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TEXPROCIL & NEWSLETTER



A bi-monthly edition of THE COTTON TEXTILES EXPORT PROMOTION COUNCIL OF INDIA



Volume I. Issue No. 3 | May - June, 2021

**SPECIAL
EDITION**

**Potential, Demand and
Prospects for Growth of**

**KNITTED
FABRICS**

MARKET IN INDIA



Contents



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Editorial

Dear Reader,



Dr. Siddhartha Rajagopal
Executive Director

As we review the landscape of fabric manufacturing from India, the trends clearly indicate a growing demand for Knitted Fabrics. Available data shows that exports of Knitted fabrics from India have grown at a CAGR of 15% during the period 2015-2016 to 2019-20. Similarly imports into India during this period has grown by 12%. Production during this period has also shown a healthy growth.

This third issue of the bi-monthly edition of TEXPROCIL Enewsletter,

focuses on the growth prospects for the Knitted Fabrics sector. Well supported by next-gen knitting technologies, changing consumer preferences and pandemic induced work life, knit fabrics are facing a buoyant revival. This edition includes informed articles written by international experts, practising managers from the industry and entrepreneurs themselves representing leading companies.

In the article titled "Good days ahead in the markets for knitted fabric and large circular knitting machines", Dr. Olivier Zieschank, Director, International Textile Manufacturers' Federation (ITMF) is hopeful of a positive outlook in the business situation of knitted fabrics and large circular knitting machines. To support the assertion, he has included key findings of the 8th ITMF Corona-Survey and the data on machine shipments during 2011 to 2020. Streaming through the data, Dr. Oliver feels that while the past is hard to understand, the future is even more difficult to predict! However, he is optimistic that there is a chance for consumption of knitted fabric to continue growing in 2021.

The article titled 'Future of Knit Textiles' by Shri Pranav Dave, Chief Marketing Officer, Arvind Ltd. discusses two knitwear segments, in particular, that have become an essential part of today's wardrobe viz. 'Comfort dressing' with embedded performance for all work-from-home (WFH) categories and 'Active sportswear' for health wellness benefits. Casualwear categories like athleisure and lounge wear are witnessing significant acceleration in India, similar to trends in the global markets. Summarizing the key success factors supporting the growth of knitted fabrics market, Shri Dave discusses some recent developments which offer a route for the industry to reinvent the way it creates and trades in the near future.

'Indian Knitting Industry with Competitiveness, Growth, Sustainability and Technology' – the article by Shri Devadas Dhamodaraswamy, Chief Technology and Business Development Officer, Loyal Textile Mills Ltd. provides information on the trends for Knitted Fabrics in global as well as domestic market. In this article, Shri Dhamodaraswamy also visits some of the other

exporting countries to understand their focus. Suggesting course corrections, the author calls for developing a focus on broad basing the production capacity, cost efficient production and diversifying into new segments. He emphasises on making 'Made in India' a global brand and appeals to all the industry colleagues to build a New India for a New World.

Presenting an 'Overview of Knitted Fabrics Market', Shri Umesh Toshniwal, Vice President – Marketing, Nitin Spinners Ltd., analyses the various qualities of knitted fabric and their suitability for end-use applications. Making recommendations for the knitted fabrics market, with a view to take advantage of available opportunities, Shri Toshniwal suggests that the knitted fabric manufacturing companies should focus on manufacturing weft-knitted fabrics, outsource business to low markets, expand through partnerships and collaborations, and manufacture eco-friendly fabrics, among other initiatives.

In his article titled 'Knitting the Success Story' – Shri Mohit Maheshwari, Vice President, Maral Overseas provides a metaphor to the "knitting" technique by linking it with end-use features such as fabric structures, fashion application, fitness & activity, stretch fitting and above all comfortable to use. These factors, Shri Maheshwari suggests, have led to the demand for knit fabrics increasing at a pace faster than any other type of fabrics. From the present level of approx. USD 28 billion, the global knitted fabric market size is expected to witness continuous growth in the coming years on account of various factors driving the market like - shift from formal wear to casual wear, shortening life cycle of garment and widening applications in the automobile, construction, manufacturing, and medical sectors.

Shri Ashish Saraf, Director, Technocraft Industries (India) Ltd. has penned an article titled 'Knit Fabric – An opportunity for India'. The article brings out the success story of the company in the knitted fabrics market from a manufacturing and exporting perspective. Shri Saraf describes his company's journey in foraying into knits, how the company attained a level of success and the key growth enablers. Sharing the lessons learnt in the knit fabric business, Shri Saraf also offers his views on what lies ahead for the knit fabric sector in the light of emerging concerns on sustainability issues and demand / supply situation.

Friends, in publishing the digital edition of the bi-monthly Newsletter, now in its third edition, we at TEXPROCIL, have continued to focus on matters of interest pertaining to the textile industry and trade at large. The bi-monthly Newsletter seeks to reach out to a diverse range of readers cutting across a wide range of spectrum spanning Government officials, Indian Missions abroad, independent analysts and members of trade and industry.

Friends, the authors of all the articles featured in this edition are actively involved in the textile value chain and have shared their viewpoint and experiences in the knitted fabrics domain. All of them have expressed in unison that in the 'New World' as most of the producers are seeking ways to curtail economic, social and environmental costs of their manufacturing processes, the consistently growing demand for knitted fabrics will continue to offer viable solutions to fuel their aspirations.

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Chairman's Page

Dear Friends,



Shri Manoj Patodia
Chairman

In the present day it takes a huge effort to offer new products while also dealing with the volatility in the textile market. Given this context, the one segment that has been steadily growing within the textile value chain is knit fabrics and knitwear.

Knitted fabrics that are generally used in clothing that require changes in shape play a major role in the apparel sector. Advancements in knitting technology have resulted in rapid transformation of the

industry and with improved technology and product features, the global market for knitwear is evolving constantly thereby giving a huge boost to the need for various types of knitted fabrics.

Market Summary

In 2020, the total knit fabric imports in the world were US\$ 23 billion and the leading importers of knitted fabrics were Vietnam, Indonesia, Bangladesh, Hong Kong and China while the leading exporters of knitted fabrics were China, Korea, Taiwan, Turkey and Hong Kong. Vietnam was the largest importer with US\$ 6.1 billion while China led the knitted fabric exports with US\$ 16.2 billion.

India's exports to the world in knitted fabrics have been stagnating at around US\$ 440 million in recent years. On the other hand, India imports around US\$ 565 million of knitted fabrics for consumption by the apparel industry.

Among the top 10 knit fabric products imported in the world there are two cotton based items while the rest are of manmade fibre. The major items in India's export basket of knitted fabrics are grey and dyed cotton knitted fabrics.

The Global Knitted Fabric Market is projected to grow at a CAGR of 4.8% from USD 23.16 billion in 2019 to USD 33.63 billion in 2027. Almost 60% of the total knitted fabric market is occupied by Weft-Knit product type sub-segment. Weft knit fabric segment is expected to grow at a CAGR of 4.2% from 2019 to 2027 while warp knit fabric segment are expected to grow at a faster rate of 5.7% during the same period.

Key Features

The global market landscape of knitted fabric remains a competitive but fragmented one with a number of small and large players. The growing demand for technology development and increased diversification promises enormous potential for innovative players.

Characteristics like better breathability has caused the demand for feather-light circular knit fabrics to increase in the hosiery market. Lightweight knitted textiles have also gained traction for protective clothing with sponge-like, anti-tear and durable fabrics added to the protective garments in single or double layers. Similarly, in the sportswear industry, featherweight textiles, together with high compression, chlorine-resistant, and moisture-management properties have seen high demand.

