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INDIAN TEXTILE INDUSTRY GROWTH AND DEVELOPMENT OPPORTUNITIES AND CHALLENGES OF COIMBATORE REGION

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ABSTRACT

Coimbatore is well known for its textile industries, engineering firms, automobile parts manufacturers, health care facilities, educational institutions and pleasant weather. It is the second largest city in Tamil Nadu and one of the fastest growing cities in India situated near foot hills of Nilgiris. Coimbatore is known as Manchester of South India. Now, most of the Indian Software companies have started their development centers in Coimbatore. 76% of India's total textile market is from Erode (Tex-City or Loom-City of India) and 56% of knitwear exports come from Tirupur. Coimbatore has a lot of opportunities in the future with the availability of chief labour, land, water and other raw material facilities etc. Coimbatore industry has become strong and is experiencing strong cyclicity, persistent pressure across the country overall lessening in price due to overcapacity and huge competition. It is getting good reputation in the global markets, rising SME's, attracting more FDI, exports etc. This research concentrates on the growth and development of Indian Textile Industry particularly in Coimbatore region. Further it discussed about the south Indian textile industry opportunities and challenges.

KEYWORDS

Coimbatore region, Textile, Growth, GDP.

INTRODUCTION

Indian economy is the ninth largest in the world on the basis of GDP, fourth largest one in terms of Purchasing Power Parity (PPP per capita is \$3586 in 2010 as per IMF 129th) and it is highly dependent on agriculture and around 52% of employment opportunities are available in agriculture and its allied sectors. Indian economy has strong economic growth on the basis of GDP, Exchange Reserve, export and import, agriculture, industrial and service sector etc, even though Gandhi contended that one country's economy is more dependent on agriculture and rural economy. Indian Textile Industry is one of the leading textile industries in the world. A few years back, it was largely an unorganized industry, but the sector assumed much significant changes in the backdrop of the liberalization of Indian economy in 1991. The liberal policies have provided much impetus to the Indian textile industry, which has now successfully emerged as one of the largest export industries at the global level. This industry heavily depends upon textile manufacturing firms. Next to agriculture, textiles play a major role in the country's economy in terms of exports.

REVIEW OF LITERATURE

Sudesh Kumar (2005) deals with the trend and development of SSI clusters and financing of SSIs. He carried out his study in Tirupur cluster, focusing on the reasons for its sickness and policy implications of government of India. Virambhai (2010) textile industry productivity and financial efficiency focused on industry's current position and its performance. It concluded the company/management should try to increase the production, minimize the cost and operating expenses, exercise proper control on liquidity position, reduction of power, fuel, borrowing funds, overheads, interest burden, etc. Nartlada (2009) investigated on the Strategic alliance & internationalization of SMEs. It found the problems from global competition and provided critical insights into the firm's strategy & challenges. Venu (2008) influence of technology adoption on Indian apparel manufacturing firms and its effect of organizational factors and competitive advantage are discussed. This study builds a knowledge base of the technology adoption in apparel manufacturing and influential factors in developing countries. Vanita Tripathi (2007) poor perform sectors, commented their peculiar features and growth, and pointed out that profitability and performance vary over time. It concluded, that large scale sector is effectively running in to Indian stock market with high premium, which are unprofitable to small scale firms. Abhijit & kaivan (2002) highly supported to the community people were participating and developing the investment of pattern of long term performance and argued that the investment difference can't be explained by productivity differences alone. Mogens et.al (2011) analysed the manufacturing firms with innovative activities, general characteristics of a firm, corporate governance, and industry competition level and market approach. He concluded that the innovation is influenced by networking activities; access of financial resources, firm's export orientation strategy, growth potentials and age of the firm and that the firm size does not influence the decision of innovation.

STATEMENT OF THE PROBLEM

In India, most of the ministries seek to develop and create sector growth and establishment, special economic zone etc, only on the capital city of the state, not other undeveloped areas. Chennai is the capital city of Tamil Nadu and has the largest population and is the most industrialized area. It has high density of population after Mumbai, Kolkata. Here, researcher seeks to find out a research gap as compared with the capital city of Chennai, Coimbatore is the well established and best in the agricultural cultivation area. As per Gross State Domestic Product (GSDP), the domestic (city) economic growth is highly concentrating on metropolitan city and not other places.

