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OPPORTUNITIES AND CHALLENGES IN SUPPLY CHAIN MANAGEMENT IN SMEs: A CASE STUDY OF TEXTILE SECTOR IN INDIA

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ABSTRACT

The purpose of this paper is to review the literature on supply chain management (SCM) practices in small and medium scale enterprises (SMEs) and outlines the key insights to identify the opportunities and challenges to supply chain management in textile sector in India. The paper describes a literature-based research that has sought understand the issues of SCM for SMEs. The methodology is based on critical review of research papers from high-quality, international refereed journals. Mainly, issues are explored under three categories – supply chain integration, strategy and planning and implementation. This has supported the development of key constructs and propositions for textile sector in India. Survival of textile sector will be determined first and foremost by their ability to provide/produce more, at less cost, in less time, with few “defects”. The key to this is effective SCM. The issue is much explored in the context of large enterprises but less attention is paid to SMEs. Paper aims to surface out some facts for the same. The paper reports-classifies the literature and development of construct and propositions and the sector needs more investment in E-business.

KEYWORDS

supply chain management, textile, SMEs, India.

1. INTRODUCTION

A supply chain is the concatenation of firms – their facilities, functions, and activities –that are engaged in the production and delivering of a product or service. The process begins with supplying of raw materials and comprises all the available ways to reach the final customer. Facilities include storehouses, production centers, processing, delivering centers, final retail markets, and offices. Functions and activities include forecasting, connecting with suppliers including purchasing process, inventory, information sharing, assurance of quality, scheduling, production management, controlling of distribution and delivery, and monitoring customer service.

Supply chain management is used as strategic coordination tool of business processes within a firm and throughout its supply chain for the purpose of integrating supply and demand management including planning and coordinating activities that include sourcing and procurement of materials and services and controlling logistics.

In textile industry sector the firm is part of at least one supply chain, and many are part of complex supply chains. Supply chains are the lifeblood of textile companies, they connect suppliers, producers, and final customer in a network that is essential to the creation and delivery of finished textile products.

The objective of this study is to explore the supply chain management used by textile companies; nature, techniques, motivating factors. Another objective of the study is to investigate the opportunities available for the textile and challenges facing this core industrial sector in terms of competing with other markets such as china and USA. And study the weakening factors of supply chains in textile sector that reduce productivity, costs, and competitiveness and hence the effectiveness become threatened which causes a loss of world market share and decrease in profitability in a long term. To achieve the research objectives following research questions become necessary for the study to answer: 1. what is the nature of supply chains used by textile companies and what factors affect supply chain management? 2. What are the procedures and methods that can be used by textile companies to improve and enhance their supply chains?

Inductive approach will be followed to build a scientific framework for the dimensions of the problem and objectives of the research, based on historical data for a sample of textile companies, annual and monthly reports published by ministry of textile and textile committee, journals and articles related to the topic search.

2. LITERATURE REVIEW

2.1 DEFINITION OF SCM

Several authors have defined supply chain management (SCM) in a variety of ways. Hong and Jeong (2006) define SCM as a set of approaches utilized to effectively integrate suppliers, manufacturers, logistics, and customers for improving the long-term performance of individual companies and supply chain as a whole. SCM can also be defined as an actor-oriented approach focusing on how to organize and manage the flow of materials from “point of origin” to “end-user” as the point of departure (Vaaland and Heide, 2008). Arend and Wisner (2005) perceives SCM as a relation- oriented approach focusing on the relationships between the actors in the supply chain, and how co-operation and mutual interests can lead to improvements. Lastly, Lambert et al (1998) uses process-oriented approach to define SCM as “the integration of key business processes from end-user to original suppliers that provide products & services and information that add value to customers and other stakeholder.