Although market development can be attributed to growth in the apparel industry, it is the growing importance of knitted fabric in end use application sectors like automotive, construction, manufacturing and medical that is also expected to fuel market demand.

Favorable factors for knitting industry

Some of the favourable factors that make knitting a viable and commercial operation are:

- The capital investment required for starting a new knitting unit is lesser compared to other fabric making units.
- Time taken for completion of knitted garments is lesser
- Knitting is more flexible than weaving in a way that styles and designs can be modified rapidly and so keeping pace with the quick changes in fashion becomes possible.
- Knitted apparels make a perfect choice for today's generation who are more focused on wrinkle free, comfort wear and easy caring fabrics.

Perspectives in the knitting industry

There are different perspectives that can categorise the knit fabric and knitwear segment, some of which are outlined below:

Product Type Outlook

Warp-knit products are anticipated to experience a rapid growth as warp knitting is used in a variety of industries including clothing, interior wear, home, automobile etc. The rapid growth of the automotive, building and manufacturing industries is expected to fuel the growth of the segment.

Weft-knit fabric dominates the sector as low cost, improved elasticity, and simplified manufacturing process make it preferable among manufacturers. It includes various stitch types, including plain or jersey, rib, purl, interlock, double knit, and circular knitting. Underwear, pajamas, jumpers, scarves, caps, and gloves are widely used for weft knitting. In the seamless hosiery and underwear manufacturing industries, circular knitting machines have gained significant importance over the past few years.

Material Type Outlook

Dyed synthetic fibers are the largest segment in the global knitted fabrics market mainly due to the use of such type of knitted fabrics in apparel on a wide scale. The changing customer preference for lightweight and high-performance knitwear fuel the demand for raw materials, including silk, polypropylene, linen, fur, faux and synthetic fibers. The apparel industry has seen steady growth in demand for loop stitch jackets, cardigans, large shawls, and scarfs over the past couple of years.

Chairman's Page

Continued
from Page 4

Application Outlook

Fashion & clothing is the largest segment of the knitted fabrics market and also the fastest-growing segment. The size of the market is mainly due to the high demand for knitted footwear, global adoption of sportswear and casual wear and high popularity of knitwear among the millennial population.

One of the product's essential application resides in the automotive industry, owing to its cushioning

feature the spacer fabric is broadly used in the manufacture of car seats, airbags, the protective lining over wires, and roof. These textiles are used in mats, filters, tires, seat belts, and engines that are soundproof. Rapid growth in the automotive industry is expected in the near future to fuel demand for knitted fabrics.

The Technical Application segment holds the largest share with major applications in the technology sector being packaging, automotive, manufacturing, and household, construction, and medical. For its knots-free properties, the raschel and crochet knitting technology ensure secure and scratch-free handling of sensitive components.

Knitted fabric has taken on considerable importance in the medical textile industry with a wide application in the production of bandages, plasters, hospital laundry bags, wheelchair coverings and seating, medical mattresses, and orthopaedic support. Such fabrics are also commonly used as implantable medical textiles for artificial ligaments, lungs, ribs, sutures, hernia pads, artificial elbows, and hip joints. The medical industry's rapid development is expected to fuel demand for the product.

Regional Outlook

Factors such as environmental sustainability, regulatory enforcement, and early implementation of innovative manufacturing strategies in North America play a crucial role in influencing development in the industry. Due to competition, North America has hit a sluggish plateau in the knitted fabric market but is anticipated to grow due to the increasing demand for environmentally friendly fabrics.

The European market is anticipated to see a more stable growth in the coming years at a CAGR of 1.3% with China representing almost one-third of Europe's textiles and clothing imports.

Asia-Pacific dominates the market share of total revenues for knitted fabrics with China holding the largest share in the

world in every country. Other than China, knitwear markets are also prominent in India and Bangladesh. Favorable regulatory structures, policy initiatives, and low labor costs have accelerated industry growth in this area.

The India Equation

India's textile and clothing is majorly cotton based and hence volatility in cotton prices affects the downstream industry including the knitted fabrics market. Cotton is an essential raw material for the manufacturing of knitted fabrics and hence the fluctuations in cotton prices raises the raw material costs for the manufacturers of knitted fabrics, affecting overall profit margins.

Demand for eco-friendly fabrics is rising due to increasing awareness of global warming and the need for environmental protection. Eco-friendly fabrics are made from environmentally sound materials like organic cotton, organic linen, Tencel and recycled materials and hence the Indian T&C industry needs to adopt to this new change which will gain significance by 2025.

Indian manufacturers of knitted fabrics will also need to look increasingly at using artificial intelligence in processes of manufacturing of fabrics. Before the fabric is produced, artificial intelligence is used to foretell the quality and properties of the fabric using yarn, fiber, and fabric construction data.

Market-based strategies for the knitted fabrics market in India should include investment in artificial intelligence technology, the adoption of 3D knitting machines, and investment in IoT technology to improve production efficiencies and cut costs.

Asia-Pacific is the largest knitted fabric sector region in the market as witnessed by the movement of the sale of knitting machines with India among the leading buyers.

Conclusion

Reports and data forecast promising developments for increased adoption of advanced technologies in producing knitted fabric. The cumulative impact of the pandemic was felt across the production cycle of different products while also disrupting global supply chains. Trade barriers further restrict the prospect of demand-supply and due to the partial or complete lockdown in various regions along with partial closure of the industry, the overall development cycle has been adversely affected, hampering the global demand for Knitted Fabric.

New companies entering the industry would focus on innovating and providing through advanced technologies, thereby reducing complications and lowering the overall total cost of operation. Experts also believe that increase in the adoption of the latest technology by investing in R&D in emerging nations would be a key development area for the industry.

I am glad to introduce the promising sector of knitted fabrics in this bi-monthly edition and sure that articles on this subject contributed by some of the leading manufacturers of knit fabrics in India will be an interesting read for our subscribers..

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TRADE FACILITATION

Chairman, TEXPROCIL Welcomes extension of the ROSCTL scheme for Made ups

The Union Cabinet chaired by the Hon'ble Prime Minister, Shri Narendra Modi, has given its approval for the continuation of the ROSCTL (Rebate of State and Central Taxes and Levies) with the same rates as notified by the Ministry of Textiles vide Notification dated March 8, 2019 for Made ups and Garments till March 31, 2024.

The RoSCTL scheme was discontinued w.e.f. January 1, 2021 after the implementation of the RODTEP rates.

Welcoming this decision, Shri Manoj Patodia, Chairman of The Cotton Textiles Export Promotion Council (TEXPROCIL) said "The extension of the RoSCTL scheme is a huge positive development which will improve the competitiveness of Made ups articles in the export markets and lead to a quantum jump in overall exports and increase employment especially women".

It is a globally accepted principle that taxes and duties should not be exported to enable a level playing field in the international market for the exporters. This implies that all taxes and levies borne on the products which are exported should be either exempted or refunded to the exporters.

In the textile sector, overseas buyers place orders and exporters have to chalk out their activities well in advance

and, therefore, it is important that the policy regime regarding export of textile products should be stable. Exporters can now take a long-term perspective while negotiating export orders, according to Shri Patodia.

Exporters are passing through challenging times on account of difficult export market conditions caused by the pandemic and the RoSCTL scheme can help them to overcome the situation substantially, according to Shri Patodia.

Dr. Siddhartha Rajagopal, Executive Director, TEXPROCIL also added "the extension of the RoSCTL scheme will not only lead to an increase in exports of Cotton textiles manifold but will result in attracting investments in the sector".