OBJECTIVES OF THE STUDY

The main objective of the study is to explore the growth and development of Indian textile industry and to identify the opportunities and challenges of Coimbatore textile region in south India.

METHODOLOGY

This study is conducted based on secondary data and theoretical information collected from the various journals, articles, reports, books, magazines, website etc, from the study period of 2011 to 2012.

SOUTH INDIAN ECONOMY

South Indian economy is highly dependent on agricultural and its related industrial areas. In this "Promised Land" the products of rice, sorghum, ragi and others products like areaca, coffee, pepper, cardamom, and tapioca are widely cultivated in the Nilgiri hills and Kodagu. Northern Karnataka, Rayalaseema and Telangana (economy of south India) regions have the recurrent droughts. As a result of this, farmers are selling their livestock in the market as well as they are debt-ridden. Sometime they tend to commit suicide in extreme condition. South India is a gateway to South. As per the Ministry of IT (Information Technology), after Bangalore (Silicon Valley of India), Chennai (Technological Park) and Hyderabad (Hi-Tech City), IT industries are concentrated more in Coimbatore. Chennai is famous for the automobile industry. 65% of heavy vehicles in India are manufactured in Chennai. Madurai region are producing 35% cotton in Tamil Nadu, Tirupur and Erode are the largest producer of cotton vests in India and it is called as "textile valley of India" as it is exporting more to the South East Asian countries. Erode is the Asia's largest market for turmeric. Kerala is one of the largest tourist visitor places and is receiving foreign reserves. Further it is the best in human development index and is highest rank in terms of literacy rate in India. Tamil Nadu is the second largest industrialized state (Second state after Maharashtra) in south India and fifth largest economy in India as per state Domestic product. It ranks third in FDI approvals after Delhi and Maharashtra. State investment constitutes 9.12% of the total FDI in India. Chennai is the second largest software exporter (Software development centre more than 25000 professional) of India and it is known as Health Capital of India and Banking Capital of India. Further, World Bank called it as Detroit of Asia as per attractive place for International corporations. It has a 110 industrial parks and estates, bio-technological park and agro export zones etc.

TEXTILE INDUSTRY

World textile was started in Britain as the spinning and weaving machines were invented in there. In recent years, the production of wool, cotton and silk all over the world has increased. Though this industry was started in the UK in the 19th century after the mechanization process, the textile production shifted to the Europe and North America. Periodically Japan, China and India took part in industrializing their economies and concentrated more on the development of this sector. Japan, India, Hong Kong and China of late are the leading producers because of their cheap labour supply and material, which are the important factors (Retrieved from www.economywatch.com).

