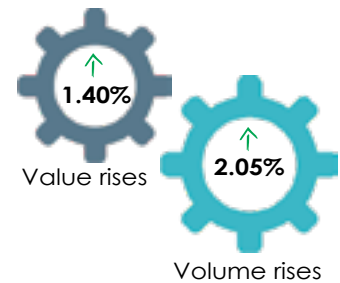
UVR change in apparel imported by EU (three-years comparison)



Month-wise EU apparel import trend



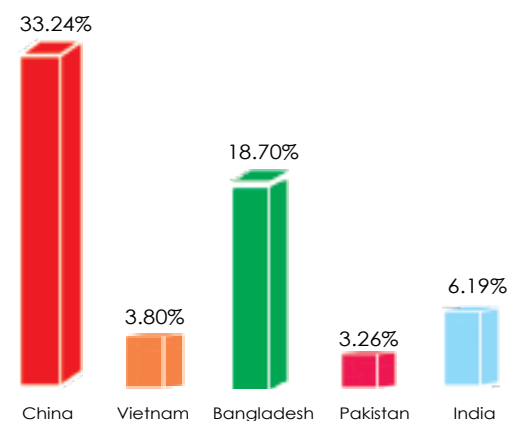
India's top product category (T-shirts) to EU



Spending on clothes per year by the consumers in Denmark, Finland and Sweden:

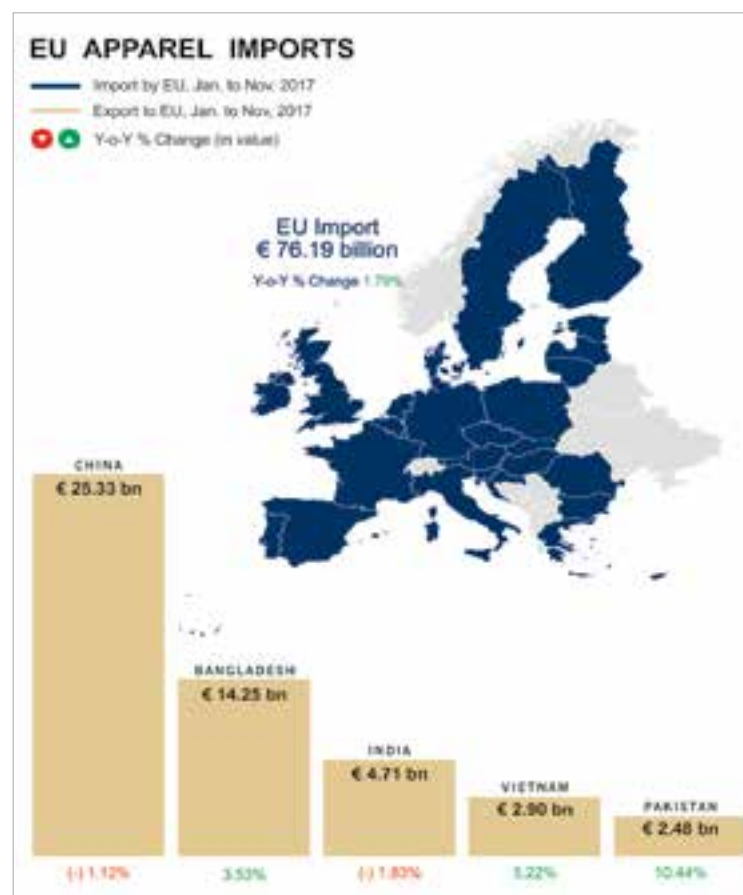


Value-wise share to EU by top exporters (Jan.-Nov.'17)



Apparel imports of the EU: Selected Countries (Qty in mn Kg & Value in mn Euro)