Shah (2009) adopted a holistic approach while explaining the concept of supply chain management and explicated that supply chain involves the entire gamut of activities that are required to develop a finished product from the raw material and then delivering it to the end consumer. Supply chain management encompasses planning, design and control of transition of resources, information and capital through the supply chain partners to ensure value creation for all and meeting customer requirements in an effectual way. It is a common conviction that the partners involved in the supply chain are only manufacturers, suppliers and distributors. However, contracting to this, transporters, logistic partners, warehouses and customers also are an integral part of the supply chain. Contemporarily, more and more firms are acknowledging the fact that in the maturing markets, its supply chains that compete with each other rather than the firms themselves. Coyle et al (2008) analyzed supply chain from the logistics perspective and posit that firms need to develop networks between the actual vendors and the final customers. From the enterprise perspective, supply chain management can be seen as the gradual progression of the function of logistics wherein the firm attempts to see all the business functions in entirety and to achieve cost optimization and augmented process efficiency. The underpinning postulation is value creation for all and supply chain management is seen as a critical strategy for competitive analysis and gaining an edge over the counterparts. Thus, it involves integration of manufacturing, marketing and sales with logistics to develop a value chain.

Adding further, Basu & Wright (2010) see supply chain function wherein the entire network of organizations adopt a "product cradle-to-grave" concept where not only transfer of resources, manufacturing and delivery of products to the ultimate consumers and then disposal of the products post consumption focusing on efficiency enhancement.

Based on the explanation given, the supply chain management can be defined as "Supply chain management is a set of approaches utilized to efficiently integrate suppliers, manufacturers, warehouses and stores, so that merchandise is produced and distributed at the right quantities, to the right locations and at the right time, in order to minimize system-wide costs while satisfying service level requirements" (Basu & Wright, 2010, p. 5).

2.2 KEY SUPPLY CHAIN PROCESSES

Thomas, D. J., & Griffin, P. M. (1996) discussed the three fundamental stages of the supply chain, procurement, production and distribution; they concluded that increasing competitive pressures and market globalization are forcing firms to develop supply chains that can quickly respond to customer needs. To remain competitive, these firms must reduce operating costs while continuously improving customer service. With recent advances in communications and information technology, as well as a rapidly growing array of logistics options, firms have an opportunity to reduce operating costs by coordinating the planning of these stages. However, the underpinning intention of supply chain management is value creation. Groznik & Maslaric (2010) perceives supply chain management to be intended to facilitate escalated momentum of transition of supreme quality and useful information integral for the incessant flow of products to the customers. This warrants highly standardized business processes with a foundation of data base management, information technology aided tools along with competent workforce. All this is channelized to maximize value for all the stakeholders involved. From the value creation perspective, supply chain management requires integration of the chief business processes. Croxton, Lambert, M., & Rogers (2001) highlighted the eight chief processes that are the building blocks of supply chain management:

- Customer Relationship Management
- Customer Service Management
- Demand Management
- Order Fulfillment
- Manufacturing Flow Management
- Supplier Relationship Management
- Product Development and Commercialization
- Returns

The authors posit that these eight processes are expansive across the entire supply chain across the industry vertices and functional demarcations across functions like marketing, research and development, finance, production, procurement and logistics. The process of supply chain cannot be confined to one particular function but the activities of the above processes are majorly restricted to a particular function. Following is the diagrammatic representation of how business processes and functions are integrated across the supply chain.

2.3 NEED OF SCM IN SMES

Supply chain management (SCM) has increasingly become an important way to enhance competitive strength, and it is commonly argued that present day competition is between integrated supply chains rather than individual organizations. Studies of companies exploiting the benefits of SCM have indicated improvements in individual supply chain functions ranging from 10 to 80 percent (Wagner et al., 2003). Reduced software costs, industry-wide learning of best practices and increased probability of having to compete against rivals enjoying the advantages of SCM are driving forces behind adoption of the SCM concept (Arend and Wisner, 2005). Moreover, over the time the need for effective and efficient supply chain management has been felt amongst the small and medium sized enterprises as well. Adoption of SCM is gaining momentum rapidly across the globe. The advantages that it offers are the source of its need for SMEs: cost optimization, improved customer satisfaction, augmented adaptability, responsiveness, promptness and time management. All these are the core needs of SMEs of today. SCM also helps in integrated flow of information, goods and capital (Chen & Paulraj, 2004; Min et al., 2005).