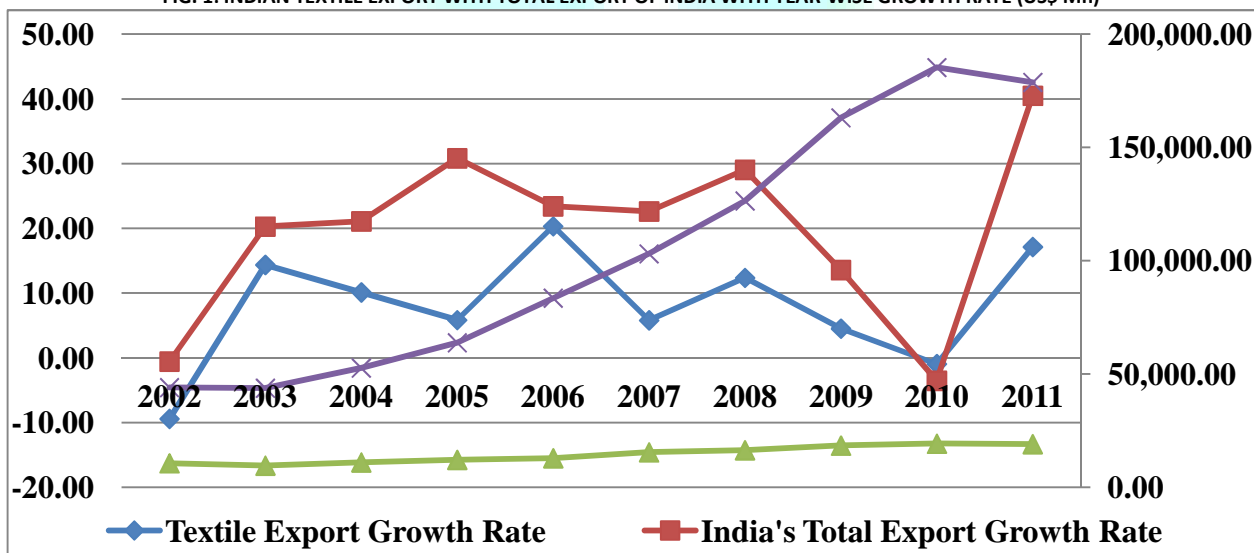
INDIAN TEXTILE INDUSTRY

Indian textile history is very old. India was famous in the 16th century for its textile exports, especially export from Gujarat. During the British period, the East India Company took control over foreign trade. The first Indian cotton cloth mill was established in 1818 at Fort Gloaster, near Kolkata. This mill failed to cater to the demands of the country and the second mill established in 1854 and KGN Daber had laid the foundation for modern cotton industry. It had been named as Bombay Spinning and Weaving Company. This Industry can be basically categorized into two segments: Organized and Unorganized. Unorganized textile industry is the largest in terms of numbers and it utilizes the traditional practices (Weaving and Spinning) in cloth production and hence is labour intensive in nature. Unorganized industry is characterized by the production of clothes either through weaving or spinning with the help of hands. Further, another important feature is that this industry is naturally considered as a decentralized one. It comprises three major segments viz., power loom, handloom, and hosiery. Apart from this, there are readymade garments, khadi, as well as carpet manufacturing units in the decentralized sector. Organized sector constitutes another half of the Indian textile industry with the immense importance given to capital intensive production process. This represents spinning/composite mills like spinning and weaving and processing facilities carried out under the same roof. This sector is characterized by sophisticated mills where technologically advanced machineries are utilized for mass production of textile products.

IMPORTANCE OF INDIAN TEXTILE INDUSTRY

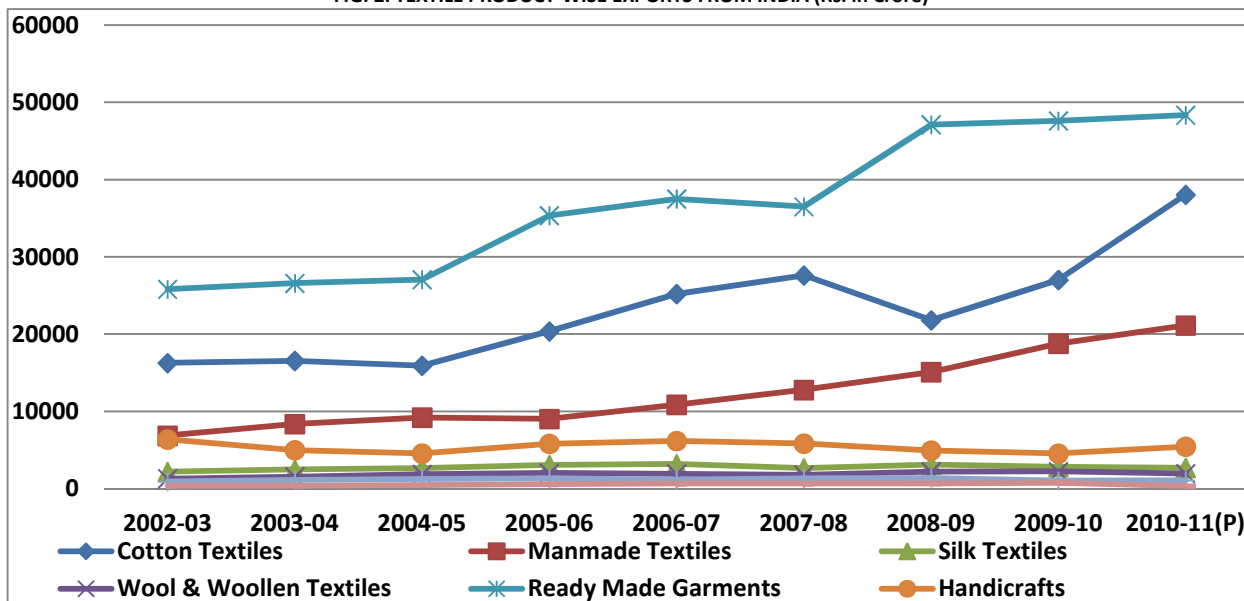
Indian textile industry is the second largest industry in the world after China and it is self reliant and independent industry and has greater diversification and versatility. One of the main objectives of the Eleventh Five Year Plan was to accelerate GDP growth from 8 to 10 percent and then maintain it at 10 percent as well as to increase the energy efficiency by 20 percent points in the Twelfth Five Year Plan in order to double the export income by 2016-17. As per AEPC, currently this industry contributes nearly 3 to 4 percentages to GDP; Next to agricultural sector, it generates employment for more than 35 million people and excise collections nearly 9 percent and it contributes to 16 percent share of the country's export. About 27 percent of the country's foreign exchange comes from the textile exports. It contributes to nearly 14 percentage of the total industrial production of the country.