Country/ Category	Jan.-Nov. 2016		Jan.-Nov. 2017		% Change	
	Qty	Value	Qty	Value	Qty	Value
WORLD						
Knitted	2439.72	37254.90	2505.81	38023.05	2.71	2.06
Woven	1894.88	37594.25	1929.76	38165.68	1.84	1.52
Total	4334.59	74849.16	4435.58	76188.73	2.33	1.79
CHINA						
Knitted	845.82	11831.34	864.64	11813.22	2.23	-0.15
Woven	802.42	13789.02	792.89	13519.53	-1.19	-1.95
Total	1648.23	25620.36	1657.53	25332.74	0.56	-1.12
INDIA						
Knitted	150.42	2422.63	153.68	2446.95	2.17	1.00
Woven	94.49	2382.19	90.18	2269.88	-4.57	-4.71
Total	244.92	4804.82	243.86	4716.82	-0.43	-1.83
BANGLADESH						
Knitted	643.58	7935.28	665.37	8268.84	3.39	4.20
Woven	369.73	5832.57	384.11	5984.62	3.89	2.61
Total	1013.31	13767.85	1049.49	14253.46	3.57	3.53
SRI LANKA						
Knitted	51.17	814.47	41.69	851.76	-18.53	4.58
Woven	22.95	535.83	23.45	564.70	2.19	5.39
Total	74.12	1350.30	65.14	1416.47	-12.12	4.90
PAKISTAN						
Knitted	91.46	985.75	102.63	1113.05	12.21	12.91
Woven	91.05	1263.72	98.75	1371.34	8.45	8.52
Total	182.51	2249.47	201.38	2484.39	10.34	10.44
VIETNAM						
Knitted	38.84	833.10	44.17	906.67	13.72	8.83
Woven	82.68	1924.45	83.89	1994.91	1.46	3.66
Total	121.52	2757.55	128.06	2901.58	5.38	5.22



Item-wise quantity increase/decrease in apparel imports by EU: Jan.-Nov. 2017 (Qty in mn kg)

APPAREL TYPE	Total Imports by EU			Exports to EU											
	2016	2017	% Change	China			India			Bangladesh			Vietnam		
				2016	2017	% Change	2016	2017	% Change	2016	2017	% Change	2016	2017	% Change
Babieswear	113.64	113.69	0.04	44.09	42.03	-4.66	17.63	17.60	-0.13	27.70	29.21	5.48	1.06	1.17	9.79
Foundation Garments	49.26	49.58	0.65	30.63	29.50	-3.69	0.30	0.29	-3.51	5.10	5.55	8.75	1.41	2.08	47.46
Jackets & Blazers	115.80	111.39	-3.81	61.24	57.28	-6.46	2.41	2.07	-14.23	9.28	8.78	-5.37	9.12	8.06	-11.70
Ladies Blouses	107.06	107.30	0.22	31.79	32.08	0.92	21.45	20.87	-2.72	14.86	16.11	8.40	4.76	4.24	-11.01
Ladies Dresses	157.71	163.17	3.46	60.77	62.43	2.74	19.49	19.37	-0.63	18.03	20.49	13.63	4.40	4.15	-5.75
Ladies Skirts	43.38	40.68	-6.22	16.40	15.61	-4.82	3.27	2.89	-11.54	6.63	6.06	-8.66	1.47	1.44	-2.69
Legwear	185.64	194.50	4.77	95.87	101.10	5.46	2.03	2.31	13.80	1.78	1.49	-16.11	0.60	1.90	215.95
Men's Shirts	250.97	251.02	0.02	42.31	42.31	0.01	22.88	21.94	-4.09	100.17	101.99	1.82	10.12	9.93	-1.88
Nightwear	147.87	152.38	3.06	60.78	62.17	2.29	25.64	26.33	2.71	23.60	22.65	-4.02	2.40	2.49	3.80
Suits / Ensembles	42.23	40.47	-4.15	23.96	22.68	-5.36	1.77	1.88	6.51	2.49	3.24	30.10	0.50	0.52	3.41
Sweaters	547.93	572.26	4.44	216.09	215.78	-0.15	11.91	12.60	5.75	157.29	165.43	5.17	6.70	6.89	2.78
Trousers	1026.45	1044.05	1.71	267.47	257.34	-3.79	37.90	38.60	1.84	314.90	322.04	2.27	32.22	33.23	3.12
T-Shirts	548.35	548.62	0.05	63.02	62.00	-1.62	47.80	48.78	2.05	255.57	257.80	0.87	6.30	7.00	11.14
Undergarments	130.82	124.11	-5.13	65.19	60.36	-7.41	8.85	8.19	-7.43	20.93	20.59	-1.60	2.34	2.91	24.45

Item-wise value increase/decrease in apparel imports by EU: Jan.-Nov. 2017 (Value in mn Euro)

