



# TEXTILES AND APPAREL

April 2010

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# Advantage India

## Raw material production

- India has the largest area under cotton cultivation — 9 million hectares — constituting 25 per cent of the world's total cultivation area.
- India is the second-largest producer of silk in the world.

## Favourable government policies

- Initiatives such as the Technology Upgradation Fund Scheme (TUFS) and Technology Mission on Cotton (TMC), among several others, aid the development of the domestic industry and attract potential investors.

## Advantage India

## Sourcing hub

- Several international retail giants such as Marks & Spencer are leveraging India as a key global sourcing destination.

## Availability of skilled workforce

- The industry is the second-largest employment generator after agriculture.
- Several centres of excellence are available for providing an impetus to academics and research in textiles.

Sources: Ministry of Textiles 2008–09 annual report; “Note on sericulture and the silk industry,” Ministry of Textiles.

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## Market overview

- The textiles industry accounts for 14 per cent of the total industrial production in India.
- At current prices, it accounts for 4 per cent of the GDP — US\$ 51.36 billion.
- The textiles segment, comprising cotton, wool, silk, manmade and jute textiles and textile products, has grown by 7.5 per cent between April and November 2009, as compared to 1 per cent in the same period in 2008.
- The industry provides direct employment to more than 35 million people and is the second-largest employment generator after agriculture.

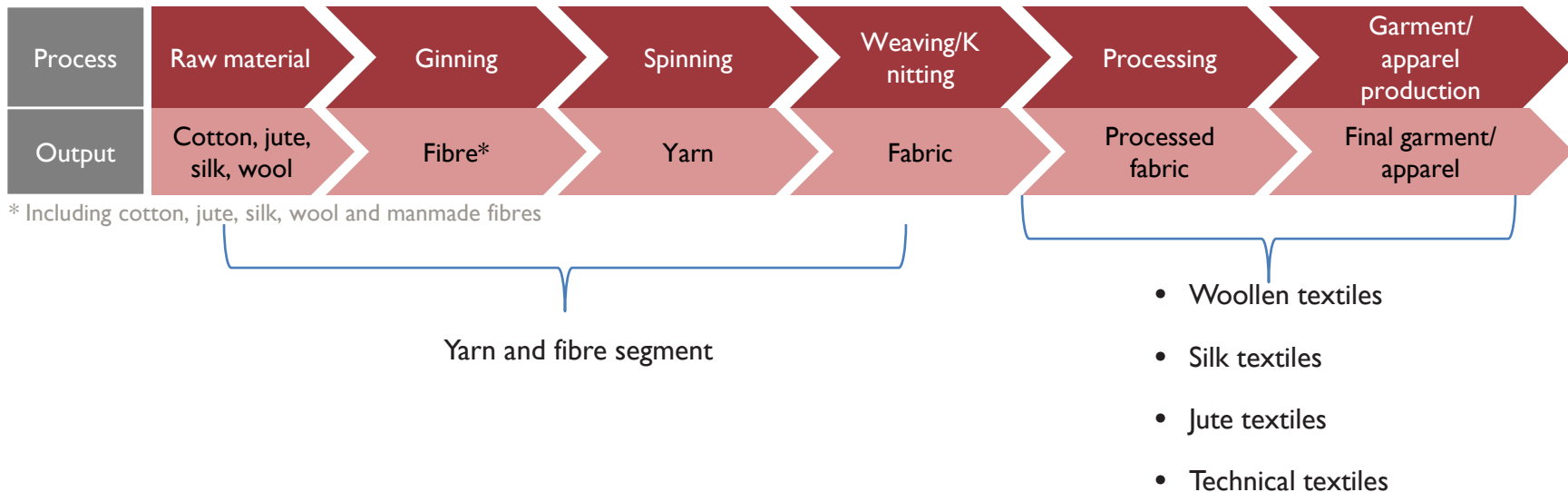
Sources: Ministry of Textiles 2008–09 annual report; Chapter 9, Socio-Economic Review 2009–2010.