FIG. 1: INDIAN TEXTILE EXPORT WITH TOTAL EXPORT OF INDIA WITH YEAR-WISE GROWTH RATE (US\$ Mn)



The forecast is that textiles exports will reach USD 35 billion by 2012. In the international market, India is the largest exporter of yarn and has 25% share in the world cotton yarn export market besides contributing to more than 12% of the world's production of textile fibers and yarn. While the Europe continues to be the India's major export market with 22% share in textiles and 43% in apparel, the US is the single largest buyer of Indian textiles and apparel with 10% and 32.6% share respectively. Other countries in the export list include the UAE, Saudi Arabia, Canada, Bangladesh, China, Turkey, and Japan. Spindleage has 23% share in the world spindle capacity, including handlooms with 61% in the world loom age. Garment/Apparel industry holds 12% of the country's total export and it is one of the largest foreign revenue contributors. According to AEPC advantages of India-fact sheet, India is the largest producer of jute products, second largest producer of silk and Cotton Yarn, second largest producer of cellulosic fibre/yarn, third largest producer of raw cotton, and fourth largest producer of synthetic fibers/yarn. India's textile export has increased from Rs. 48676.6 crores in the year 2001-02 to Rs. 106216.4 crores in the year 2010-11 (RBI Data).

FIG. 2: TEXTILE PRODUCT-WISE EXPORTS FROM INDIA (Rs. in Crore)



TAMIL NADU TEXTILE INDUSTRY IN COIMBATORE

Coimbatore is well known for its textile factories, engineering firms, automobile parts manufacturers, health care facilities, educational institutions and pleasant weather. It is the second largest city in Tamil Nadu and the fastest growing cities in India situated near the foot-hills of Nilgiris. Aluminium castings form major exports from Coimbatore according to Irular Tribal Chief Kovan and his clan (TEA-India). They are the earliest settlers and founders of Kovanpatti as a part of kongunadu. Later its surrounding forests were cleared and formed a new village called Kovanputhur. Coimbatore is called as Manchester of South India. Now, most of the Indian Software companies have started their development centers in Coimbatore. 76% of India’s total textile market is from Erode (Tex-City or Loom-City of India) and 56% of knitwear exports come from Tirupur. Tamil Nadu is one of the most important industrialized states in the country and the fifth largest economy in India at present on the basis of state domestic product at current prices (US\$ 36.78 bn) as well as exports (US\$ 5.5 bn). It is the eleventh largest state in India by area and the seventh most populous as well as the third largest India’s GDP contributor (Porter and Niels). As per Census-2005, this state’s economy largely depends on industries and agriculture. It has the highest number of business enterprises (10.56%) and stands second in total employment (9.97%) in India. Share of manufacturing sector in Tamil Nadu is 34%, services sector 45% and agriculture 21%. Among manufacturing industries, Textile, leather, Electronics, software, auto components, pharmaceuticals, etc are more in Tamil Nadu. The high Foreign Direct Investment (FDI) in Tamil Nadu is mainly on account of the following reasons- investment local administration, good railways, port and telecom network, adequate road connectivity and availability of low cost labour throughout the state. The state is also well known for its textile industries. The Madura Coats and Binny Mills were established by John Binny in 1876. Coimbatore, Madurai, Dindigul and Tirupur are the hub centers of Tamil Nadu textile business. Lakshmi Mills in Coimbatore was the first to come up in 1910, followed by Chandra Textiles, Gomathy Mills, GVG Textiles and KPR Mills.