APPAREL TYPE	Total Imports by EU			Exports to EU											
	2016	2017	% Change	China			India			Bangladesh			Vietnam		
				2016	2017	% Change	2016	2017	% Change	2016	2017	% Change	2016	2017	% Change
Babieswear	2240.54	2249.75	0.41	869.99	823.20	-5.38	368.72	370.35	0.44	478.53	518.13	8.27	24.44	27.28	11.61
Foundation Garments	1716.94	1773.21	3.28	849.10	827.22	-2.58	16.50	16.13	-2.26	173.09	183.74	6.16	80.01	111.94	39.92
Jackets & Blazers	2553.13	2459.19	-3.68	1114.77	1000.50	-10.25	57.96	54.01	-6.81	150.15	144.12	-4.01	203.52	182.31	-11.94
Ladies Blouses	3056.59	3151.28	3.10	833.74	868.52	4.17	649.90	648.28	-0.25	318.17	340.81	7.12	101.64	92.45	-9.04
Ladies Dresses	4055.80	4172.33	2.87	1589.99	1634.19	2.78	520.54	513.68	-1.32	272.04	311.42	14.48	95.41	86.47	-9.37
Ladies Skirts	936.47	898.09	-4.10	329.19	319.05	-3.08	83.77	71.38	-14.79	97.93	91.69	-6.37	29.44	27.64	-6.11
Legwear	1831.65	1913.05	4.44	688.84	747.09	8.46	25.34	26.07	2.87	19.20	17.69	-7.83	7.12	14.22	99.66
Men's Shirts	4956.57	4836.72	-2.42	823.85	778.36	-5.52	495.29	477.00	-3.69	1496.71	1506.00	0.62	258.32	247.26	-4.28
Nightwear	1620.47	1661.28	2.52	560.05	570.97	1.95	303.05	306.19	1.04	262.20	252.06	-3.87	25.49	19.80	-22.34
Suits / Ensembles	662.63	633.40	-4.41	250.67	238.51	-4.85	32.42	34.71	7.08	31.29	38.87	24.24	10.05	8.70	-13.49
Sweaters	9413.76	9615.12	2.14	3842.02	3765.66	-1.99	209.90	221.16	5.36	2145.78	2187.20	1.93	129.58	141.07	8.86
Trousers	16240.01	16543.15	1.87	3217.50	3111.85	-3.28	627.70	614.66	-2.08	4286.46	4329.74	1.01	605.69	646.23	6.69
T-Shirts	8309.71	8390.86	0.98	1082.54	1060.18	-2.07	777.75	788.61	1.40	2792.38	2901.11	3.89	139.19	141.92	1.96
Undergarments	2154.61	2156.68	0.10	850.88	829.60	-2.50	144.79	139.17	-3.88	359.94	368.39	2.35	70.14	83.23	18.67

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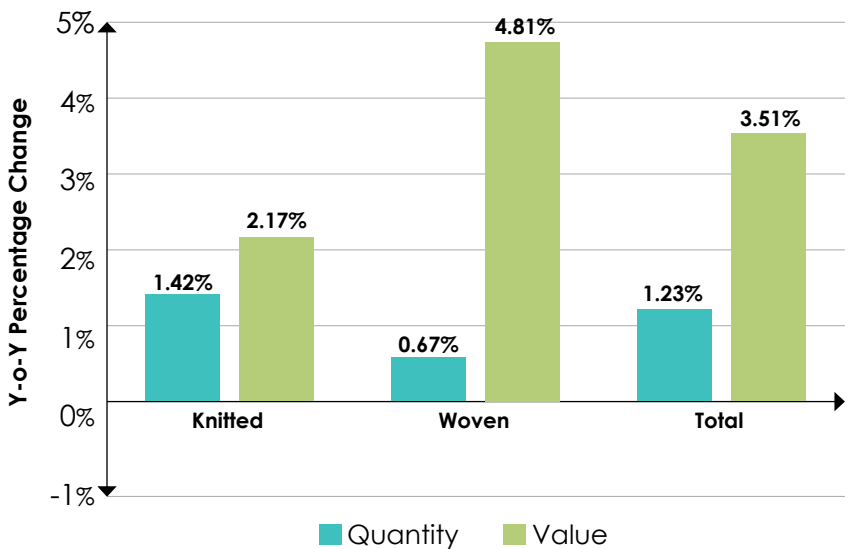
Japan Apparel Imports

January to November 2017

ASEAN continues to help Japan in its apparel imports

Till November, Japan saw rise in its apparel imports by 3.51% over the previous year. Quantitatively, apparel imports grew by 1.23% to 3,290 million units. The import quantities from the major ASEAN countries including Myanmar, Cambodia and Vietnam posted double-digit growth with knitwear playing a leading role.