Çalipinar (2007) explored the need of SCM amongst the SMEs of Turkey and found that the Turkish SMEs are experiencing bottlenecks due to the on-going harmonization process with the European Union. SCM are the only effective means to eradicate them and allow them to experience consistent growth. In the research, it was asserted that SMEs can develop their self-sufficiency only through adoption of SCM. This is because SCM shall trigger a synergy effect apart from the above mentioned advantages. Moreover, Thakkar & Kanda (2008) advocates that SCM helps in overcoming the issues that SMEs confront due to their structure and scale of operations. Through SCMs, SMEs can battle out the tiff for survival in the market through a trimmer conversion process, low stock management overheads, diminished labor costs and prompt distribution. These will eventually allow the SME to have standardization of production; well-defined supply chains; better use of technology; prompt procurement and distribution process; reduced overheads; competence to take on global competition. Aarabi & Shariatmadari (2012) highlights the need of SCM for SMEs from the perspective of internationalization and globalization. SMEs need SCM to improvise their ability to leverage their ascendable competencies in an integrated mutual network of partners through prompt, swift and easy access to the complementary proficiencies of the channel partners and cater to the customer requirements across borders. Park, Nayyar, & Low (2013) opined that the central challenge confronted by any SMEs is to have maximum output with minimal input. SCM brings with it, operational excellence, better learning and chances to explore newfound markets. Operational excellence is accomplished through process improvement that trims lead times, eliminates operational blunders, and lowers inventory requirements, improved quality and customer service, more innovation and risk management. For better learning through SCM, SMEs get the opportunity to develop mutual agendas with several channel partners and retrieval of databases of innovative information, knowledge and training. From market expansion point of view, SCM helps SME to play further and gain entry into the newer geographical markets, newer customer segments through more value-addition. Thus, SCM can assist the weak SMEs in harnessing potent outcomes through continuous learning and improved operational efficiencies and gradually pave their way into new business avenues (Park et al., 2013).

3. OVERVIEW OF TEXTILE SECTOR IN INDIA

3.1 GENERAL OVERVIEW

The Indian textile industry has an overwhelming presence and one of the oldest sectors in the economic life of the country and among the most important in the economy in terms of the production volume, investment and employment power. The sector employs nearly 35 million people. It is also one of the largest contributing sectors of India's exports worldwide. The report of Working Group constituted by the Planning Commission on boosting India's manufacturing exports during 12th Five Year Plan (2012-17), envisages India's exports of Textiles and Clothing at USD 64.11 billion by the end of March 2017. The textiles industry accounts for 14% of industrial production, which is 4% of GDP; employs 45 million people and accounts for nearly 11% share of the country's total exports. National household survey: market of textile and clothes 2010 estimated that 16.6% of households in the country depend on this sector.

Indian textile industry is controlled by ministry of textile responsible for policy formulation, planning, development of export promotion and trade regulation in respect of the textile sector. This includes all natural and manmade cellulosic fibers that go into the making of textiles, clothing and handicrafts. The ministry of textile controls the sector through attached and subordinate offices and other organizations/bodies under the ministry.

3.2 TEXTILE TYPES

According to textile committee: textiles means any fabric or cloth or yarn or garment or any other article made wholly or in part of cotton; or wool; or silk; or artificial silk or other fiber, and includes fiber. According to ministry of textile as declared in annual report 2013, India is the second world cotton production after china with volume of 24 million bale and 21.1 % of world market share as shown in appendix 2. 2387 million metric of silk, with total export of 307.8 US \$ million as shown in appendix 3., 3057 million kg of different types of yarn with growth rate of 10 % compared to 2012, as shown in appendix 4., 1591.3 million tons of all kinds of jute with exported value 1598.05 Rs corers.