TEXTILE INDUSTRY IN TAMIL NADU

TABLE 1

Item	All India	Tamil Nadu
Spinning Sector		
No. of Spinning Mills	3069	1889
Employment (in Lakhs)	8.94	2.40
Spindles (in Million)	39.27	18.92
Power loom Sector		
Power looms (in Lakhs)	19.03	3.66
Employment (in Lakhs)	47.57	9.14
Handloom Sector		
Handlooms (in Lakhs)	34.86	4.13
Weavers (in Lakhs)	65.50	6.08
Handloom Cloth Production (Billion. Sq. Mt)	6.00	0.70
Value (Rs. in Crores)	18000	17000
Other Sector		
Power Processing Units	2510	985
Hand Processing Units	10397	2614
Knitwear and Garment Units	8000	4000

Source: investingintamilnadu.com

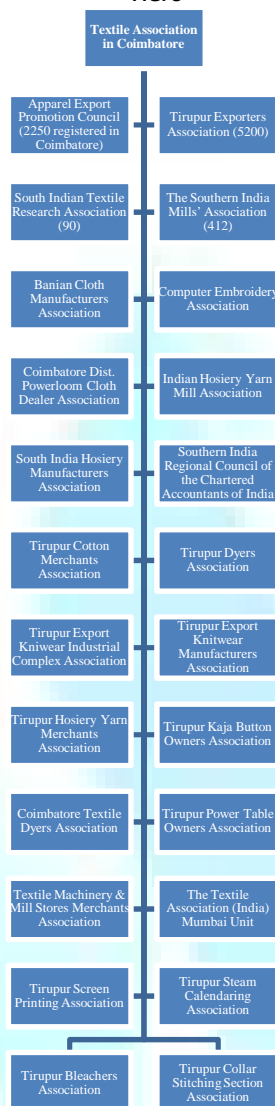
TABLE 2: FOREIGN TRADE THROUGH TAMIL NADU PORTS BY AIR AND SEA 2008-09

Description			Value of Foreign Trade (Rs. in Cr)	
			Tamil Nadu	All India
Exports	By Sea	81620	90603	645572
	By Air	8983		
Imports	By Sea	194052	230987	1090182
	By Air	36935		
Grand Total			321590	1735754

Source: DGCI&S, Kolkata and DES, Chennai-6.

Tamil Nadu alone has 47% of total spinning capacity in the country and accounts for more than 40% of yarn exports from India. **Tirupur and Coimbatore** manufacturing knitwear garments export with a ton of Rs.11000 Crores per annum. There are around 4000 knitwear and woven garment production units in the State, providing employment to around five lakhs peoples (available at: www.investinginTamilNadu.com).