Japan Apparel Imports (January - November 2017)



India Exports

During the review period, India fell in its volume-wise imports to Japan by (-) 1.44% whereas the country noted a boost in value by 2.24%.

Bangladesh Exports

Bangladesh noted decline in both knitted and woven segments as the apparel exports to Japan during the review period dropped by (-) 8.65% in volumes and (-) 3.69% in values, respectively.

Vietnam Exports

Vietnam witnessed surge in its apparel imports to Japan as it was up by 10.01% in volumes whereas the country saw 10.35% boost in export value.

China Exports

China improved in its apparel exports to Japan during the review period as it remained unchanged in volumes whereas, values surged by 1.92%.

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➔ HCA bats for stronger Government support to the industry

The apparel export industry is amidst a crisis that has not only eroded its competitiveness, but has also slowed down its growth substantially. Sadly, this critical condition has been brought upon by the 'uncertainty' created by continuous changes in policy and major blockages of funds that have rendered the industry short on liquidity to invest in the business. As an integral part of this industry, **Anil Anand, MD, HCA**, one among the leading technology providers, is really worried about the situation and is all praise for the entrepreneurial spirits of the industry players that have kept them going despite all the challenges.

The past year has been a difficult one for exporters and yet they came in large numbers to the recently concluded GTE to see the latest technology. This fighting attitude of the players has been the biggest saviour at a time when no one really knows where the direction is. "There has to be stability in policy; every day we see some change or the other... The Government is reactionary to how people are responding to announcements; there is no firm stand, so no one knows what to expect next," argued Anand. He firmly believes that the industry is willing to invest, but is holding back for clarity.

A clear direction that he does see today is the migration of companies towards newer destinations. "For many years I have been propagating that industry needs to move closer to the catchment areas and now I see it happening. Companies are seriously exploring options, whether it is Odisha, Jharkhand, Telangana or any other destination and this movement could spearhead a fresh lease of life to the garment export industry," said Anand. He adds that given the current facilities and infrastructure that these new destinations are offering,



Anil Anand (L), MD, HCA with his son Bhavya Anand

ESSENTIALS

Despite the positive change in mindset that Anand observes in the industry, he rues the fact that the Government is not as supportive as it should be. Giving the classic example of China, Anand reasons that for any country to progress smoothly, the support of the Government is a must, but unfortunately in India, the industry is left to fend for itself many times.

the industry need not look at foreign locations like Ethiopia and Bangladesh for new factories to be competitive. In the meanwhile, the technology providers are also gearing up to support the industry in its new direction and many are searching options to set up offices in the new areas.

Anand is also very happy with the increased acceptance of automation by the industry, and is positive that this interest will continue to increase. "Every one is talking about affordable automation, but if you see our logo, we have a line that says 'making automation affordable is our goal'. Today a button feeder which was considered automation some years ago is a common technology. The price has come down by 50% and this is because both the demand and production of the machine has increased," avered Anand. He feels that the industry is not only ready for automation, but it is also the need of the hour.

Despite the positive change in mindset that Anand observes in the industry, he rues the fact that the Government is not as supportive as it should be. Giving the classic example

of China, Anand reasons that for any country to progress smoothly, the support of the Government is a must, but unfortunately in India, the industry is left to fend for itself many times. "I am a bigger supporter of the 'Make in India' slogan, and have even tried to manufacture machines in the country, but it is not viable. Even after imports, the Chinese machines are 5-7% cheaper than my machines," shared Anand. The reason of course is that the manufacturing cost in China is heavily subsidised and other tax benefits make the machines so much more competitive on a global platform.

Anand also strongly feels that the age-old labour laws need to be relooked at. "Everyone wants to retain performers, but why should the industry be forced to carry the 'deadwood' also. It is important that the workers respect the work they do and add value to the organization, and this is possible only if their job is assessed by performance and not protected by law," argued Anand. HCA considers itself a partner to the industry and serving them better while standing at their side in difficult times is a commitment.