3.3 POWER LOOM

There are approximately 5.24 Lakh Powerloom Units with 23.24 Lakh Powerlooms as on 30.09.2012. The technology level of this sector varies from obsolete plain loom to high tech shuttleless looms. There are approximately 1,05,000 shuttleless looms in this sector. It is estimated that more than 75% of the shuttle looms are

obsolete and outdated with a vintage of more than 15 years and have virtually no process or quality control devices / attachments. Government funds to the tune of Rs.30 crore was released for implementation of the Powerloom Mega Clusters till December, 2012. Details of Mega Clusters are given in table 1:

TABLE 1

Handloom Sector (6 Mega Clusters)	Handicraft Sector (5 Mega Clusters)	Powerloom Sector (4 Mega Clusters)
1. Varanasi (U.P). 2. Sivsagar (Assam). 3. Murshidabad (W.B.). 4. Virudhunagar (T.N)). 5. Guntur &PrakashamDistt. (A.P).* 6. Godda& Neighboring* Distt. (Jharkhand)*	7. Moradabad (U.P.) 8. Narasapur (A.P.). 9. Bhdohi-Mirzapur (U.P.). 10. Srinagar (J&K). 11. Jodhpur (Rajasthan)	12. Bhiwandi (Maharashtra). 13. Erode (Tamil Nadu). 14. Bhilwara (Rajasthan). 15. Ichalkaranji (Maharashtra)*

*Announced in Budget 2012-13.

Source: Ministry of textile, outcome budget 2013-2014

3.3.1 EXPORTS

Exports of textiles products from India have increased steadily over the last few years, particularly after 2004 when textiles exports quota were discontinued. India's Textiles & Clothing (T&C) export registered robust growth of 25% in 2005-06, recording a growth of US\$ 3.5 billion over 2004-05 in value terms thereby reaching a level of US\$ 17.52 billion and the growth continued in 2006-07 with T&C exports of US\$19.15 billion recording an increase of 9.28% over previous year and reached USD22.15 billion in 2007-08 denoting an increase of 15.7% but declined by over 5% in 2008-09. Exports of Textiles & Clothing grew from USD 21.22 billion in 2008-09 to USD 22.41 billion in

2009-10 and has touched USD 27.47 billion in 2010-11. In the financial year 2011-12, exports of textiles and clothing, has grown by 20.05% over the financial year 2010-11 to touch USD 33.31 billion. As per the latest available export data, the salient features of the overall textile exports for the period 2012-13 were valued at Rs.11985.65 crore as against Rs. 112145.10 crore during the corresponding period of financial year 2011-12, registering an increase of 6.88 percent in rupee terms.

In US dollar terms, the same was valued at US\$21996.04 million as against US\$23819.72 million during the corresponding period of previous financial year registering a decrease of 7.66 percent in US\$ terms. It is well-established that India possesses a natural advantage in terms of raw material availability. India is the largest producer of jute, the second-largest producer of silk, the third-largest producer of cotton and cellulosic fiber/yarn and fifth-largest producer of synthetic fibers/yarn.

4. OPPORTUNITIES IN TEXTILE SECTOR

4.1 GOVERNMENT SUPPORT

The developmental activities of the Ministry of textile are oriented towards making adequate quantities of raw material available to all sectors of the textile industry and augmenting the production of fabrics at reasonable prices both from the organized and decentralized sectors of the industry. Towards this objective, the Ministry lays down guidelines for planned and harmonious growth of various sectors of the industry. Special emphasis is given to the development of handlooms in view of its large employment potential. The Ministry monitors the techno-economic status of the industry and provides the requisite policy framework for its modernization and rehabilitation. The Ministry coordinates the activities of Textiles Research Associations and lends financial support to them for undertaking research and development.

4.2 RAW MATERIALS

India possesses a natural advantage in terms of raw material availability. according to annual report of ministry of textile 2013 India is the largest producer of jute(133 lakh bales), the second-largest producer of silk(23679 metric tons), the third-largest producer of cotton and cellulosic fiber/yarn(23.5 million balls) and fifth-largest producer of synthetic fibers/yarn/wool (56145 ton). The government has implemented many initiatives to support and develop quality and quantity of all types of raw materials.