Shri Manoj Patodia thanked the Hon'ble Prime Minister, Shri Narendra Modiji, Hon'ble Union Finance Minister, Smt Nirmala Sitharaman and the Hon'ble Union Minister of Commerce & Industry, Consumer Affairs & Food & Public Distribution and Textiles, Shri Piyush Goyal and Smt Darshana Vikram Jardosh, Minister of State for Textiles for extending the RoSCTL scheme.

For more information, please visit: www.texprocil.org.

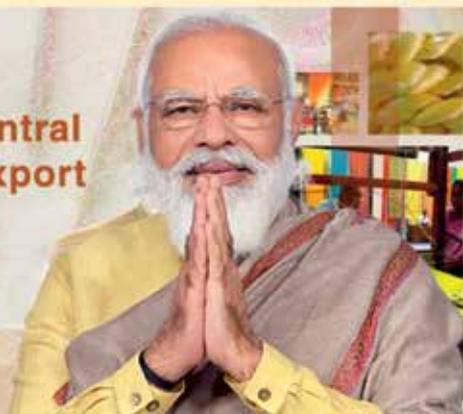
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**Members of
TEXPROCIL
and the entire
fraternity
of Home Furnishing
and Made-ups
manufacturers and
exporters located in
different clusters
across India**

With the continued support under the RoSCTL Scheme, the rapidly growing Home Textiles and Made-ups industry will emerge as a strong pillar in the Indian economy, giving a fillip to Aatmanirbhar Bharat and leading to generation of substantial job opportunities especially for women

**Govt. approves extension of
Rebate of State and Central
Taxes and Levies on Export
of Apparel/Garments &
Made-ups (RoSCTL)**



RoSCTL Extended till 31st March 2024 at Existing Rates

-  **Benefit to labour-intensive textile sector**
-  **Provide a level playing field to Indian exporters**
-  **Fillip for export of globally competitive Indian Textiles**
-  **Stable & predictable policy regime**






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**Notification No. K-11020/9/2021- E&MDA
Reg. Continuation of Market Access Initiative Scheme**

No.K-11020/9/2021-E&MDA
Government of India
Ministry of Commerce & Industry
Department of Commerce

Udyog Bhawan, New Delhi
Dated: 19th July, 2021

Subject: Continuation of the Market Access Initiative Scheme - reg.

Sir / Madam,

I am directed to state that the competent authority has approved continuation of the Market Access Initiative (MAI) Scheme in a revised form, for a period of five years beyond 31st March, 2021. A copy of the Market Access Initiative Scheme, 2021 is enclosed for information and to give wide publicity to the scheme among your members. Further, it is also requested to undertake necessary initiatives and projects in accordance with the Scheme guidelines aimed at developing and strengthening export market for Indian goods and services.

Yours Faithfully,

M. JAYACHANDRAN
Deputy Secretary to
Government of India

Note: Details on various Export Promotion Schemes can be requested on email : info@texprocil.org



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**SPECIAL
FEATURE**

The 8th ITMF Corona-Survey
by Dr Christian Schindler, Director General, ITMF



Dr. Christian Schindler, Director General, International Textile Manufacturers Federation (ITMF) reports on the business situation in the textile industry as presented by the 8th ITMF Corona-Survey.



**International Textile
Manufacturers Federation**

(I) The business situation in the textile industry is relatively good in May 2021

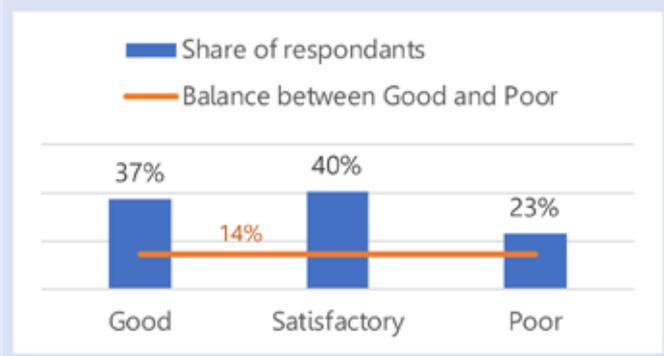
Between the end of April and the end of May 2021, ITMF conducted the 8th ITMF Corona-Survey. Two central questions – which are going to be asked also in future ITMF surveys on a regular basis – are about the current economic situation (May 2021) and the economic expectations in six months' time (November 2021, see part (II) on page 7).

Graph 1 illustrates that most companies judged their business situation in May 2021 as satisfactory (47%) or good (37%). A smaller percentage of 23% found itself in a poor business situation. When comparing the good with the poor respondents, the balance is positive (+14 percentage-points).

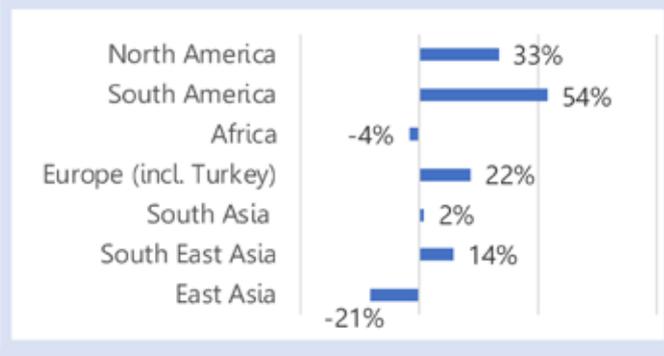
The survey reveals regional disparities.

The regional perspective reveals that the business situation is different from region to region (see Graph 2). On the one hand, companies in South and North America for example experience a very good business situation (the balance between good and poor is +54 and +33 percentage-points, respectively). On the other hand, companies in East Asia have a negative balance between good and poor respondents of -21 percentage-points. This is surprising as companies in East Asia were hit first but also overcame the Corona-pandemic first and are benefiting both from the recoveries in their own countries and - with a time-lag - also in important exports markets like Europe and the US.

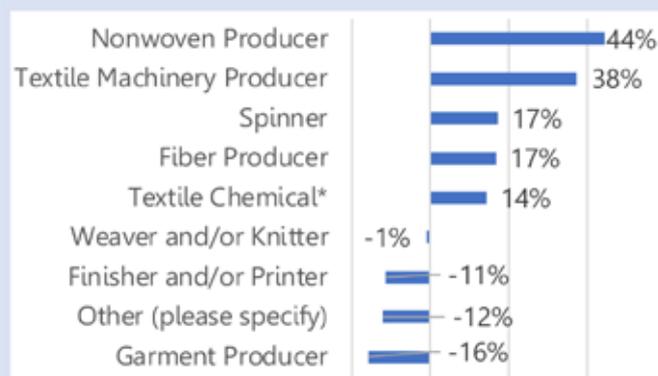
Graph 1: Global situation



Graph 2: Regional situation



Graph 3: Situation by segment



*incl. Dyes and Auxiliary Producer

Upstream segments find themselves in a relatively better situation

A closer look at the various segments along the textile value chain provides an interesting picture (see Graph 3). Upstream segments – fibre and yarn as well as nonwoven and textile machinery producers – find themselves generally in a good business situation, while the downstream segments – weavers/knitters, finishers/ printers, and garment producers – have a negative balance between good and poor.

(Continued on Page 7)



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**SPECIAL
FEATURE**

The 8th ITMF Corona-Survey

by Dr Christian Schindler, Director General, ITMF

(II) Good days ahead expected in the textile value chain

Between the end of April and the end of May 2021, ITMF conducted the 8th ITMF Corona-Survey. Two central questions inform about the current economic situation (May 2021, see part (I) on page 6) and the economic expectations in six months' time (November 2021).