➔ JV Plastic Industries brings to India Embroflex badges

The sustainable growth of any company is dependent on how innovative and market-informed the company is; this fact is even more relevant for those working in the fashion/apparel business. JV Plastic Industries, headquartered in Delhi and a known name in all kinds of plastic garment accessories (plastic hangers, seal tags, tie hangers, garment clips, belt hangers, trouser clips, round sizer, collar clips), is always searching for new products to add to its already interesting collection. The latest from the company is embroflex badges for which they have an exclusive license to produce in India.

With the production of embroflex badges, JV Plastic has in its basket an item, which can otherwise only be imported, but the company claims that the options are not as beneficial as procuring from them. "The embroflex badges can certainly be imported, but delivery timeline and quality that we can serve, cannot be matched. Since we have very good and strong hand in mould making (technically) and have our own tool house, so it gives us complete control on quality, finish and delivery of the product. The price advantage would be about 15-20%, but



Kapil Lalwani (L), CEO and Heena Kalia, Marketing Manager, JV Plastic



Introduced in India for the first time, these embroflex badges give a 3D effect, and the depth and clarity of designs can go up to 10 colours which is far superior to embroidered badges.

there's more advantage of quality and finish," said **Heena Kalia, Marketing Manager, JV Plastic**, with conviction.

Her confidence is not based on perceptions but feedback that the company has received from users. "I have come across the same product imported by 2-3 customers of mine but they were not really satisfied with the quality they are being served. Also, they wanted an easy approachable supplier so that they also can have all the control here in India," explained Heena. The technology behind the product is a patented Japanese technique, and

one of the best features is the fact that the badges cannot be duplicated. Hence the brand's designs are secure and many sportswear companies prefer the embroflex badges, instead of the regular embroidered ones.

JV Plastic had showcased the new product at the recently held GTE and was very happy with the interest that the embroflex badge generated. International brands like Tommy and Ralph Lauren are already using these badges as differentiators and now even Indian brands like BlackBerry, Allen Solly, PVH are increasingly using the same. "We are capable of creating any design as given by the customer, but initially would expect a MoQ of 500 to 1000 pieces. As the number of pieces goes up, the better will be the price that we can offer," added Heena.

This new product adds to the already interesting range of innovative products that the company is offering, and includes, texture hangers with different kinds of flat hooks in different or multiple colour combinations; unbreakable hangers with high level of flexibility; increased range of plastic tags and wax thread in plastic seals.

➔ Peayush Machineries, happy with the market response

Peayush Machineries Pvt. Ltd. (PMPL) Delhi, one of the leading suppliers of various value addition machines, has had a keen eye on the growing need for value adding machines in recent time and is also positive about the future. "Market has already picked up for us as we offer a wide range of products and this gets us some new customers each time we display. Increased number of garment factories in the

market is leading to the current slowdown, but this also has worked in our favour as we were able to gain some new clients," stated **Prateek Chowdhary, MD** of the company.

Peayush Machineries mainly offers multi-head embroidery machines ('DAYU' brand) and laser marking machines, and currently enjoys a good customer base in Delhi-NCR.



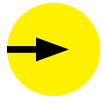
Prateek Chowdhary (L), MD Peayush Machineries Pvt. Ltd. with a visitor at GTE

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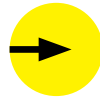
Shri Balaji Textile Company to start its own manufacturing

Kanpur-based Shri Balaji Textile Company/Shri Rani Sati Textile Agency that is mainly into textile, zipper and elastic trading business is now planning to start its own manufacturing of zipper and narrow fabric. **Shyam Agarwal** of the company said that enough scope in both product categories motivated him to take this initiative. He also explored machines for the same in a recent technology fair. "We have good relations with many garment manufacturers of 7 states. They are our existing as well as perspective clients, so we thought that we should have our own manufacturing," Shyam added.

Initially, Shyam will be investing Rs. 1 crore and the project is expected to start in the next few months. Currently, seeing the business prospects with Nepal, good business is expected in the future with the country. With experience in manufacturing pharmaceutical products, Shyam is very well aware of the manufacturing systems and expects that the initiative will help him achieve at least 20 per cent growth in the initial years.

ESSENTIALS

We have good relations with many garment manufacturers of 7 states. They are our existing as well as perspective clients, so we thought that we should have our own manufacturing.



