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MAKE IN INDIA: PROSPECTS AND CHALLENGES FOR TEXTILE AND APPAREL INDUSTRY OF RAJASTHAN

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ABSTRACT

Make in India initiative in the textile and garment industry offers investment opportunities for foreign companies and entrepreneurs are available across the entire value chain of synthetics, value-added and specialty fabrics, fabric-processing set-ups for all kinds of natural and synthetic textiles, garments and retail brands. The stress is placed on skill development, especially in new areas like medical textiles, geo-synthetics, technical textiles, nonwoven industry and organic textiles. Textile is an important industry for Rajasthan, representing over 20 per cent of the investment made in the state. The key factors responsible for development of textile industry in Rajasthan are availability of cotton and wool, skilled and unskilled manpower and low cost of production. But the state will have to proactively work on various challenges regarding Man, Machine and Management, to realise its full potential. Since the textile industry of Rajasthan plays significant role in creating employment, generating a substantial industrial output and bringing revenue through export of garments and other textile products, inviting investors through a platform like "Make in India" can be beneficial. It also promises to amplify marketability of khadi and other handloom products thus providing employment, boosts the economy and sustains indigenous artisans.

KEYWORDS

brand promotion, handloom, make in India, skill development, technology.

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INTRODUCTION

ake in India is a program designed and initiated by the government of India to promote India as a "Global Manufacturing Destination", facilitate investment, foster innovation, and build best-in-class manufacturing infrastructure. The textile and apparel industry proves to be a promising sector as India is projected to have the youngest workforce in the world until 2050, while the rest of the world, including China, will be ageing. This campaign is embarked to galvanize the manufacturing sector of the country and to increase the inward investment. It aims at pushing manufacturing growth to over 10 per cent annually through sustained measures of deregulation and delicensing of industry and making India more accessible to investors.

OBJECTIVES OF THE STUDY

- 1. To find out the challenges in implementing Make in India campaign in textile and apparel industry of Rajasthan.
- 2. To explore prospects of Make in India campaign for textile and apparel industry of Rajasthan.

RESEARCH METHODOLOGY OF THE STUDY

This study is a review of the Make in India campaign, especially in context of textile and apparel industry of Rajasthan. It peeps into the current status of textile and apparel production in Rajasthan – strength and problems in production and marketing, as well as challenges and prospects for the successful execution of Make in India campaign. Therefore, sources for secondary data collection were websites, censuses and reports, compendium and organisational records of various government departments, textile and apparel producers and marketers along with data from various journals and magazines that was originally collected for other research purposes. On the other hand, primary data was collected through personal interviews and meetings with the producers and dealers in the field of textiles and apparel production and marketing in Rajasthan accompanied with market surveys.

TEXTILE AND APPAREL INDUSTRY OF INDIA AND RAJASTHAN

The fashion and apparel industry is a prospective area in which investments can be expected since India offers 100 percent Foreign Direct Investment (FDI) in single brand retail and 51 percent in multi brand retail. The textile industry is currently one of the largest and most important industries in the Indian economy by way of significant contribution to GDP (4%), manufacturing output, employment generation and export earnings (12%)¹². The nation is also home to 24 percent of the world's spindle capacity and 8 percent of rotor capacity, along with a loom capacity (consisting of both handlooms and mechanized) of 63 percent, which is the highest in the world. Indian textile industry is also the second largest employment generating industry, after agriculture with direct and indirect employment of more than 95 million people⁴. It employs skilled and unskilled people, which make it extremely important from the prospective of —Make in India mission. This is a traditional, rich and well-established industry, enjoying considerable demand in the domestic as well as global markets¹⁵.

Textile industry in India basically consists of non-integrated medium, small and numerous micro ventures of spinning, weaving, finishing and apparel-making⁴. Such a structure arose due to the policies on tax, labour and other regulations that favoured small-scale, labour-intensive enterprises, while discriminating against large-scale, capital-intensive operations⁷. In view of the labour-intensive nature and de-centralised character, Indian textile industry is also in a position to make positive and meaningful contribution towards achieving the cherished objective of 'inclusive' growth.