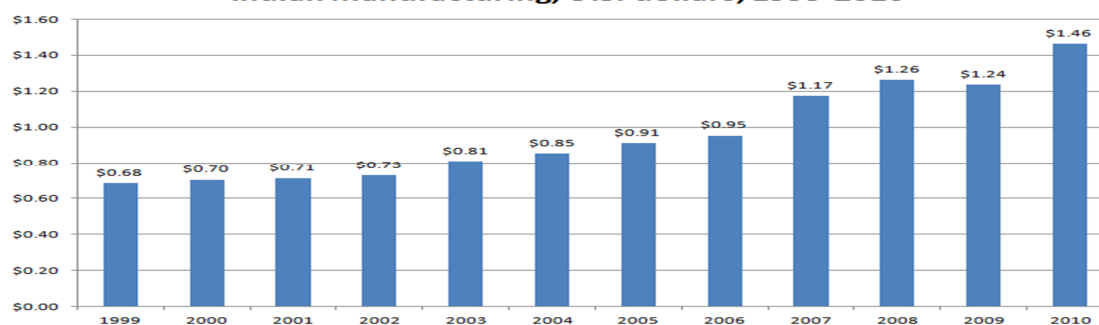
Comparing with other countries such as china there is a huge gap in exports 2012-2013, for example china produced 30.1 million bales of cotton and exported 3443.86 million \$, India produced 23.3 million bales and exported 707.32 million \$, the same case when make comparisons with USA and turkey.

4.3 LABOR COST

According to bureau of labor statistics/USA, Hourly compensation costs in India have grown steadily in both rupees and in U.S. dollars, but the rate of increase for production workers has been slower than the rate for all manufacturing employees, as shown in figure 2 below.

FIGURE 1

Average hourly compensation costs for all employees in Indian manufacturing, U.S. dollars, 1999-2010



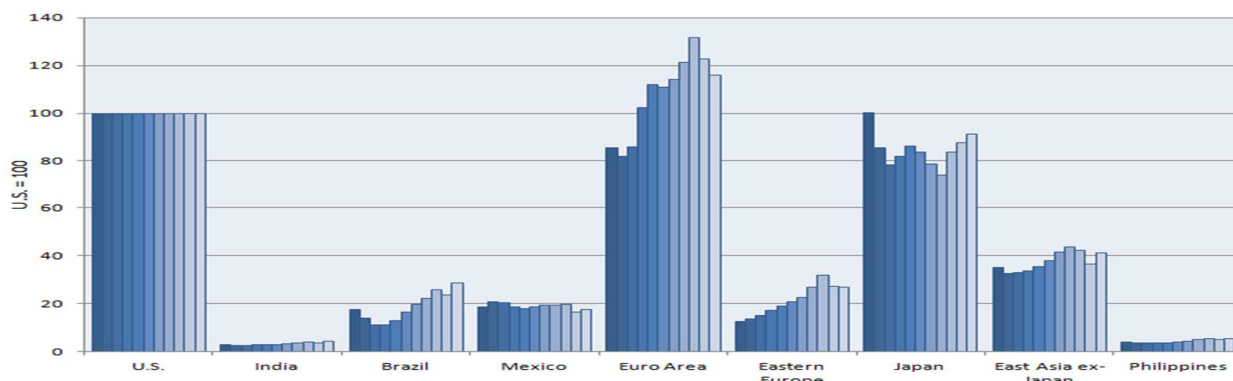
Note: Data refer to India's organized manufacturing sector only.
Source: U.S. Bureau of Labor Statistics, International Labor Comparisons

Source: bureau of labor statistics/USA

The hourly compensate costs is very low comparing with other industrial countries as shown in figure 2 below, taking in consideration that 15.3% of Indian workforce is in textile sector after food/beverage/ tobacco with 20.9%.Which makes competitive advantage in reducing total costs.

FIGURE 2

Average hourly compensation costs for all employees in manufacturing, selected economies and regions, 2000-2010