Neelam Thread: New embroidery yarn introduced for home segment



Ankit Jain and Amit Jain of Neelam Thread with their latest product

At a time when most of the industry is still weighing the impact of sudden policy changes and putting expansions on hold, Delhi-based Neelam Thread, manufacturers of the widely popular 'Telephone' brand of embroidery threads has gone in for a major expansion in Barhi Industrial Area, both for its already running products and new products. "The last year was overall good for us and though there was a few hiccups post-GST, now the situation has eased out and we have gone ahead with our new unit, expecting even better business this year," said **Ankit Jain, Director, Neelam Thread Pvt. Ltd.**

Always seeking new products to offer its customers, the latest from the company, is 600 single viscose untwisted yarn for embroidery in home furnishing. The yarn has very good lustre and gives a rich look to the embroidery. The yarn is very difficult to dye, but the company has mastered the art and the final product drew much attention at the GTE in January. "The thread, being thicker yet so sleek in its finish, makes it very appropriate for embroidery on cushions and other home products," avered Ankit.

Doing only 20% business in the domestic market, and the majority 80% with exporters, Neelam Thread is well aware of international norms and its threads meet not only all quality parameters, but also are eco-friendly. With 600 plus shades to offer, the company has in its basket a range of viscose rayon embroidery threads, trilobal polyester embroidery threads, metallic zari and spun polyester threads, which are used for both embroidery and stitching purposes. For the convenience of its customers, the company has also recently introduced larger cone sizes. "These commercial packaging were an outstanding requirement from the industry and so we have given them the option," said Ankit.

The company is very upbeat of the new unit, which has all provisions for sustainable manufacturing, including the dyeing process. Latest machines are being installed and no compromise is being made to ensure best quality and excellent finish in line with the reputation that the company has already earned in the market as India's largest selling embroidery thread brand.



Shyam Agarwal, Shri Balaji Textile Company

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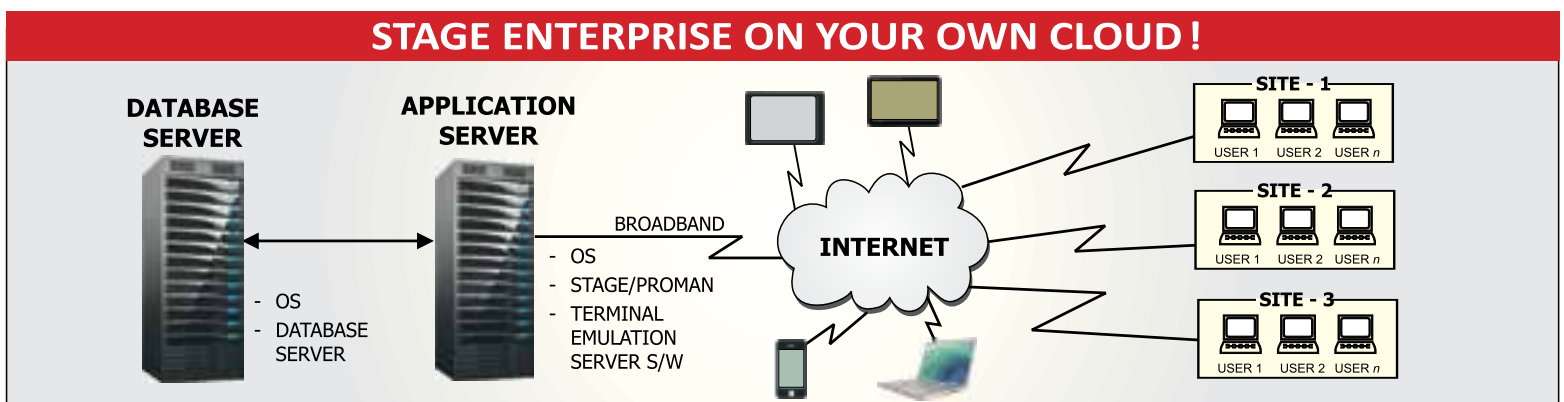
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Rainbow Narrow Fabrics going in for huge expansion

Just three years after its establishment, Delhi-based Rainbow Narrow Fabrics, (part of the 30-year-old Ambika Enterprise, Surat) is all set to go in for a massive expansion. In the next few months, the company will bring manufacturing of all kinds of elastics and narrow fabric under one roof, including shoulder and velcro tapes. It will also start its own manufacturing of yarn, as it consumes nearly 150 tonnes of yarn per month. Currently, this Oeko-Tex certified company has 250 machines (for woven, jacquard & knitted products) in Surat and produces nearly 6 lakh metres per day in a variety of elastics and tapes.