## Market segments

The textiles and apparel industry can be broadly segmented as

- Yarn and fibre (including natural and manmade fibre and yarn)
- Processed fabrics (including woollen textiles, silk textiles, jute textiles, cotton textiles and technical textiles), readymade garments (RMGs) and apparel

### Key segments of the textiles industry



Source: Ernst & Young research

## Yarn and fibre segment

- Fibre and yarn are of two types — natural and manmade.
- Natural fibre includes cotton, wool, hemp and flax.
- India has the largest area under cotton cultivation (9 million hectares), constituting 25 per cent of the total area in the world.
- Wool, silk and manmade textiles segments collectively posted 13 per cent growth between April and November 2009.
- In 2008–09, the number of non-small scale industry (SSI) spinning and composite mills in the country were 1,828, with a total installed capacity of 41.3 million spindles, 657,000 rotors and 56,000 looms.

Production of natural fibre

Type	Units	Production
Cotton	million bales	29 (2008–09)
Raw wool	million kg	45 (2007–08)
Raw silk	million kg	18.31 (2007–08)

Sources: Ministry of Textiles 2008–09 annual report; Note on man-made fibre and filament yarn industry, Ministry of Textiles; Textile Industry Overview, Ministry of Textiles; Socio-Economic Review 2009–2010.

## Yarn and fibre industry segment

- Manmade fibre is synthetically produced using fibre-forming chemical substances.
- The total production of manmade staple fibre and manmade filament yarn in 2008–09 was 1,042 million kg and 1,425 million kg, respectively.
- Of the total consumption of 6.33 billion kg of fibre (including cotton and manmade), 2.62 billion kg (41 per cent) was manufactured by the manmade fibre/yarn segment in 2008–09.

Sources: Ministry of Textiles 2008–09 annual report; Note on man-made fibre and filament yarn industry, Ministry of Textiles.

Production of manmade fibre/filament yarn

Type	Production (million kg) 2008–09
Staple fibre	
Polyester	733
Viscose	229
Acrylic	78
Polypropylene	2
Filament yarn	
Polyester	1,315
Viscose	66
Nylon	28
Polypropylene	16

## Fabric production

- 54,966 million sq m of fabric (including khadi, wool and silk) was produced in 2008–09.

Fabric production in different segments (2008–09) in million sq m

Sector	Cotton	Blended	100% non-cotton (including khadi, wool and silk)
Mill	1,260	426	111
Handloom	5,840	118	719
Decentralised power loom	9,621	4,764	19,263
Decentralised hosiery	10,178	1,458	441

Sources: Ministry of Textiles 2008–09 annual report; “Textile industry overview,” Ministry of Textiles.

## Processed fabric, RMG and apparel

- The production of RMGs and apparel from processed fabric is the final stage in the production process of textiles.
- The textiles produced at this stage after processing include
  - Woollen textiles
  - Silk textiles
  - Jute textiles
  - Technical textiles
- In terms of production, textile products registered high growth of 9.9 per cent between April and November 2009, while cotton textiles registered a growth of 3.2 per cent during the same period.
- The production of textile fabrics increased by 10.7 per cent between April and November 2009, with the hosiery segment registering the highest growth of 12.8 per cent during this period.

Source: Socio-Economic Review 2009–2010.

## Processed fabric, RMG and apparel

Major textile production clusters in India

Product	State
Woollen knitwear	Punjab (Ludhiana)
Handloom, made-ups	Haryana (Panipat)
Handblock printing, apparel manufacturing	Rajasthan (Sanganer)
Hand processing	Rajasthan (Jodhpur)
Defence-related textiles	Uttar Pradesh (Kanpur)
Powerloom weaving and processing	Gujarat (Surat)
Cotton hosiery	West Bengal (Kolkata)
Powerloom towels and blankets	Maharashtra (Sholapur)
Cotton ginning	Andhra Pradesh (Guntur)
Home furnishings	Kerala (Kannur)
Cotton knitwear	Tamil Nadu (Tirupur)
Powerloom, handloom, home furnishing	Tamil Nadu (Coimbatore)
Surgical textiles	Tamil Nadu (Madurai)

Source: "India in the Global Textiles Ecosystem," 2007, Ernst & Young, CII

## Woollen textiles ... (1/2)

- The woollen textiles segment provides employment to nearly 2.7 million people across India.
- India is the seventh-largest producer of wool and contributes 1.8 per cent to the total wool production in the world.

Estimated production of woollen items (2007–08)

Woollen item	Unit	Production
Wool tops	million kg	37
Fabric (woollen worsted)	million metres	85
Blankets (shoddy/woollen)	million pieces	18
Shoddy fabric	million metres	33
RMG (knitwear/ woven wear and goods)	million kg	19
Hand-made carpets	million sq m	11
Machine-made carpets	million sq m	00.50

Source: Ministry of Textiles 2008–09 annual report.