FIG. 3



Tirupur is an important trade centre of India and it is famous for knitted garment wear. Tirupur is a textile district of Tamil Nadu and it is popularly known as 'Banian City' or 'Knit City'. It is located 50 Kilometers from the east of Coimbatore district (**Manchester of South India**) and has a population of around 10 lakhs. Tirupur is a major source of foreign exchange for the country because of its exports. It has gained universal recognition as the leading source of Hosiery, Knitted Garments, Casual wear and Sportswear. The first knitwear unit was set up in 1925 and the growth of the industry was slow till late 1930s. Knitting was brought to this city by Gulam Kadar in 1937 who established "**Baby Knitting Industries**" in Kaderpet area of Tirupur. Subsequently, it emerged as the prominent centre for knitwear in South India by 1940s. In 1942, 34 units were engaged in the production of knitwear and composite mills and operations like bleaching and dyeing were located in the larger units. By 1961, the number of units had risen to 230 and the industry catered only to the domestic market till early 1970s. It was in 1980s that the export market began to expand and afterwards Tirupur emerged as the largest exporter of cotton knitwear in the country. Of late, more number of SME (Small and Medium Enterprises) and large scale enterprises are functioning in different forms of textile productions in and around the city producing 145000 tons of fabric annually. It provides employment to over 400000 people and accounts for more than 90 per cent of India's cotton knitwear export worth an estimated US\$ 1 billion per annum. The below chart showing the evidence of high-technology are gradually catching up to the national benchmark.

FIG. 4: STATE-WISE ENERGY CONSUMPTION BY TEXTILE INDUSTRY (1 MW&ABOVE) IN SOUTH INDIA

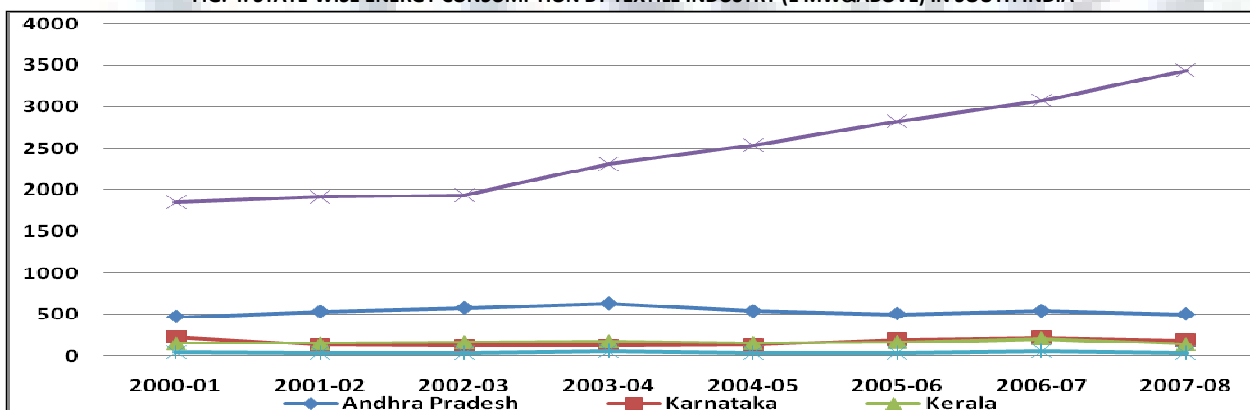
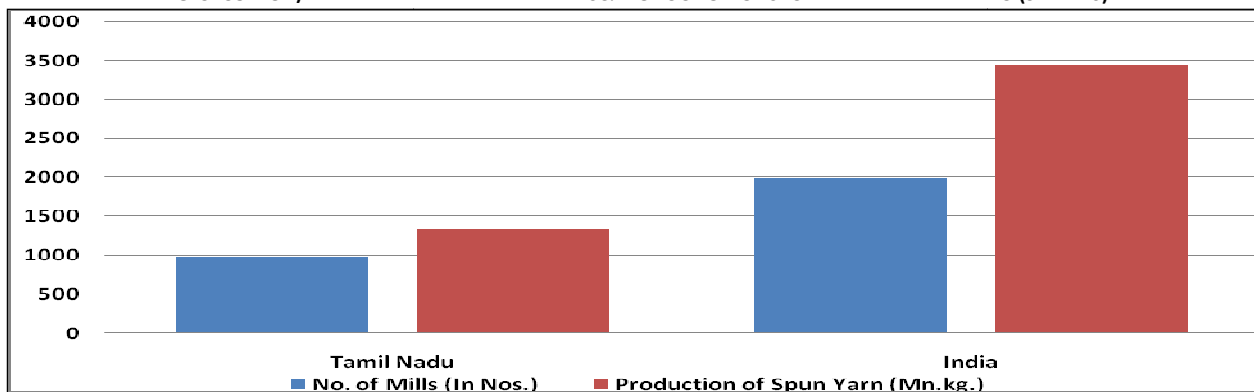