The business expectations in six months' time from the survey (i.e. November 2021) are considerably better than the current business situation presented in part (I).

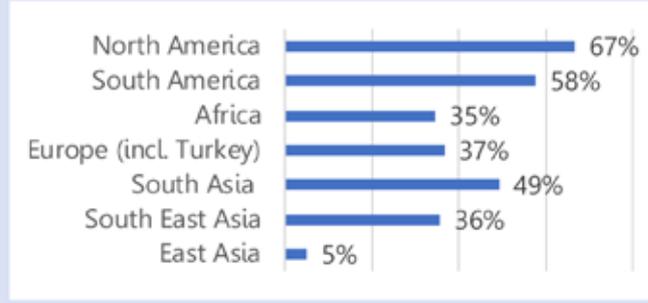
More than half of all respondents (57%) is expecting a more favourable business by November 2021 (see Graph 1). Only 16% are expecting a less favourable business with 28% expecting business to be unchanged. The balance between more and less favourable business is +41 percentage points.

When looking at the different regions, respondents' replies show that the balance between more and less favourable business expectations by November 2021 is positive in all regions. The balance is more than +35 percentage points in all regions except for East Asia (+5 percentage points, see Graph 2).

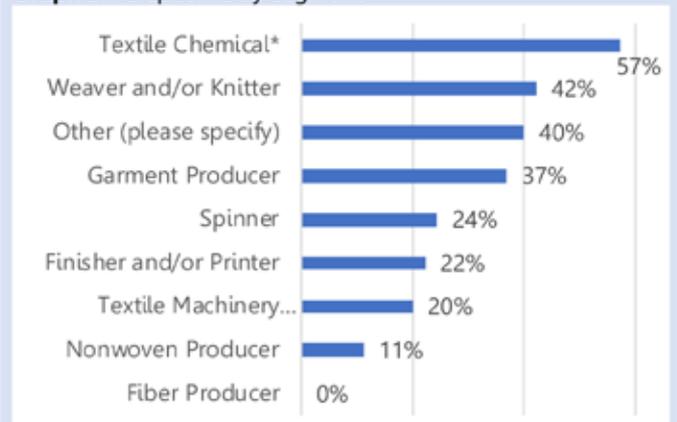
Graph 1: Global perspective



Graph 2: Regional perspective



Graph 3: Perspective by segment

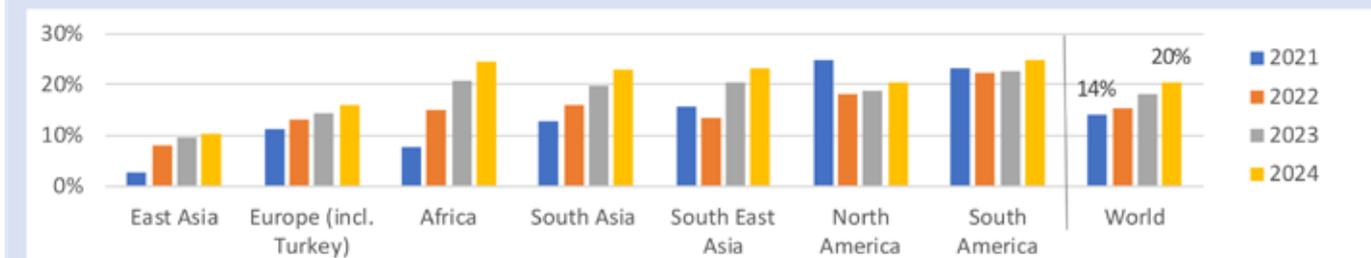


*incl. Dyes and Auxiliary Producer

A look at the different segments (see Graph 3) reveals that downstream segments expect business to be more favourable by November 2021. Upstream segments, which find themselves already in a good business situation in May 2021, are expecting improvement to a lesser extent (albeit from an already higher level).

The survey's participants were also asked about their long-term view regarding the development of turnover (Graph 4).

Graph 4: Turnover growth expectations for 2021-2024, compared to 2020

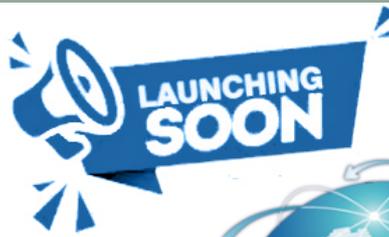


Source: 8th ITMF Corona-Survey (April 26th-May 27th, 2021)

On a global level and on average companies are expecting in 2021 an increase of +14% compared to 2020. By 2024 turnover is expected to be +18% higher than it was in 2020.

Regionally, there are again some interesting differences. Especially North and South America are expecting a strong upswing in 2021 (+25 and +23%, respectively), whereas the expected increase in East Asia is very modest (+3%), albeit from a higher level in 2020. Further into the future, all regions are equally optimistic (between +23 and +25%) except for East Asia and Europe (+10 and +16%, respectively).

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Marketplace is user friendly, professionally designed and managed by an expert team. Marketplace has combined several features to showcase strengths of each of the subscribers. The concept is more of connecting Indian exporters of cotton textiles with the importers worldwide on real-time basis.

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- Enquiry Form for connecting with User

GOLD Package

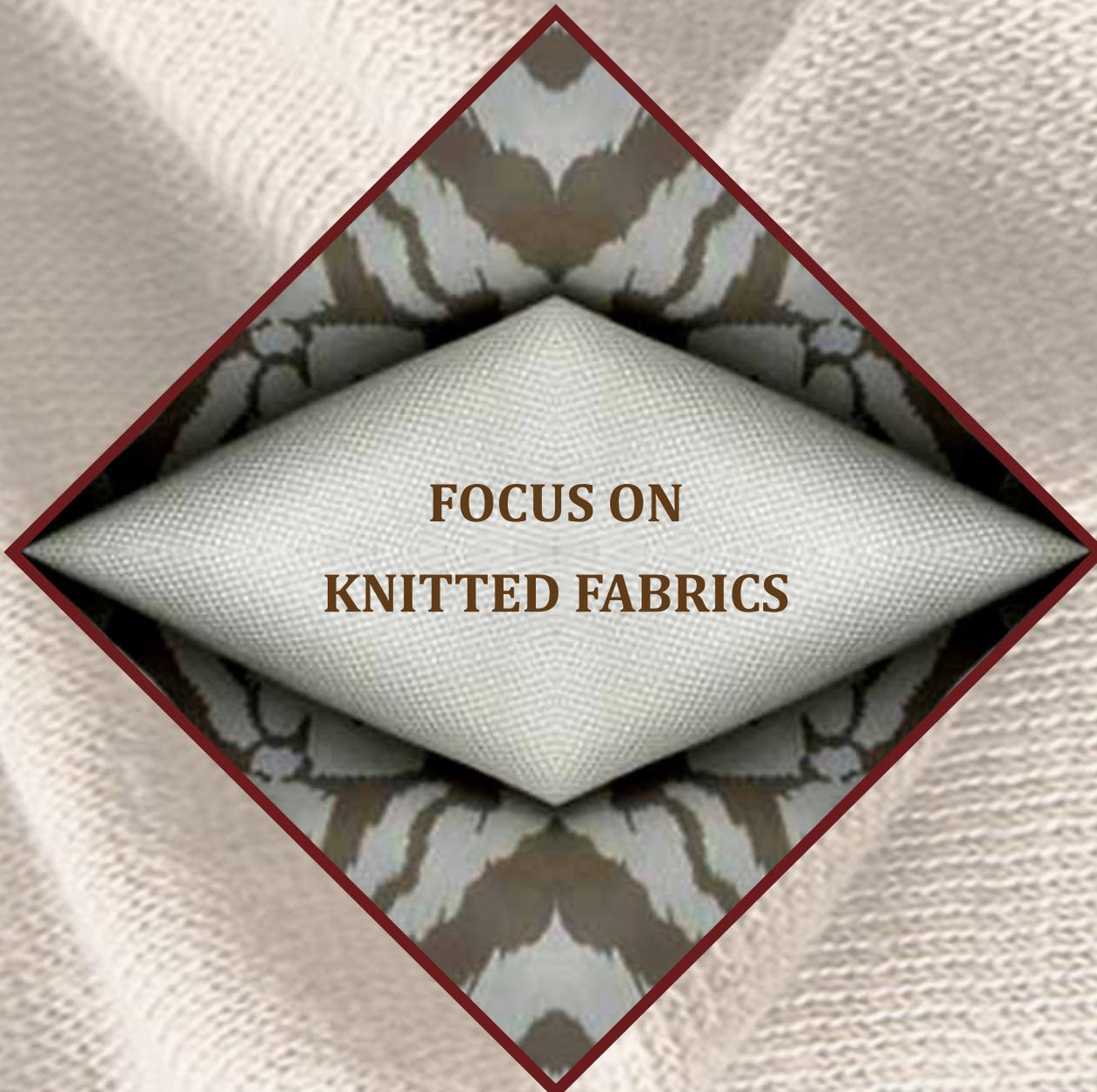
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**FOCUS ON
KNITTED FABRICS**