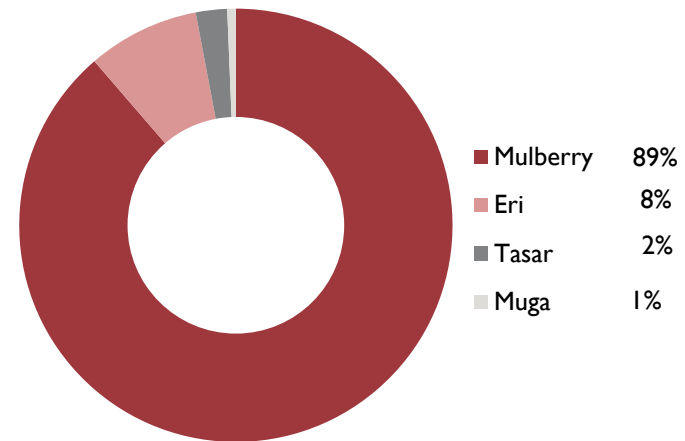
## Woollen textiles ... (2/2)

- The industry comprises both organised and decentralised sectors
  - Organised sector
    - Composite mills
    - Combing units
    - Worsted and non-worsted spinning units
    - Knitwear and woven garment units
    - Machine-made carpet manufacturing units
  - Decentralised sector
    - Hosiery and knitting units
    - Powerloom units
    - Hand-made carpets and druggets units
    - Independent dyeing and process houses

## Silk textiles

- Sericulture is a labour-intensive cottage industry, providing employment to nearly six million people in India.
- India is the second-largest producer of silk (after China), with a production of 18,320 MT of silk in 2007–08 (14 per cent of the world’s silk production).
- India produces four varieties of silk (2007–08)
  - Mulberry (16,245 MT)
  - Eri (1,530 MT)
  - Tasar (428 MT)
  - Muga (117 MT)
- In 2007–08, the top five silk-producing states in India were Karnataka (8,240 MT), Andhra Pradesh (4,485 MT), West Bengal (1,700 MT), Tamil Nadu (1,368 MT) and Assam (956 MT).

Production of silk varieties (2007–08)



Sources: Ministry of Textiles 2008–09, annual report; Note on Sericulture and Silk Industry, Ministry of Textiles.

## Jute textiles

- The jute industry provides direct employment to about 260,000 industrial workers and livelihood to another 140,000 people in tertiary and allied activities.
- The production of raw jute between July 2008 and June 2009 has been estimated at 8.2 million bales (1.47 billion kg).
- There are 77 composite jute mills in India, of which about 78 per cent (60 mills) are located in West Bengal. The remaining are in Bihar, Uttar Pradesh, Andhra Pradesh, Assam, Orissa, Tripura and Chhattisgarh.
- Installed capacity in jute mills, other than 100 per cent export-oriented units (EOUs), was estimated at 2.56 MTPA in 2008–09.
- The total quantity of jute goods produced in 2008–09 was estimated at 1.63 MT.

*Sources:* Ministry of Textiles 2008–09 annual report; “Production of jute goods,” Office of the Jute Commissioner; “Note on the jute and jute textiles industry,” Ministry of Textiles.

## Technical textiles ... (1/3)

- Technical textiles are textile material and products manufactured primarily for their technical performance and functional properties.
- The market size of technical textiles in India was estimated at US\$ 8.3 billion (INR 398.76 billion) in 2007–08.
- The industry is largely based on synthetic fibre and yarn as raw material.

*Source:* “Domestic technical textiles industry,” Ministry of Textiles

## Technical textiles ... (2/3)

- Major technical textiles being manufactured include
  - Buildtech — building and construction (awnings, canopies)
  - Clothtech — functional apparel and footwear
  - Protech — personal and property protection (functional clothing such as firefighters' uniforms)
  - Agrotech — agriculture, horticulture, forestry (crop shades)
  - Hometech — components of furniture, household textiles and floor coverings (blinds, upholstery)
  - Meditech — hygiene and medical (diapers, surgical dressings, contact lenses)
  - Mobiltech — seat upholstery, seatbelts in automobiles, shipping, railways and aerospace
  - Oekotech — products for environmental protection
  - Geotech — geotextiles, civil engineering
  - Packtech — packaging material
  - Indutech — filtration products, conveyor belts
  - Sportech — sport and leisure (shoes, sports equipment)