FIG. 5: COTTON/MAN-MADE FIBRE TEXTILE MILLS&PRODUCTION OF SPUN YARN IN TAMILNADU (31.12.10)



OPPORTUNITIES AND CHALLENGES

This Coimbatore city has lot of opportunities because of the cultivation area with sophisticated water facilities, chief land and labour etc. Coimbatore industry has become a tough industry and is experiencing strong cyclicality, persistent pressure across the country overall lessening in price due to overcapacity and huge competition. It has got a good reputation in the global markets, rising SME's, attracting more FDI, exports etc. Coimbatore is in much better position in manufacturing of consumer, industrial & economical products with good entrepreneurship compared to its other peers/like industrial area of Delhi, Rajkot, Ludhiana, Jalandhar, Ahmadabad etc. Indian textile manufacturing industries are ready to meet the competitive product equal to the price with high speed of sophisticated machine. E-business provides exclusive opportunities for enterprises to exchange goods and services between domestic as well as foreign countries with lot of FDI, exchange reserves etc. it's becoming a preferred IT destination with the city having several software parks, Special Economic Zones, education, health care, and other development centers also, further this city being a gateway to the other states. Coimbatore stock exchange limited is acting as linkages between investors and the textile industry. Recently CII study rated "Fourth investor friendly city in India" and it's globally competitive for the industry of engineering, auto components, motor pump sets etc.

It is facing the challenges such as environmental issues and land pollution, child labour, factory background issues, unexpected loss, volatility on price of raw materials, threat of large scale industry, handling the slowdown etc. Threats such as domestic and international market competition need to improve the working conditions of the people who are involved in this profession and need to revamp consumer realization. Further, this textile region altering as a particular Gounter community oriented owners for these industrial parks, making slaver and creating them as a working community till death. Abhijit&kaivan brought out more than 65% of the Gounders occupying this industry & playing a substantial role of community identity in those region with the help of child labour. Plus he was wrongly mentioned communal investment is must & helped to function the capital market with their earlier long term performance. This report shows & helps to favourable of particular community people and not to all. Government should stop and encourage other undeveloped people by providing small and medium scale enterprises loans and schemes at different level. Supremacy of the small scale sector having the disjointed structure, shipping cost, high power cost, rising interest rate, transaction cost with distant labour. Further FDI are not coming highly to develop this industry as a good position, even though foreigners are not ready to invest this sector because the reason of meeting the loss continuously by few firm. Indian government is recently turning to avoid the bottlenecks, which delay its development. Whatever may be, in the recent time technology playing a lead role in its processed industry as well as maintaining their quality, with innovative products in the competitive world, at this moment Indian industry are facing this problem highly.

RECOMMENDATIONS

1. Creation of Textile-oriented Special Economic Zones
2. Government should take care for the development of apparel parks and small and medium scale enterprises also
3. Indian industry should improve their textile technology with high-tech innovation, management & negotiating skills, soft skills, product design and packaging etc.
4. Liberalized SEZ need to be implemented with tax, labor laws and other benefits.
5. Multi-facility transport (Road, Train and Airports)
6. Quality maintenance and cost-effective manpower etc.
7. Start up new courses on Textile manufacturing and its technology in various institutions with lot of attraction and students involvement

CONCLUSION

The study covered the textile industry of Coimbatore region. Therefore, the findings could not be generalized to the entire country. This research is fully theoretical oriented and not quantitative, therefore researcher cannot prove with the data. India has the strong economic background and the second largest exporter of textile and apparel products in the world-wide after china. India players to strengthen relationships with global traders and quality output easily facing Chinese competitors. Coimbatore region and its near district of Erode, Tirupur, Salem are getting good growth and development for the quality and quantity as well as low cost. In future it may attain first position in India's textile industry production and highest exports.