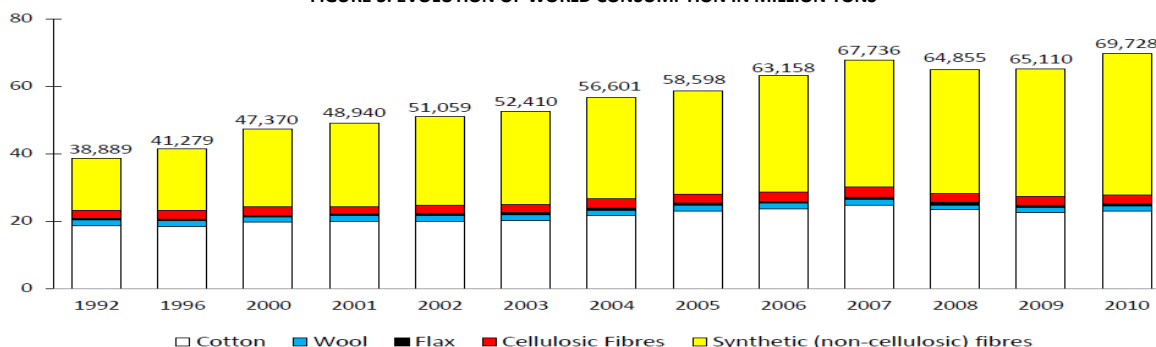
Note: Data for India refer to the organized manufacturing sector only.
For a description of the economic groups, see the technical notes at www.bls.gov/ilc/ichcctn.pdf, Table 2.
Source: U.S. Bureau of Labor Statistics, International Labor Comparisons

Source: bureau of labor statistics/USA

4.4 INCREASE OF DEMAND

According to WORLD APPAREL FIBER CONSUMPTION SURVEY July 2013, for 112 countries and 14 regions and sub-regions covered indicate the quantity of cotton, wool, flax, cellulosic, and synthetic fibers available for consumption within each country conducted by FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS AND INTERNATIONAL COTTON (FAO), "World fiber consumption has been steadily trending up over several decades. Per capita consumption was about 3.7 kilogram in 1950 and climbed to 10.4 kilogram in 2008. Given the nature of the final products of fibers, clothing and textiles, the per capita consumption of man-made fibers in developing countries increased from 2.8 kilograms in 2000 to 4.9 kilograms in 2008. In 2008, total cotton consumption in developed countries accounted for about 50% of world consumption with a per capita consumption of 9.5 kilograms, which was nearly 4 times the 2.4 kilograms consumed in developing countries. By 2009, the market share of developed countries declined to 39.0%: total demand destruction between 2007 and 2009 amounted to 4 million tons in developed countries, while developing countries experienced demand destruction of 515,000 tons in 2008 but demand increased by 1.9 million tons in 2009. In 2010, total apparel demand in developed countries partially recovered by 2.3 million tons to 27.7 million tons, while developing countries continued experiencing demand growth for 2.3 million tons to 42.0 million tons. As a result, the market share of developed countries partially recovered to 39.8% as shown figure 4.

FIGURE 3: EVOLUTION OF WORLD CONSUMPTION IN MILLION TONS



Source: FAO report 2013

5. CHALLENGES IN TEXTILE SECTOR

5.1 COMPETITION

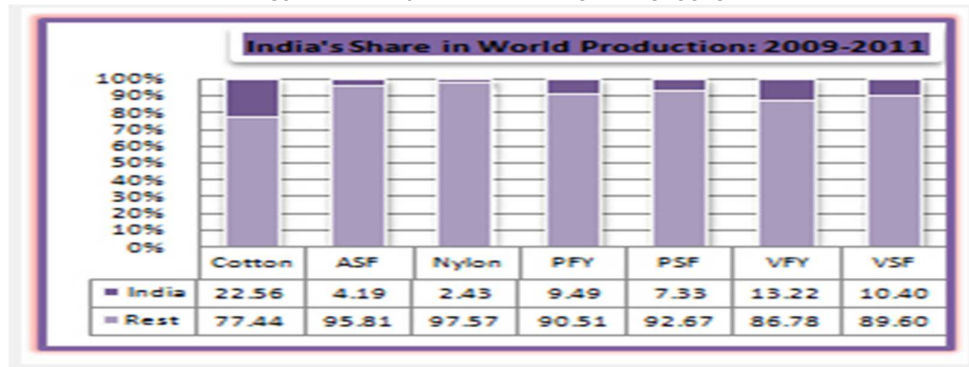
The fierce competition of main producer and exporters such as china, USA, turkey, Pakistan and other Asian countries in price and customer services are the most challenge for textile sector in India. Table 2 below shows the top ten textile exporters and figure 4 below shows Indian market share.