Source: "Domestic technical textiles industry," Ministry of Textiles

## Technical textiles ... (3/3)

- India is a large producer of products in the packtech, clothtech, hometech and sportech segments.
- Key domestic players in this industry include SRF, Entremonde Polycoaters, Kusumgarh Corporates, Supreme Nonwovens Pvt Ltd, Garware Wall Ropes, Century Enka, Techfab India Ltd, Ahlstrom, Pacific Non Woven, Vardhman and Unimin.
- Key foreign players include Johnson & Johnson, Du Pont, Procter & Gamble, 3M, SKAPs and Kimberly Clark.
- This industry is still largely untapped and has immense potential for attracting investments. The Working Group for the Eleventh Five Year Plan (2007–2012) has estimated the market size of technical textiles to reach US\$ 10.87 billion (INR 522 billion) by 2011–12.

*Sources:* “Baseline Survey of the Technical Textiles Industry of India,” Office of the Textiles Commissioner, 2009; Note on technical textiles, Ministry of Textiles.

## EXIM scenario — exports

Textiles and apparel industry exports, valued at US\$ 20.02 billion (INR 963.05 billion), contributed about 11.5 per cent to the country's total exports in 2008–09.

Export item	Export value (2008–09) US\$ billion (INR billion)	Share in total textiles exports (%)
Cotton textiles	4.54 (218.08)	22.64
Manmade textiles	3.14 (150.88)	15.67
Silk textiles	0.64 (31.06)	3.23
Wool and woollen textiles	0.45 (21.99)	2.28
RMG	9.81 (471.1)	48.92
Handicrafts (including carpets)	1.02 (49.39)	5.13
Jute	0.28 (13.75)	1.43
Coir and coir products	0.14 (6.80)	0.71

Source: "Textiles exports," Ministry of Textiles.

## EXIM scenario — imports

The total textiles imports into India in 2008–09 were valued at US\$ 3.33 billion (INR 160.93 billion).

Import item	Import value (2008–09) US\$ billion (INR billion)	Share in total textiles imports (%)
Raw material	0.78 (37.84)	23.51
Semi-raw material	0.75 (36.14)	22.46
Yarn, fabrics	1.46 (70.49)	43.80
RMG	0.13 (6.25)	3.88
Made-up textiles articles	0.21 (10.21)	6.35

Source: “Textiles imports,” Ministry of Textiles

## Key players ... (1/2)

Company	Turnover (2008–09) US\$ billion (INR billion)	Business areas
Welspun India Ltd	1.19 (57.4)	Home textiles, bathrobes, terry towels
Vardhman Group	0.7	Yarn, fabric, sewing threads, acrylic fibre
Alok Industries Ltd	0.62 (29.76)	Home textiles, woven and knitted apparel fabric, garments and polyester yarn
Raymond Ltd	0.54	Worsted suiting, tailored clothing, denim, shirting, woollen outerwear
Arvind Mills Ltd	0.48 (23.44)	Spinning, weaving, processing and garment production (denims, shirting, khakis, knitwear)
Bombay Dyeing & Manufacturing Company Ltd	0.27 (13.16)	Bed linen, towels, furnishings, fabric for suits, shirts, dresses and saris in cotton and polyester blends
Garden Silk Mills Ltd	0.27 (13.31)	Dyed and printed fabric

## Key players ... (2/2)

Company	Turnover (2008–09) US\$ billion (INR billion)	Business areas
Mafatlal Industries Ltd	0.03 (1.27)	Shirting, poplins, bottomwear fabrics, voiles
Aditya Birla Nuvo, a diversified conglomerate of the Aditya Birla Group, comprising three divisions — Madura Garments, Jayashree Textiles and Indian Rayon	3 (consolidated revenues for Aditya Birla Nuvo)	Madura Garments — lifestyle market (Louis Philippe, Van Heusen, Allen Solly, The Collective) Jayashree Textiles — domestic linen and worsted yarn Indian Rayon — viscose filament yarn
ITC Lifestyle	0.62 (for total FMCG business)	Lifestyle market
Reliance Industries Ltd	28.85 (total group)	Fabric, formal menswear

Source: Relevant company websites and annual reports

## Key trends

- **Sourcing**

There has been a surge in textile sourcing from India, which is estimated to grow to US\$ 37 billion by 2011. India's abundant supply of raw material such as cotton, silk and jute is a major driver for sourcing by international retail players from India. Companies such as Marks & Spencer, Hagggar Clothing, Kellwood, Little Label, Boules Trading Company, Castle, Alster International and Quest Apparel Inc have opened their liaison offices in India. Wal-Mart, JC Penny, Nautica, Docker and Target source textiles and apparel from India.