“We will be investing nearly Rs. 20 crore and all expansion will take place in Surat. To the best of our knowledge, there is no other company in India which manufactures all such products under one roof. So, this unit will be really different and special,” shared **Ashish Jain, Director** of the company, who is also expecting at least a 70 to 80 per cent growth in the coming years. The company is working with top exporters and famous brands like Orient Craft, Rupa and many others. It is directly exporting its products to countries like Hong Kong, Myanmar and plans to explore Bangladesh and Sri Lankan market in the near future.



Our idea was to create a brand, an image in the minds of exporters. We are happy that in 3 years, exporters recognize our brand 'Allience' and appreciate our products”

– Ashish Jain

Harish Sharma, Marketing Manager of the company shared that currently they are serving the exporters through the Delhi factory. “Being near to the exporters, we are able to deliver very quickly, and in required quantities, as per the quality parameters of the export industry,” added Harish. In Surat, the company works with wholesalers and traders, while in Delhi it caters to mostly the exporters and end users. “The reality of the Indian elastic market is that it is unorganized. There are only a few organized companies in this field. Therefore, a company like us, having the complete know-how, using the best raw materials and advanced machinery and possessing better control over quality, serves the customers better, be it in product development, delivery or quality,” Harish concluded.



Ashish Jain (R), Director, and Harish Sharma Marketing Manager, Rainbow Narrow Fabrics

Baba Textile Machinery expecting good business



Murari Lal Parasurampuria (R), Director of the company

Baba Textile Machinery (India), a prestigious name in relation to embroidery machines, has recently introduced the HP model embroidery machine. This Chinese machine has been well appreciated by the users and is at par with Japanese quality standards. “We have improved a lot in terms of quality at various levels, especially in the stitching and trimming areas. Overall, even the design quality has improved. Our machines can easily move at the speed of 1100 RPM and still remain stable. With these improvements, we should have good orders in the future!” exclaimed **Murari Lal Parasurampuria, Director** of the company. These advancements were displayed by the company at the recently concluded GTE and was able to gain positive response. “We had an impression about the recession, but seeing the response and enthusiasm of the visitors/clients, we are happy and expect good business prospects,” concluded Parasurampuria. The company claims that it sold 916 machines during FY 2016-17 compared to 655 during the FY 2015-16. Apart from multi-head computerized machines, the company also offers laser cutting and engraving machines. It has offices in Kolkata, Jaipur, Varanasi, and aims to support customers with its quick service.