TABLE 2: TEXTILE EXPORTS- TOP TEN COUNTRIES (April, 2011 - Dec., 2011 and April, 2012 - Dec., 2012)

US \$ Million

Sl No	Country	April, 2011 - Dec., 2011	% Share (Total Textiles Exports)	April, 2011 - Dec., 2012	% Share (Total Textiles Exports)	% Growth (April, 12 - Dec, 12 over April, 11- Dec, 11)
1	U S A	4083.35	17.21	4054.30	18.43	-0.71
2	CHINA P RP	2460.83	10.37	2103.88	9.56	-14.51
3	U ARAB EMTS	1603.25	6.76	1563.76	7.11	-2.46
4	U K	1478.42	6.23	1451.48	6.60	-1.82
5	BANGLADESH PR	758.74	3.20	1136.97	5.17	49.85
6	GERMANY	1391.99	5.87	1063.72	4.83	-23.58
7	FRANCE	734.13	3.09	546.99	2.49	-25.49
8	SPAIN	564.79	2.38	504.34	2.29	-10.70
9	ITALY	705.09	2.97	492.08	2.24	-30.21
10	NETHERLAND	522.00	2.20	411.89	1.87	-21.09

FIGURE 4: INDIAN SHARE IN TEXTILE WORLD PRODUCTION



Source: YNFX ONLINE <http://www.yarnsandfibers.com/country-reports/india-fibre-report>.

The Indian market share in world exports doesn't comply with its mass production of raw materials and its human and agricultural resources, not in textile sector only, but in all its exports share from all sectors.

5.2 UNSKILLED WORKERS

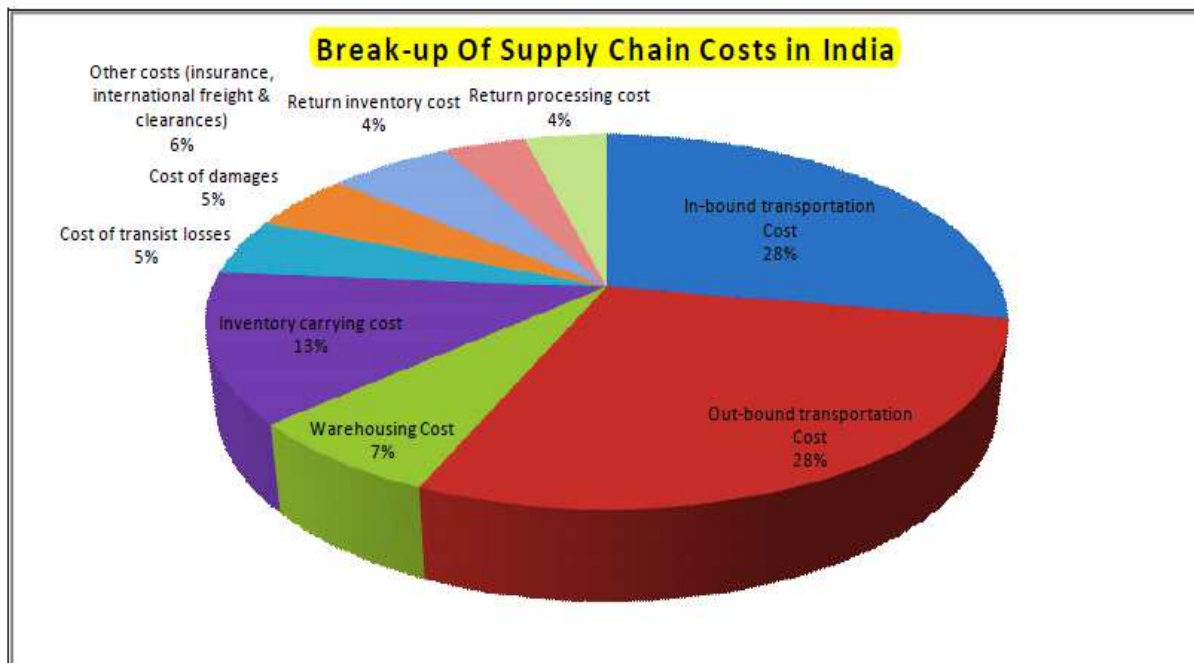
According to Study on mapping of human resource skill gaps in India till 2022 conducted by NSDC (national skill development corporation, New Delhi, 2012) there are many skill gaps at all levels in textile sector we brief it as follow:

- Managers: Lack of adequate knowledge to source from international destinations, Awareness of the latest price trends and sourcing destinations is limited to the domestic market, lack of In-depth knowledge of the various types of cotton and quality parameters.
- Purchase associate/executive: Insufficient knowledge of various types of product defects and other quality parameters.
- Maintenance Manager: Awareness of maintenance requirements of various machines is limited, inadequate knowledge of current machinery.
- Maintenance operators: Fitters (Maintenance operator) from ITIs have limited knowledge of maintenance of spinning machinery, The ITIs do not provide training specific to the textile machines which leads to the skill gap.
- Production Manager: Inadequate cross-functional knowledge especially of maintenance, inadequate practical knowledge of tools, Insufficient soft skills to manage shop floor people, Awareness of modern production methods and machines is limited.
- Supervisor: Lack of man-management skills to manage shop floor Personnel, The supervisors typically have work experience in particular processes of the spinning mill as operator and do not have a formal training/education of other processes, Awareness of modern spinning machines is limited.
- Operator: Knowledge/ Skill confined to single or few machines, Lack of knowledge of compliance to quality, inadequate ability to multitask between different types of machines.
- Quality Control Supervisor/Manager: Inadequate ability to translate buyer requirements to quality parameters, Lack of knowledge of cause-effect relationships for various defects (such as breakage of threads).
- Sales Manager: Negotiation and communication skills. Also, South-based spinning mills require people with knowledge of Hindi which are difficult to find.
- Junior Merchandiser: Inadequate understanding of various production activities.
- Designer: Inadequate understanding of buyer requirements which leads to number of iterations before the sample is accepted, insufficient knowledge of latest fashion trends in the international markets.

5.3 TRANSPORTATION COST

transportation cost is about half of the total of supply chain cost, this comes from the large distribution of textile sector, bad planning of some companies, very far from shipping ports, lack of coordination, and lack of outsourcing. Figure 5 shows cost distribution.

FIGURE 5: SUPPLY CHAIN COST IN INDIA.



Source: IBM Institute for Business Value 2003 and 2006 Value Chain Studies

5.4 PROMOTION

The government thinks India has the potential to increase its textile and apparel share in the world trade from the current level of 4.5 per cent to 8 per cent and reach \$80 billion by 2020. India has the highest number of looms – 1.8 million shuttle looms (at 45 per cent of global capacity) and 2,00,000 shuttle-less looms (at 3 per cent of global capacity).

Indian products still now is not well known especially in Middle East and Africa markets, to achieve 8 percent market share plan in 2020, this ambitious target needs intensive promotion plan for Indian textile, with a strong coordination between government and private sector.

6. FINDINGS

Paper summarizes the reported literature and classifies it based on their nature of work and contributions. It was seen that there is a lack in qualified skills in textile sector, at all levels. Strong need is felt that supply chains need more cooperation and coordination between manufacturers and the government, and between ministry of textile and other textile institutes and committees to organize, control, and develop the textile sector which can help manufactures to take more advantage from Government.

Main challenge for supply chain in textile sector is the transportation cost; it is quite high and consumes half of the total cost of supply chain. It was also concluded that the textile sector exports are focused on limited markets and can easily open to new markets, and finally the sector needs more investment in E-business.

7. MANAGERIAL IMPLICATIONS

Coordination between companies and ministry of textiles should be enhanced so the textile companies can take advantage of ministry initiative, and in other side the government can solve the companies' real problems.

The textile sector should expand its market share by entering new markets. The companies should minimize high cost of transportation, and coordinate with the government to find solutions for it.

Textile sector should focus on quality rather than competing in price with China and other Asian countries.

The textile sector should invest in enhancing e-business capabilities.

Finally, companies should comply to supply chain management metrics to improve its supply chains and reduce defects, reduce cost, and ensure high level of quality assurance.

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