- **Establishment of institutes and training centres in PPP mode**

The Ministry of Textiles has undertaken the initiative to establish institutes in the PPP mode to encourage participation from the private sector for the development of the industry.

*Sources: India in the Global Textiles Ecosystem 2007, Ernst & Young & CII; Note on technical textiles, Ministry of Textiles.*

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## Industry infrastructure ... (1/2)

Name of SEZ and status	State	Area (hectares)	Sector	Developer/Promoter	Details
Mahindra City SEZ (Functional)	Tamil Nadu	607.05	Apparel and fashion accessories	Mahindra Group and Tamil Nadu Industrial Development Corporation (TIDCO)	Mahindra City is India's first integrated business city, divided into business and lifestyle zones. The business zone provides plug-n-play working spaces. This zone comprises an SEZ (primarily for exporters) and domestic tariff area (DTA) for companies targeting the domestic market. The lifestyle zone offers residential units, schools, medical centres, malls, business hotels and recreation facilities. The city's customers include B. Braun, BMW, CapGemini, Infosys Technologies, Lincoln Electric, Renault-Nissan, Timken, TVS Group and Wipro.
Surat Apparel Park (Functional)	Gujarat	56	Textiles	Gujarat Industrial Development Corporation (GIDC)	Key industrial units include Safari Exports, Venus Garments, Benchmark Clothings, P. K. International, Tormal Prints, J.R. Fashion and Ganga Export.

## Industry infrastructure ... (2/2)

Name of SEZ and status	State	Area (hectares)	Sector	Developer/ Promoter	Details
Brandix India Apparel City (BIAC) (Functional)	Andhra Pradesh	404.7	Textiles	Brandix India Apparel City Pvt Ltd	Integrated apparel supply chain city; plans to house world-class apparel chain partners. 60 million litres of water per day is available. Has one of the most advanced effluent treatment systems in the region. BIAC has a dedicated 200 MW power sub-station.
Karnataka Industrial Areas Development Board (KIADB) (Functional)	Karnataka	-	Textiles	Karnataka Industrial Areas Development Board (KIADB)	

Sources: Relevant SEZ websites

In addition to the four functional SEZs, there are 13 in-principle approved, 19 formally approved and 12 notified SEZs in India.

Sources: "SEZs : Sectorwise distribution", SEZs in India, Ministry of Commerce.

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## Investments

- An FDI cell has been set up in the Economic Division of the Ministry of Textiles to attract FDI in the textile sector.
- The cumulative FDI in this sector (between April 2000 and January 2010) has been valued at US\$ 815.48 million.
- A key deal in 2009 was S. Kumars Nationwide Limited (SKNL)'s acquisition of US-based Hartmarx Corporation (HMX)'s select assets at a deal value of about US\$ 120 million.

### M&A scenario — details

Period: January 1, 2009 to November 30, 2009	
Deal type	No of deals
Domestic	5
Outbound	1

Source: Bloomberg

Sources: "Factsheet on FDI," Department of Industrial Policy and Promotion (DIPP) website, [www.dipp.nic.in](http://www.dipp.nic.in), accessed 8 January 2010; "The Hartmarx Corporation acquisition," SKNL website, [www.sknl.co.in](http://www.sknl.co.in), accessed September 2009

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## Policy and regulatory framework ... (1/7)

The Ministry of Textiles is responsible for policy formulation, planning, development, export promotion and trade regulation in the textile sector. This includes all natural and manmade cellulosic fibre used to make textiles, clothing and handicrafts.

**National Textile Policy, 2000** — the policy was introduced for the overall development of the textiles industry.

The key areas of focus include

- Technological upgrades
- Enhancement of productivity
- Quality consciousness
- Strengthening of raw material base
- Product diversification
- Increase in exports and innovative marketing strategies
- Financing arrangements
- Increasing employment opportunities
- Integrated human resource development

## Policy and regulatory framework ... (2/7)

**Technology Mission on Cotton (TMC), 2000** — the scheme was introduced to address concerns around cotton production and processing sectors and to place the cotton economy on a sound footing. It was initially to be phased out at the end of the Tenth Five Year Plan (2002–07). However, the scheme's Mini Mission – iii and iv has been further extended into the Eleventh Plan for two years to accomplish targets.