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ANNEXURE

TABLE 3: INDIAN TEXTILE EXPORT WITH TOTAL EXPORT OF INDIA WITH YEAR-WISE GROWTH RATE (US\$ Mn)

Year	Textile Export (US\$ Mn)	India's Total Export (US\$ Mn)	Textile Export Growth Rate	India's Total Export Growth Rate
2001-02	10,693.60	44,075.53		
2002-03	9,688.57	43,826.72	-9.40	-0.56
2003-04	11,081.14	52,719.43	14.37	20.29
2004-05	12,204.63	63,842.55	10.14	21.10
2005-06	12,918.49	83,535.94	5.85	30.85
2006-07	15,545.04	103,090.53	20.33	23.41
2007-08	16,448.35	126,414.05	5.81	22.62
2008-09	18,483.66	163,132.18	12.37	29.05
2009-10	19,323.82	185,295.36	4.55	13.59
2010-11	19,142.83	178,751.43	-0.94	-3.53
2011-12	22,423.93	251,135.89	17.14	40.49

Source: DGCI, Kolkata

TABLE 4: TEXTILE PRODUCT-WISE EXPORTS FROM INDIA (Rs. in Crore)

Items	Cotton Textiles	Manmade Textiles	Silk Textiles	Wool & Woollen Textiles	Ready Made Garments	Handicrafts	Jute	Coir & Coir Manufactures
2002-03	16267.77	6859.97	2184.13	1303.52	25815.4	6378.14	907.77	355
2003-04	16542.24	8368.83	2505.31	1553.07	26589.13	4987.36	1113.98	357.37
2004-05	15924.43	9214.25	2671.46	1874.07	27069.07	4555.37	1241.25	474.29
2005-06	20369.27	9029.9	3069.39	2018.52	35358.49	5819.89	1311.63	590.37
2006-07	25197.2	10863.39	3196.89	1919.36	37506.16	6181	1178.39	660.25
2007-08	27599.81	12785.02	2646.75	1783.13	36497.79	5844.12	1319.36	644.87
2008-09	21795.4	15090.76	3107.78	2199.49	47112.77	4949.23	1375.78	680.7
2009-10	27016.21	18783.13	2819.46	2224.14	47608.39	4548.91	1042.5	759.48
2010-11(P)	38038.19	21125.13	2708.02	1955.31	48355.57	5445.45	1082.85	832.81

Source: Ministry of Textile, Govt. of India

TABLE 5: COTTON/MAN-MADE FIBRE TEXTILE MILLS&PRODUCTION OF SPUN YARN IN TAMILNADU (31.12.10)

State	No. of Mills (In Nos.)	Production of Spun Yarn (Mn.kg.)
Tamil Nadu	990	1349.7
India	2000	3448.6

Source: Lok Sabha Unstarred Question No.865, dated on 25.02.2011 & Indiastat.com

TABLE 6: STATE-WISE ENERGY CONSUMPTION BY TEXTILE INDUSTRY (1 MW&ABOVE) IN SOUTH INDIA

Year/States	Andhra Pradesh	Karnataka	Kerala	Tamil Nadu	Pondicherry	Southern India	India
2000-01	472.39	236.37	156.47	1850.25	43.27	2758.8	8065.2
2001-02	535.79	134.59	156.97	1915.01	39.91	2782.3	7877.4
2002-03	580.41	124.2	170	1939.34	39.49	2853.4	8147.1
2003-04	629.25	128.95	179.87	2315.67	56.11	3309.9	8230.9
2004-05	541.15	140.71	162.28	2537.28	37	3418.4	8619.6
2005-06	505.05	200.98	173.95	2829.25	41.28	3750.5	9261
2006-07	543.86	221.32	212.42	3080.64	60.37	4118.6	9849.4
2007-08	501.65	193.92	147.91	3442.24	37.91	4323.6	9860.8

Source: Indiastat.com

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