Textile is an important industry for Rajasthan, representing over 20 per cent of the investment made in the state. Rajasthan contributes over 7.5 per cent of India's production of cotton and blended yarn and over 5 per cent of fabrics. Rajasthan has leading position in spinning of polyester viscose yarn & synthetic suiting and processing, printing & dyeing of low cost, low weight fabric. Besides, it manufactures wide range of products, ranging from handicrafts, synthetic and cotton textile yarn and garments¹⁴. The key factor favouring development of textile industry in Rajasthan is availability of cotton and wool in the state.

PROSPECTS OF "MAKE IN INDIA" FOR TEXTILE AND APPAREL INDUSTRY OF RAJASTHAN

Traditionally, Rajasthan has been a manufacturing state. A large number of textile craftspeople are still part of Rajasthan living heritage, practicing hand skills unmatched by any other country. They also have an extraordinary repertoire of motifs and designs going back generations and distinctive to each tradition. Weavers and spinners create textiles in hundreds of different techniques and traditions unique to each community and area - a cultural and economic strength whose full potential remains untapped and that still has a contemporary and global appeal. Rajasthan lies in its rich heritage and tradition of colour, creativity, craftsmen and centres which represent volumes of historic design traditions and unique textiles and techniques.

Rajasthan enjoys a comparative advantage in terms of skilled manpower and cost of production over other major textile producers, which makes the state a preferred destination for investment. Abundant availability of this key raw material has prompted many textile units to locate in the state. Make in India initiative provides investment opportunities for foreign companies and entrepreneurs across the entire value chain of synthetics, value-added and specialty fabrics, fabric processing set-ups for all kinds of natural and synthetic textiles, technical textiles, garments, and retail brands. Growing Indian economy and potential will lead to higher domestic demand and exports which requires large integrated set-ups and the industry should take the advantage of 'Make in India' focus.

There are ample opportunities for success of Make in India initiative in textile and apparel industry of Rajasthan:

- 1. LARGE AND EXPANDING DOMESTIC MARKET: The retail market of India is one of the most vibrant and fastest growing markets in the world due to high growth in per capita income. The growing Indian economy leads to higher domestic demand from household sector (60%), non-household sector (21%) and export sector (19%)¹². Increase in disposable income has doubled the domestic household expenditure on clothing from INR 1.08 lakh crores in 2004–05 to INR 2.06 lakh crores in 2010–11³. Investments in the textile and clothing sector have been growing at an average annual rate of 12%.
- 2. **INCREASE IN POTENTIAL DEMAND IN INTERNATIONAL MARKET: C**urrently, India is the largest exporter of yarn and the second largest exporter of fibres in the world along with significant presence in global markets for fabrics, garments and home textiles. In overall terms, India is next only to China in exports of textile products. In 2013, India became 2nd largest exporter of textile and apparel products globally and registered a higher growth rate of 9% against the global growth of 5% since 1995. Demands from foreign markets such as the US and EU are large and continue to dominate the sector. Emerging markets with potential demand include Canada, Australia, Japan, South Africa and the Middle East. Phasing of the quota regime and consequent improvement in market access will create fresh opportunity for textile and garment exports.
- 3. MASSIVE UNEXPLOITED POTENTIAL FOR THE DEVELOPMENT OF NEW TECHNOLOGY: The textile industry is undergoing a major reorientation towards non-clothing applications of textiles. Technical textiles are emerging industry with a great potential. There are enormous opportunities for production of technical textiles, medical textiles, geo-synthetics, organic textiles & nonwovens in textiles and apparel industry of Rajasthan. The only need is to focus on skill development and exhibitions to provide additional thrust for consumption of value added blended textiles and technical textiles.
- 4. **INVESTMENT OPPORTUNITIES IN INDIAN SYNTHETIC TEXTILE VALUE CHAIN:** The changing global scenario of synthetic textiles is leading the rise in demand and investment in this sector. Nearly 70% of world trade in textile products is currently based on MMFs. But the share of such products in our textiles exports is around 25%, that too mostly in yarn and filament fabrics. India needs to diversify into manmade fibre based products since the real growth in synthetic textiles triggering the investment opportunities in synthetic textile value chain of Rajasthan. FDI mainly comes in MMF category as it is technology-focused and there is substantial requirement of investment in this category.
- 5. **OPPORTUNITIES FOR TRADITIONAL TEXTILE AND APPAREL PRODUCTS:** Make in India initiative promises to provide immense opportunities in the area of rich legacy of textile production of Rajasthan. Khadi, handlooms and handicrafts are part of Rajasthan's history, economics, aesthetics and culture. Achieving inclusive growth by developing handlooms quality is improving and positioning Rajasthan in global handicrafts market. Textiles are literally a text and palimpsest of our past, present, and future. Handlooms are a part of India's history, economics, aesthetics and culture. If we lose them, we lose a part of ourselves. Virtually everyone was marvelling at the beauty and diversity of Indian textiles. Khadi is the only Indian feel-good fabric as it gives employment to thousands as well as boosts the economy and sustains indigenous artisans. Supporting khadi is one way of encouraging the talented artisan to live in his ancestral village rather than give up in despair and flock to an urban slum for an alternative employment.
- 6. **BRAND INDIA HANDLOOMS:** The ministry of textiles proposes to strengthen the visibility of handloom products by promoting Brand India Handlooms to revup their marketability and support the 'Make in India' campaign. Branding promises to amplify marketability of khadi and value-added handloom products of Rajasthan. Creating brand India is aimed to craft India as global fashion hub by 2024.
- 7. **AVAILABILITY OF LOW COST AND SKILLED MANPOWER:** Among all manufacturing industries, textile and apparel offers the biggest employment potential for the young generation. Rajasthan possesses a vast pool of low cost unskilled and skilled workers and technical-managerial personnel which provides competitive advantage to industry in terms of productivity, quality and cost to make Rajasthan truly, globally competitive. Traditionally, people seeking employment in the industry were among the poorest and least educated. As the global apparel and garment industry evolved along with consumerism, a high sense of quality, commitment and competition became an inherent part of the DNA. 'Make in India' policy initiative will create employment opportunities for young people entering the workforce, and this employment generated will also act as a multiplier on the services sector¹.
- 8. **AVAILABILITY OF ABUNDANT RAW MATERIAL:** Sourcing Strategies in the global brands and retail are shifting from cost to quality and environment, and from China to India, Bangladesh, Pakistan, etc. India is a preferred sourcing destination globally. Rajasthan enjoys strong multi-fibre raw material base, availability of large varieties of cotton and wool fibres and has a fast growing synthetic fibre industry that helps industry to control costs and reduces the lead-time across the operation together with very low import intensity.
- 9. **LARGE AND EXPANDING PRODUCTION CAPACITIES:** Supportive policy regime, increasing plan expenditure and generous incentives for investment and modernisation turns into growing capacity of production in the state. China is fast losing its cheap labour cost arbitrage and its overall production cost is also increasing rapidly. This would provide an opportunity for Rajasthan to grab a larger share of world trade in textiles.
- 10. **THE INITIATIVES OF RAJASTHAN GOVERNMENT:** The government is showing its concern to attract investments in textile industry by means of industrial infrastructure, special investment zone and investment opportunities in Rajasthan. The textile sector of Rajasthan would get top technology equipments, innovations, and quality via 'Make in India' campaign¹⁰. Foreign markets thrive on style and innovation the foreign markets thrive on style and innovation and the Rajasthan government wants to introduce these in a big way to make the state a gateway for handicrafts and textiles of Rajasthani handicrafts and textiles. The industrial policy of Rajasthan provides various incentives for industrial growth including subsidies, power concessions, land and building tax exemption, and special land package for IT industries. The state government has reserved one third of its developed industrial area for small and medium enterprises, which has led to many MSMEs set up their industrial houses in Rajasthan.
- 11. **THE INITIATIVES OF GOVERNMENT OF INDIA:** The Government of India wants to infuse the best in technology and innovation in the textile sector of Rajasthan to make the state a "one-stop and most-favoured destination" for investment. Government of India had already provided an enabling atmosphere by changing labour laws and offering concessions to attract investments It has provided an enabling atmosphere by changing labour laws and offering concessions to attract investments. The Indian Government is committed to providing 15 lakh jobs in the state in the next five years and the textile sector will continue to provide a major chunk of employment.
- 12. **UTILISING OTHER MARKETING OPTIONS:** Online marketing and e-commerce are two avenues offering big opportunity for the sector. Organising buyer-seller meet, involvement of retail outlets, associating domestic brands with online retailers, application of PPP model in selling through brand outlets and exports and linking handloom-handicrafts with tourism are good options to improve market access and reduction in lead-time. The increase in the number of retail industries and shopping malls with branded readymade garments and textiles amplifies the vistas further.