**National Jute Policy, 2005** — the objective of the policy is to develop the jute industry and ensure high quality production, maximum employment and substantial contribution to economic growth.

## Policy and regulatory framework ... (3/7)

### Jute Technology Mission (JTM), 2006

The objectives of this programme include

- Improving the yield and quality of jute fibre
- Strengthening existing infrastructure for the development and supply of quality seeds
- Improving the quality of fibre through better methods of retting and extraction technologies
- Increasing the supply of quality raw material to the jute industry at reasonable prices and developing efficient market linkages for raw jute.
- Modernising, upgrading technology, improving productivity, diversifying and developing human resource for the jute industry
- Developing and commercialising innovative technology for the diversified use of jute and allied fibre

## Policy and regulatory framework ... (4/7)

### Development of mega cluster schemes

- Comprehensive Powerloom Cluster Development Scheme (CPCDS)
- To assist entrepreneurs to set up world-class units with modern infrastructure, latest technology and adequate training and human resource development (HRD) inputs along with appropriate market linkages.
- Comprehensive Handloom Cluster Development Scheme (CHCDS)
- Formulated to address the challenges faced by weavers within the cooperative sector and outside, due to poor infrastructure in some clusters.
- Comprehensive Handicrafts Cluster Development Scheme (CHCDS)

## Policy and regulatory framework ... (5/7)

### Technology Upgradation Fund Scheme (TUFS), (2007–2012)

TUFS was commissioned in 1999, initially for a period of five years, with the objective of modernising and upgrading the textiles industry by providing entrepreneurs credit at reduced rates. The scheme has now been extended until 2012 based on its positive impact on the investment climate for the Indian textiles industry.

#### Benefits of the scheme

- A 5 per cent interest reimbursement of the normal interest charged by the lending agency on rupee term loan, or
- A 5 per cent exchange fluctuation (interest and repayment) from the base rate on foreign currency loan, or
- A 15 per cent credit-linked capital subsidy for the SSI sector, or
- A 20 per cent credit-linked capital subsidy for the powerloom sector, or
- A 5 per cent interest reimbursement plus a 10 per cent capital subsidy for specified processing machinery

## Policy and regulatory framework ... (6/7)

The textile industry segments eligible to avail concessional loans for technology upgrade requirements include

- Spinning, cotton ginning and pressing
- Silk reeling and twisting
- Wool scouring and combing
- Synthetic filament yarn texturising, crimping and twisting
- Manufacturing of viscose filament yarn (VFY) or viscose staple fibre (VSF)
- Weaving or knitting including non-wovens and technical textiles
- Garments, made-up manufacturing
- Processing of fibre, yarn, fabric, garments and made-ups
- Jute

## Policy and regulatory framework ... (7/7)

### Other government initiatives

#### Scheme for Integrated Textile Parks, 2005

The scheme was introduced to neutralise the weakness of fragmentation in the various sub-segments of the textiles value chain and the unavailability of quality infrastructure.

- The Eleventh Five Year Plan (2007–2012) outlay for the textiles and apparel sector has been fixed at US\$ 2.91 billion (INR 140 billion), which is almost four times the outlay fixed during the Tenth Plan — US\$ 0.74 billion (INR 35.8 billion).
- FDI up to 100 per cent is allowed in the textiles sector through the automatic route.

*Source:* Ministry of Textiles.

*Source:* Eleventh Five Year Plan (2007–2012), Planning Commission.

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## Opportunities ... (1/2)

- According to the Confederation of Indian Textile Industry (CITI), the potential size of the Indian textiles industry is expected to reach US\$ 110 billion by 2012.
- Private sector participation in silk production  
The Central Silk Board has set a target of 26,000 tonnes of raw silk production by 2011–12. It has also proposed to enlarge the area under mulberry silkworm food plants to 0.25 million hectares, which is expected to produce an additional 6,400 MT of mulberry raw silk and increase employment. To achieve these targets, alliances with the private sector, especially major agro-based industries in both pre-cocoon and post-cocoon segments, is being encouraged.
- Technical textiles  
The textiles industry complements the growth of several industries and institutions such as the defence forces, railways and government hospitals, which are the key institutional buyers of technical textiles. The packtech segment constitutes 38 per cent of the total technical textiles production in India (2007–08). This industry includes the production of flexible packaging material for industrial, agricultural and consumer goods. Among the other segments, protech, oekotech, sportech and geotech have significant growth potential.