Good days ahead in the markets for knitted fabric and large circular knitting machines



Article By

Dr. Olivier Zieschank
Director, ITMF

**INTERNATIONAL TEXTILE
MANUFACTURERS FEDERATION**



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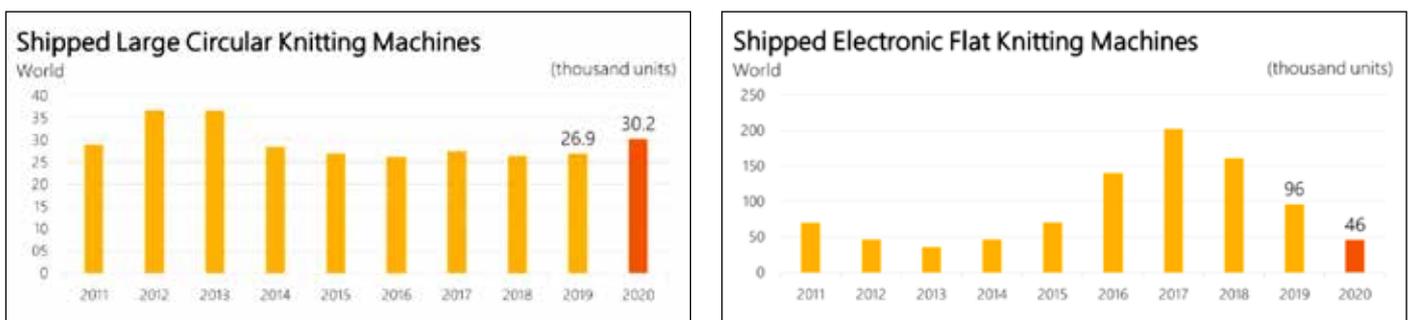


Good days ahead in the markets for knitted fabric and large circular knitting machines

Article By **Dr. Olivier Zieschank**
Director, ITMF

The fabric industry was already hit by the increase in yarn prices for the past many months but the recent Covid surge and subsequent The latest International Textile Machinery Shipment Statistics (ITMSS) shows that shipments of electronic flat knitting machines decreased by -52% in 2020 compared to 2019. This drop in deliveries follows a trend that started in 2017 when a record 200 thousand units were shipped globally (see Graph 1). To the opposite, shipments of large circular knitting machines grew by +12% in 2020 compared to 2019. 2020 was a new record year since 2014 (see Graph 1).

Graph 1: Shipments of Large Circular Knitting Machines and Electronic Flat Knitting Machines



Source: ITMF, International Textile Machinery Shipment Statistics (ITMSS) Vol. 43/2020

The share of electronic flat knitting machines shipped to Asia and Oceania also strongly decreased in 2020. China's share even dropped by -34 percentage points, from 72% in 2019 to 38% in 2020. The country nevertheless remained the main destination for electronic flat knitting machines with 17'400 deliveries. Other main investors are Bangladesh (5'800 units), Turkey (3'700 units), India (3'200 units), and Vietnam (3'000 units).

The share of large circular knitting machines shipped to Asia and Oceania has steadily decreased since 2012, from 92% to 82% in 2020. At the same time, the share of deliveries to China have fluctuated. It dropped faster than the regional trend from 2012 to 2017 (when it reached 40% of global shipments) and then started to grow again to reached 53% in 2020 (or about 16'000 deliveries).

Explaining these long-term cycles in shipments is a difficult task. Nevertheless, understanding the global increase in shipments in 2020 might not be out of reach. During ITMF's Virtual Textile Machinery Forum 2021, Mr. Benjamin Mayer, General Manager of Mayer & Cie., stated that 2019 and 2020 were, indeed, difficult years for the large circular knitting market due to the US-China trade conflict and the effects of the Corona pandemic. Nevertheless, a sudden market increase was observed in August and October 2020. The combined effects of low order intake at the beginning of the year and the boost that occurred in Q4 2020 was positive. Moreover, the segment of large circular knitting machines was the only segment of the textile value chain which grew that year (see Table 1).

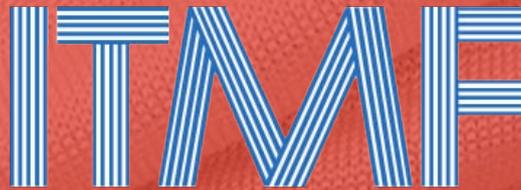
**FOCUS ON
KNITTED FABRICS**
**Good days ahead in the markets for knitted fabric
and large circular knitting machines**

**INTERNATIONAL TEXTILE MANUFACTURERS FEDERATION
FEDERATION INTERNATIONALE DES INDUSTRIES TEXTILES
INTERNATIONALE VEREINIGUNG DER TEXTILINDUSTRIE**

Table 1: Change in shipments between 2019 and 2020, by machine category

Machine Category	Change 19-20
Large Circular Knitting Machines ¹	12%
Weaving Machines ²	-14%
Finishing Machines ³	-17%
Open-End Rotors	-26%
Draw Texturing Spindles ⁴	-30%
Short-Staple Spindles	-48%
Electronic Flat Knitting Machines ⁵	-52%

Source: ITMF, International Textile Machinery Shipment Statistics (ITMSS) Vol. 43/2020

Growth in demand for large circular knitting machines started in the Chinese market in Q3 2020 and rapidly spread to the whole world. Investments in new textile machinery was steadily increasing at that time and money flows strengthened across the globe. Mr. Mayer explains that it is still difficult to understand the cause for the sudden market change in late 2020. Two hypotheses are brought forth, though. On the one hand, substitution from suits and formal attire to casual wear due home office habits might have boost consumption of knitted fabric. On the other hand, it is possible that there was backlog of demand.