Textiles have been included as a thrust sector in Rajasthan Investment Promotion Scheme 2014. In the recently released rankings for EODB Rajasthan has been given 6th rank. Reserve bank has also ranked the state as 3rd in fresh investment after Andhra Pradesh and Orrisa. Thus, the state has three major feathers in its cap during the last few years. Rajasthan has modern textile manufacturing units as well as a wide variety of unique traditional textiles. The blend of traditional and modern can boost up the sector for its worldwide recognition.

CHALLENGES IN IMPLEMENTING "MAKE IN INDIA" CAMPAIGN IN TEXTILE AND APPAREL INDUSTRY OF RAJASTHAN

The post-ATC global market has not only opened a vista of opportunities but has also brought numerous challenges to execute make in India campaign in textiles and clothing industry of Rajasthan. The Indian T&C industry is not benefitted as was expected on account of plethora of challenges being faced by the sector, both in domestic and export markets⁷. The challenges to be addressed include:

- 1. **POOR INFRASTRUCTURE:** India's exceptional advantages and the expanding global market will boost the industry. But India will have to proactively work on various challenges to realise its full potential. Infrastructure tops the challenges. The textile industry in many states is facing shortage and erratic power supply, which translates to low productivity and higher manufacturing costs. Power cost is second only to raw material cost in manufacturing. The roads are pathetic, which means more hours to reach ports. On top of it, the turnaround time in ports is a lot higher than in many neighbouring countries that compete with India¹.
- TECHNOLOGICAL OBSOLESCENCE: The technological obsolescence pervading in almost all the segments of the textile industry has placed it far behind its
 major competitors in the world textile economy. The reasons for technological obsolescence are structural anomalies created due to lopsided fiscal policies,

high interest cost, excessive controls and regulations, etc. All these factors have created negative environment stifling investment in technology upgradation. Enhancement of efficiency and productivity of quality products of international standards, human resource development, capacity building of the non-wovens, technical textiles and the related machinery industry and ecology conservation are possible through effective and advanced IT solutions.