Sources: Eleventh Five Year Plan (2007–2012, Planning Commission, Volume 3, p. 116, Annual Report 2008–09, Ministry of Textiles; Domestic technical textiles industry, Ministry of Textiles.

## Opportunities ... (2/2)

- Retail sector

With consumerism and disposable income on the incline, the retail sector has witnessed rapid growth in the past decade. Several international retailers are also focussing on India due to its emergence as a potential sourcing destination.

- Centres of Excellence (CoE) for research and technical training

The GoI has proposed the establishment of several CoEs for training the workforce in the textiles sector. Four CoEs have been identified for four thrust segments of technical textiles — geotech, meditech, protech and agrotech. These CoEs, with national and international accreditation, are aimed at creating facilities for testing and evaluation and developing resource centres and facilities for training.

*Sources:* Ministry of Textiles 2008–09 annual report; “Baseline Survey of the Technical Textiles Industry of India,” Office of the Textiles Commissioner, 2009.

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## Industry associations ... (1/2)

Name	Address	Contact person	Telephone	E-mail
Ahmedabad Textile Industry Research Association (ATIRA)	P.O. Ambawadi Vistar Ahmedabad, 380 015, Gujarat	Dr M M Gharia Director	91-79-6304671, 91-79-6302672, 91-79-6301673	<a href="mailto:atira@adl.vsnl.net.in">atira@adl.vsnl.net.in</a>
Bombay Textile Research Association (BTRA)	Lal Bahadur Shastri Marg Ghatkopar (West) Mumbai – 400 096, Maharashtra	Dr A N Desai Director	91-22-5002766, 91-22- 5003651/2652	<a href="mailto:btra@vsnl.com">btra@vsnl.com</a>
South India Textile Research Association (SITRA)	Post Box No 3205 Coimbatore Aerodrome Post Coimbatore – 641 014, Tamil Nadu	Dr Arindam Basu Director	91-422-574367- 9, 91-422- 592481, 91-422- 579240	<a href="mailto:sitra@vsnl.com">sitra@vsnl.com</a>
Northern India Textile Research Association (NITRA)	Sector 23, Raj Nagar, Ghaziabad, Uttar Pradesh – 201 002	Dr J Venkat Rao Director	91-120-4783638, 91-120-4783586	<a href="mailto:nitra@nde.vsnl.net.in">nitra@nde.vsnl.net.in</a>
The Synthetic and Art Silk Mills Research Association (SASMIRA)	Sasmira Marg, Worli, Mumbai – 400 025 Maharashtra	Dr M K Bardhan Director	91-22-4935351- 52, 91-22- 4938753-54	<a href="mailto:sasmira@vsnl.com">sasmira@vsnl.com</a>

## Industry associations ... (2/2)

Name	Address	Contact person	Telephone	E-mail
Man-made Textile Research Association (MANTRA)	Near Textile Market Telephone Exchange, Ring Road, Surat – 395 002, Gujarat	Mr S K Basu Deputy Director	91-261-8323211, 91-261-8337062	<a href="mailto:director@mantrasurat.org">director@mantrasurat.org</a>
Indian Jute Industry's Research Association (IJIRA)	17, Taratala Road, Kolkata – 700 088, West Bengal	Col Amitava Poddar Acting Director	91-33-66269200/ 91-33-9229/9241	<a href="mailto:ijiraweb@ijira.org">ijiraweb@ijira.org</a>
Wool Research Association	K Mahatma Phule (Akbar Camp) Road, P.O. Sandoz Baug, Kolshet Road, Thane Mumbai – 400 607, Maharashtra	Dr M K Bardhan Director	91-22-25314294/ 91-22-25314304	<a href="mailto:wra@vsnl.com">wra@vsnl.com</a>

Source: Ministry of Textiles website, [http://ministryoftextiles.gov.in/tex/aboutus/tex\\_09.htm](http://ministryoftextiles.gov.in/tex/aboutus/tex_09.htm), accessed 14 January 2010.

## Note

Wherever applicable, numbers in the report have been rounded off to the nearest whole number.

Conversion rate used: US\$ 1 = INR 48

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