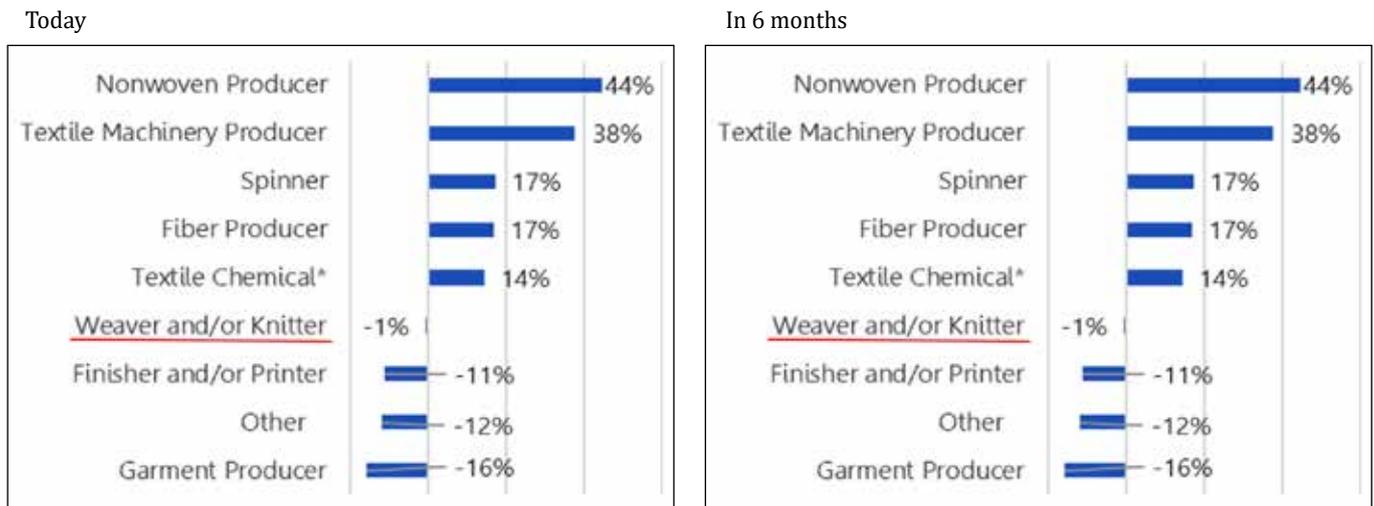
While the past is hard to understand, the future is even more difficult to predict. It seems, however that there is a chance for consumption of knitted fabric to continue growing in 2021. This is, at least, what was expected in May 2021 by the participants the 8th ITMF Corona-Survey who identified as "Weaver and/or Knitter". In this survey, textile manufacturers from around the globe were asked how their current business situation was and how it would be six months later.⁶ As one can see in Graph 3, the business situation for "Weaver and/or Knitter" in May 2021 was rather gloomy and the segment ranked in 6th position amongst other industries in the textile value chain. However, "Weaver and/or Knitter" expect a much better situation in November 2021. They are very optimistic, and their business situation should even rank 2nd in the value chain at the end of the year.

1. Large Circular Knitting Machines entail "Double (26 inch or over), Double (up to 24 inch), Single (26 inch or over), Single (up to 24 inch)"
2. Weaving Machines entail "Shuttle-less Looms: Air-jet, Rapier & Projectile, Water-jet"
3. Finishing Machines entail "Fabrics Continuous (Wovens & Knits): Bleaching - Line, Dyeing - Line (CPB), Dyeing - Line (Hotflue), Mercerizing - Line, Relax Dryers / Tumblers, Sanforizers / Compactors, Singeing Line, Stenters, Washing (stand-alone)" and "Fabrics Discontinuous (Wovens & Knits): Air Jet Dyeing, Jigger Dyeing / Beam Dyeing, Overflow Dyeing"
4. Draw Texturing Machines entail "Double Heater" and "Single Heater"
5. Electronic Flat Knitting Machines entail "Flat Knitting Machines 70 inches and over" and "Flat Knitting Machines up to 70 inches"
6. Possible answers were Good, Satisfactory or Poor. The resulting indicator, called the balance between Good and Poor, is simply the share of respondents who answered good minus the share of respondents who answered Poor.

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Graph 3: How do you describe your market situation today and in 6 months?



Balance between "Good" and "Poor"
*incl. Dyes and Auxiliary Producer

Source: ITMF, 8th ITMF Corona-Survey (April 26th-May 27th, 2021)

There are reasons to believe that 2021 will be a good year for the markets of knitted fabric and large circular knitting machines. In the long run, though, as Mr. Mayer also notes, what counts is that population and an increasing middle class (i.e., the main determinants for growth in garment consumption) are steadily growing.

To learn more about **the shipments of individual machine types by country of destination** in the newly published **ITMSS Vol. 43/2020**

[CLICK HERE](#)

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A painting of The Prince of Wales, made in 1921, depicts him in his Fairisle knitted jumper, a mainstay of the iconic knitting styles.

Source: Sustainable-fashion-collective.com

How Knitwear hit the market?

Knitting is believed to have originated in the Middle East in the 5th century and travelled to Europe with wool traders soon afterwards. Interestingly, the examples of early knitting from Egypt are actually made from cotton fibres, not wool. Many of them have Arabic blessings knotted into them, or symbols to ward off bad luck. In the 14th century, the knitted textile form was used by fishermen to make warm, woolen, weatherproof jumpers for trips to sea. By the 16th century, knitting machines were used to knit hosiery for elite classes.

Knitting soon became a local industry in Highland and Scotland, employing men in factories to knit stockings that were exported to the rest of Europe. Soon hats, shawls, bags, jumpers and other form of knitwear were available in the market. The first knitting loom was built in 1816 and woolen mills were setup to create expensive garments. Eugene Rodier setup the first woolen textile factory in 1853.

By 20th century knitwear was a part of mainstream fashion. With the introduction of jersey dresses, cardigans and jumpers by fashion labels like Chanel, knitwear was a practical, fashionable and modern choice for men and women.

Source: Twitter.com

From the Middle East to Chanel - @OffetWarehouse look at how #knitwear hit the market

Future of Knit Textiles



Article By
Shri Pranav Dave
Chief Marketing Officer
ARVIND LTD.



FOCUS ON KNITTED FABRICS

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KNITTED FABRICS



Future of Knit Textiles

Article By Shri Pranav Dave,
Chief Marketing Officer, Arvind Ltd.

This Challenging times due to Pandemic has struck the world with increased demands in knits particularly two categories. First being Comfort dressing with embedded performance for all WFH categories and Second Active sportswear for health wellness benefits, both categories have become an essential part of Today's wardrobe.

In Domestic(Indian) apparel similar to global markets, casualwear categories like athleisure and lounge wear are witnessing significant acceleration owing to 'work from home' and fitness needs of consumers. Social media and other online channels emerging as dominant influencers too. Consumers resists buying formal, occasional and party wear as the pandemic prompts them to spend more time indoors. These factors are making knits a very potential business market.

Increasing awareness about leading a healthy lifestyle and about the health benefits of fitness activities like swimming, yoga, running, and gyming are expected to drive the market. Increasing popularity of sports events i.e, Olympic Games various National leagues across sports are also boosting the growth of this market. Rise in work-related health issues, such as stress and obesity, are also pushing more people to follow any sport and fitness activity, which is further increasing the demand for trendy and comfortable sportswear. With all this change in consumer behaviour , the global sportswear market size was estimated at USD 239.78 billion in 2018 and is expected to register a CAGR of 10.4% from 2019 to 2025.



Companies in the United States, Canada, Europe, and Australia have been hit with supply chain shocks as the flow of materials from China was disrupted by the pandemic. It is undergoing rapid and perhaps permanent transformation. Compared to other Asian manufacturing countries.