- 3. **BRIDGING THE SKILL GAP:** A large skill gap between the demand and availability of workers resulting in poor productivity is one of the prime challenges. To fill up the demand supply gap for exports and value addition, a focused and financially sustainable strategy for mobilizing and training workers is essential. Youngsters should be trained in textiles on the shop-floor to join the industry as trained workforce or set up their own units. Our manpower skills need to be massively upgraded, calling for serious reforms in the education system. Thorough changes in vocational training, curriculum redesign, faculty/mentor training, stronger trainer-employer linkage, apprenticeship development, etc. is still a challenge. Entrepreneurs in textile and apparel have to play a major role in this and we need top quality entrepreneurs to drive this sector like we had in the information technology (IT) industry.
- 4. MARKET DEVELOPMENT AND ACCESSIBILITY: Today the thrust area for Rajasthan's textile industry is to increase opportunities for market development and accessibility in value-added apparel and home furnishings that cater to market demand. Moreover, government policies since Independence have resulted in a fragmented industry in many sectors like fabrics. Woven apparels were reserved for the small-scale sector until 2001 and knitwear till 2005. This has led to higher cycle times in the garment sector, which is largely unorganised. A majority of stakeholders in the industry are in need of a comprehensive marketing mechanism that will directly fetch a premium price and enhance their economic condition. The challenge is to create a good marketing scenario with a clear differentiation of products in terms of core basics, innovation and fashion over competing countries. To eliminate inefficiencies in the system for sampling, delivery and great quality need is also a big challenge.
- 5. **GROWING COMPETITION IN DOMESTIC AND INTERNATIONAL MARKETS:** In the domestic market, industry must be prepared to meet growing competition from imported goods coming at lower import duties and goods produced locally by foreign controlled enterprises using their trademarks and latest technology. In the international market challenges come from other developing countries with enhanced international competitiveness and non-tariff barriers for environmental, health, safety, and technical standards. The textile industry of Rajasthan requires being competitive and cost effective by improving its productivity, product diversification, production technology and total quality control.
- 6. **BRAND PROMOTION:** Brands play an important role as they assure consumers that the products are of certain quality, durability, and conform to several social, environmental and durability standards. Promotion of "Made in India" brand for global acceptance is a challenging step for market penetration. Acquisition of brands by Indian companies is another strategy for promoting exports. Ecolabeling is emerging as one of the key requirements for global competitiveness through third party accreditation or certification.
- 7. **INFLEXIBLE AND RESTRICTIVE LABOUR AND INDUSTRIAL LAWS:** India's labour laws are a big drawback, especially in the garment sector where large seasonal orders require use of contract workers. The need of the hour is formulation of innovative strategy along with reforms in labour laws to address the emerging issues effectively in order to enable the country to secure a bigger share of the global textile market.
- 8. CHALLENGES IN EXPORTS: The export community faces tariff and non-tariffs barriers from the major export destination countries of EU and the US as they practise tariff escalations in the textile import from India to provide protection to their own industries. Exporters from India need optimum export infrastructure and reduction in customs and excise duty, weeding out unnecessary customs duty exemptions and rationalizing the tax structure to make our exports competitive². Decentralised and fragmented nature of the industry and unstability in the world textile trade encompass various constraints such as unstable prices, inability to avail institutional credit and diversification and inadequacies in transport, communication and banking infrastructure¹¹. The stake holders of Indian textiles industry also need to look for a mutually beneficial path to strengthen the value chain efficiency rather than resorting to inter segmental rivalry to achieve short term segment specific advantages. Among those objectives, he said, are to encourage exports of products that create more jobs; to encourage exports that earn more net foreign exchange and also encourage exports by compensating extra freight costs to distant markets

THE WAY TO APPROACH FORWARD

Despite challenges, the textile and apparel industry of Rajasthan is ready to enter its golden era with make in India campaign, determined to emerge as a manufacturing hub. Collaboration between industry and academia through skill development and vocational training programs and institutes are improving employability of the workforce. The government is rolling out initiatives which help the sectors can create a skilled workforce, which is in a position to compete globally, and support the future economic goals and initiatives like 'Make in India'. The Rajasthan Skills and Livelihoods Development Corporation (RSLDC), Technology Mission on Technical Textiles (TMTT), Apparel Export Promotion Council (AEPC), Apparel Training & Designing Centres (ATDCs), National Institute of Fashion Technology (NIFT), Fashion & Design Promotion Council (FDPC), Apparel International Mart (AIM)

Investments in the value-added products manufacturing, capacity to meet the standards of international market, infrastructure development for exports, substantial increase in the size of the raw material base are the other requisites for appropriate implementation of make in India in Rajasthan.

Government needs to reduce duty burden including excise duty, customs duty and anti-dumping duties on raw materials and textile products so that the increasing opportunities can be properly utilised. The Governments, both Central and State can play a major role in development of mega clusters for powerlooms, handlooms and handicrafts by implementation of welfare schemes for handloom weavers and handicrafts artisans and provide a number of incentives for export of textile products.

CONCLUSION

Since the textile industry of Rajasthan plays a significant role in creating employment, generating a substantial industrial output, and bringing revenue through export of garments and other textile products, inviting investors through a platform like "Make in India" can be beneficial. We have to work proactively to create a great symphony and. 'Make in India' is a right platform to unify, collaborate, reach our true potential and make Rajasthan a Preferred Destination of Textiles and Apparel production.

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