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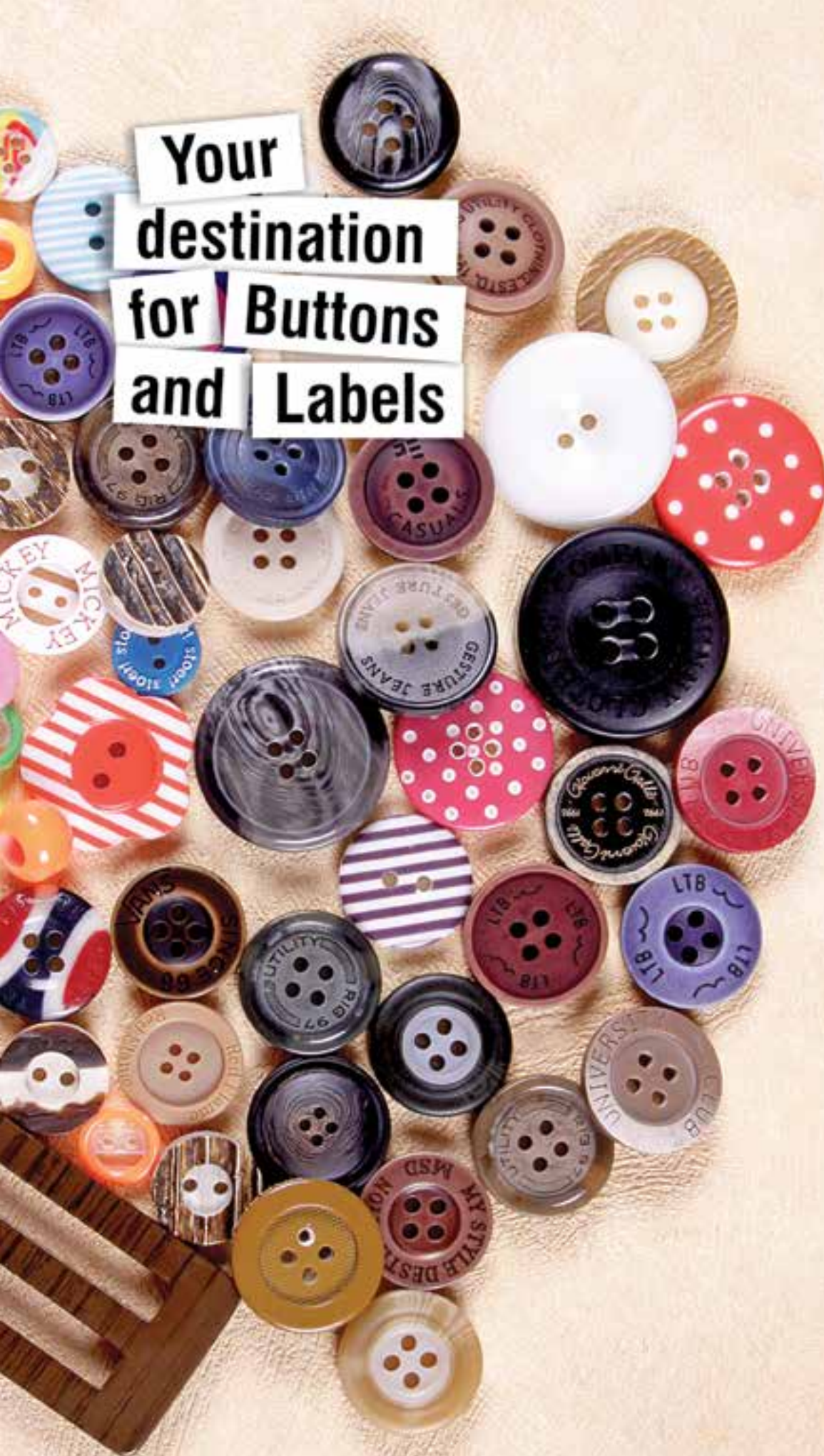
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Scissorfobz to focus more on Indian products

Working as a vendor with Walmart and other retail stores in the US like Hobby Lobby, Michaels and Jo-Ann Stores (Jo-Ann Fabrics), **Scissorfobz** (a division of Vision Imports, New York) will now focus more on Indian products. The company, doing overall business of nearly US \$ 2 million per year, is working with 5 vendors in India on an average basis. Increasing cost in China has motivated the company to focus more on India. **Sandy Mehra, VP – Sales & Marketing** of the company recently met Team *Apparel Online* and informed, “It’s my personal initiative to bring some more business to India, so for the next collection that I am presenting to Walmart, I will give them 100 per cent Indian products like fashion accessories and some of the craft items.” He further added that even from India, there



Sandy Mehra (R), VP – Sales & Marketing, Scissorfobz with Sushil Aggarwal, MD, Eves Fashion, Delhi

is inflation of prices of about 10 per cent while in China it is 20 to 25 per cent. “Costing from India is also increasing but it is comparatively better than China because if China appreciates its RMB by even 1 per cent, cost goes up by 5 per cent,” he added. Currently the company is sourcing 50 per cent from India and rest 50 per cent is from China and Taiwan.

Pink Village Trading to start working directly with exporters

Pink Village Trading LLC, Dubai, an importer and wholesaler company from Dubai, is planning to work directly with Indian exporters. Sourcing around one million pieces per year (mostly menswear) from India and supplying further to Middle East market, **Vinod, MD** of the company was recently in India. He shared with *Apparel Online* that high costing is the only concern with regard to sourcing from India. And for the same, he is trying to avoid whatever mediocre products which are there in the market, as of now. “Despite high costing in India, we are procuring from here just because of easy communication, good quality and smaller quantities. Looking at the current market situation in Dubai, 2018 is expected to remain normal and not much improvement is expected in this year, while 2019 should



Vinod (L), MD, Pink Village Trading LLC, Dubai with Rakesh Garg, MD, Worldwide Textiles, Ludhiana



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go well,” he added. Currently Vinod is working with the apparel exporters of Ludhiana, Jaipur, Delhi and Mumbai.

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