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Future of Knit Textiles



India is one of the biggest economy and turns out to be a major beneficiary. It has the largest untapped potential for filling part of the supply chain vacuum that was created by exodus from China. The Government of India too is pushing for MMF through PLI scheme, growing demand globally and supply base shift away from China likely to fuel the growth of Synthetic Textiles in Indian markets. Companies with such capabilities will benefit the most.

Sustainability is at core of Arvind Philosophy and is imbibed in every process of fabric manufacturing. Our product basket for 'Eco Friendly Fashion' at Arvind has many concepts, to name a few - right from BCI, Organic cotton, recycle cotton, recycle polyester, fabrics from Post & Pre Consumer Waste, Sustainable Blends, Eco finishes to Compostable Rotary Ecoprint solutions, we have it all.

The newly launched Arvind Innovation Lab offers new, exciting and trendsetting lifestyle and fabric solutions. Every new product is made after immense market research and development by specialised team. We continuously work to improve our product portfolio.

Our fabric collections range from cotton, cellulose, linens, polyesters to multi fibre blends. Our products are further enhanced by performance finishes and functional finishes giving it a value add. We are well equipped to do structures for all seasons i.e., waffles, variegated ribs, plated, single jersey, interlocks, piques, honeycombs, ottoman, double Jersey, french terry and fleeces.

Creative collaborations between brands, artisans, designers, and online communities, will be the route the industry will take to reinvent the way it creates and trades in the near future. Digitised design is seen to go mainstream, opening up new retail channels and boosting the importance of customisation, flexible design & Flexible Production cycles.

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**Arvind Innovation Lab
Offers New, Exciting & Trendsetting
Lifestyle and Fabric Solutions**

Indian Knitting Industry with Competitiveness, Growth, Sustainability and Technology



Article By

Shri Devadas Dhamodaraswamy
Chief Technology & Business
Development Officer
LOYAL TEXTILE MILLS LTD.



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Indian Knitting Industry with Competitiveness, Growth, Sustainability and Technology

**Article By Shri Devadas Dhamodaraswamy
Chief Technology and Business Development Officer
Loyal Textile Mills Ltd.**

Global Market Trends in Knitted Fabrics

Global market for knits is projected to grow by a CAGR of 4.6% and expected to reach US\$ 66.9 Billion by 2023. 45% of this is projected to be in Synthetics & Blends. About 70% in Weft knitted and 30% in Warp Knitted. By 2027, Warp Knitting segment may overtake Weft Knitting. Most of the Synthetics are knitted in warp knitting machines. There is a sudden growth in Active Wear segment. Work from home as a new normal will spur the demand for knits. Attention to Personal hygiene will show increased interest in Anti-Viral, Anti-Fungal, Anti-Microbial and Anti-Bacterial finishes in inner and outer knit garments. 100% Cotton knitwear segment will absorb more volumes in Organic & BCI Cotton. Most brands are focusing on Eco Friendly, Recycled products including Post-Consumer waste recycled knits. Sustainability is the latest Buzz Word. Euro regulations on Fire Retardants may spur demand for inherent and treated FR knit garments. Most western buyers and brands are seeking to increase imports from countries other than China.

Indian Knitted Fabric manufacturing

India's exports are a mere 3-4% of Global demand for knits. Almost 90% in Cotton and Cotton blends. 95% of our production base is in Weft (Circular) Knitting. In the Domestic Market, our knit industry is catering mainly to Men's inner wear, Children's knit garments & T shirts. Recent innovations in Viscose Women's leggings is a big boon. However, capacities for blends and Synthetics remain very low. We have neglected Warp Knitting, heavier goods, functional garments like Dry Fit etc. We have never explored into 3D Knits, Technical garments and value added segments like Athleisure. Most of our circular knitting machines are using 100% Cotton or Blends in Spun Yarn. We do not use Filament yarns at all whereas filament knits are dominating functional garment markets where our exports almost nil.

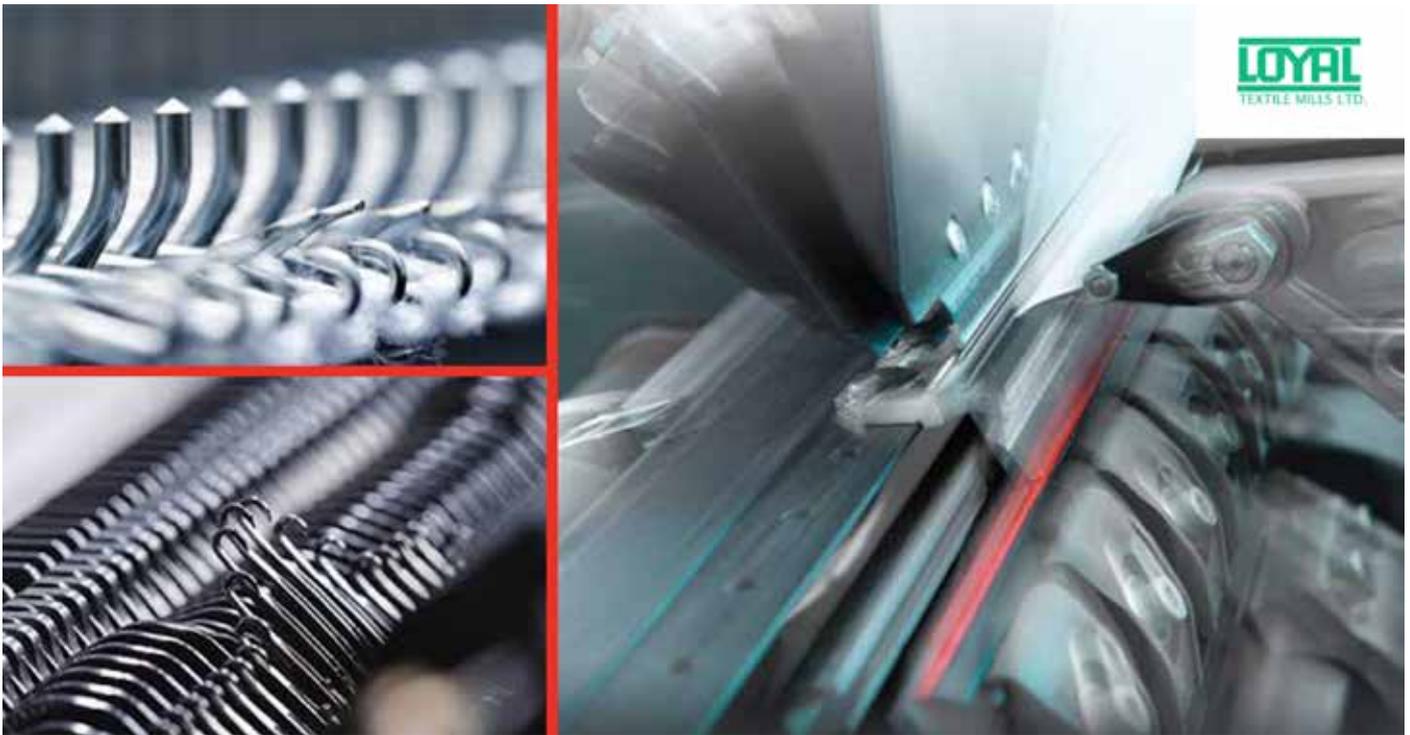
Domestic Market in India for Knits

Wazir Analysis, projects that India's domestic apparel market is expected to grow at a CAGR of 12% between 2020-2025, thereby surpassing Japan by 2021-2022. This growth rate is seen as the highest amongst all the leading consumers in Textile and Apparel sector i.e., USA, EU and Japan. A major portion of this growth rate is expected to be in Knit garment segment due to work from home culture and casual and athleisure segments. Hence focussing internally will yield results for our Knitting Industry especially in Women's tops, bottoms and innerwear.



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Indian Knitting Industry with Competitiveness, Growth, Sustainability and Technology



Other Exporting Countries and their Focus

China as an allrounder is offering whatever the market demands and hence has a pie of about 18-20% of global knit market. Taiwan is mostly catering to Synthetic filament-based athleisure knit segment. Bangladesh & Sri Lanka rely on cost effective production and are able to cater to about 16% of the Global market. ASEAN countries led by Vietnam, Indonesia and Thailand offer a mixed basket – but shifting towards value added products are exporting about 18%.

Way Forward

- India's capacity building in Weft Knitting (Circular):
 - a) Open Width machines with Spandex
 - b) Special machines like Strippers, Jacquard, Rib, Terry, Pique & Fleece.
- Investments in Knit Prints (Rotary, Transfer and Digital), Heat setting stenters, Brushing, open width processing will help in both domestic and export markets.
- Automation in Dyeing (low liquor ratio), Lab, Dye Kitchen, Auto dispensing in dyes & chemicals and Colour matching is must.
- Focus on Organic / BCI Cotton & shifting towards sustainable products like Eco Friendly, Waste Recycled, Post Consumer Used garments recycled will also help.
- Investing in artificial intelligence technology, IoT technology etc to improve production efficiencies & reduce costs.
- Apply Industrial Engineering techniques in knit garment manufacturing for efficient production to optimize costing based on Sri Lankan and Bangladesh models.
- Build capabilities in Anti-Viral, Anti-Fungal, Anti-Microbial and Anti-Bacterial finishes with Silver, Copper and Graphene based non-leaching products for special finishes.



FOCUS ON KNITTED FABRICS

Indian Knitting Industry with Competitiveness, Growth, Sustainability and Technology

Suggested Course Corrections

- Invest in Direct Garment making from post-consumer recycled yarn from used garments. Focus on Sustainable products like Bio-Degradable Polyester, PET bottle recycled Polyester with special whiteness finishes, Dope dyed RECYCLED POLY melange, Modals, Micro Modals, Tencel, Bamboo, Linen and blends thereof.
- The warp knitted fabrics segment is expected to be the fastest-growing segment going forward at a CAGR of 5.0%. India needs to expand into Warp Knitting with Synthetics in 3D and heavier knit segments. The latest trend in knitted fabric has created considerable demands on advanced 3D technology. Knitted textiles are used mainly in industrial functions. The material can incorporate medium, carrier, and interface functions for a vast array of industrial applications. The 3D textiles, combined with several matrices, are used as reinforcement materials to make textile structural composites. The market for such composites is primarily derived from various areas such as civil engineering and the military.
- Synthetic filament knit goods in weft knits (circular). Innovate in fire retardant, anti-static and other technical knitwear to diversify the product segment base. Modacrylic, Aramid and other technical fibres for value added knits.
- Smart textiles are gaining ground in knitwear also especially in fashion, entertainment, medical, transportation, sports and fitness, and military. Smart fabrics are that can interact with their environment and respond to a physical stimulus including those from mechanical, electrical, thermal and chemical sources. Sensors, actuators are the



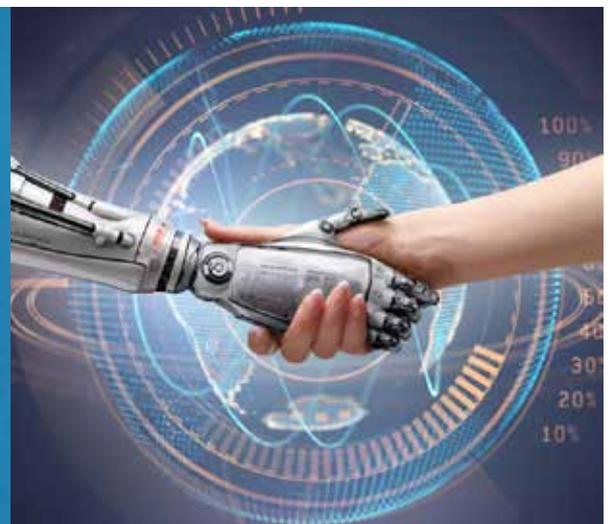
major components of smart fabrics. The materials used in smart fabrics include optical fibres, metals and conductive polymers. An example of smart fabrics is D-Shirt offered by French company Cityzen Sciences, which comes with a wide range of functions to record body temperature, heart rate, GPS location, route, altitude and speed.

- India exports about USD \$ 348 Million to US \$ 369 Million worth of Knitted greige and finished fabrics (mainly to Sri Lanka, USA and Bangladesh) whereas this can be doubled by exporting to emerging Garment manufacturing destinations like Vietnam, Cambodia, Myanmar, South American Countries, Caribbean & Africa. Indian industry needs to focus of knitted greige and finished fabric exports instead of spun yarn exports.

Conclusions

- Focus on broad basing the production capacity, cost efficient production and diversifying into new segments
- Exploit the potential for India substituting China as an allrounder in Knit exports with course corrections – Most importing countries are looking to buy more from countries other than China. Let us make 'Not Made in China' as a buzz word and 'Made India' as a Global Brand. World is an Opportunity for India. Let us build a New India for a New World with Competitiveness, Growth, Sustainability and Technology
- Looking inwards to serve the largest growing Clothing and Apparel market in knits – "India"

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Overview of Knitted Fabrics Market



Article By

Shri Umesh Toshniwal
Vice President - Marketing
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Overview of Knitted Fabrics Market



**Article By Shri Umesh Toshniwal
Vice President – Marketing, Nitin Spinners Ltd.**

Introduction of Knitted Fabrics

Knitted fabrics are the result of inter-looping of yarns or inter-meshing of loops. Knitted fabric is flexible and is more readily constructed into smaller pieces, hence it is very much ideal for Socks, garments, innerwear, sportswear, stockings, etc. The knitting industry has various reasons for growth, as the capital investment for starting a new industry is relatively lower than that required for any other production factory. The machine productivity is higher in the case of Knitted fabric and the setting up of knitted fabric production machine is much faster and simpler than any other operation.

Knitted fabric is more comfortable to wear and is more permeable to air which makes it suitable for intimate apparel like underwear whereby the garment next to the skin can 'breathe'.

Due to the various qualities of knitted fabric, it is the best suitable choice for sportswear, intimate apparel, and garments next to skin. The knitting industry has changed the entire scenario of the Textile Industry and the Knitted Fabric Market has its own identity.

Overview of Knitted Fabrics Industry

The companies in the knitting industries are involved in knitting weft (circular) and warp (flat) fabrics. There are various finishes done over knitted fabric that improves its appearance, properties and serviceability, fabric dyeability, and garment comforts.

These companies may do only knitting, only finishing or knitting as well as finishing and further fabricate fabric products (except conversion to garments).

Various studies show the various value of the global knitted fabric market size, but the most common indication in all reports is significant growth in the forecast period. The growing apparel industry is one of the major factors driving the market. Furthermore, the shifting of consumer preference for lightweight and high-performance fabric is fueling the demand for knitted fabrics.

Over the past few years, the knitted fabric industry has been witnessing steady growth in demand for feather-light circular knit fabrics due to the better breathability of the material. Lightweight knitted textile has also gained significant traction in the protective clothing market. Sponge-like, anti-tear, and durable materials are applied in single or double layers in the protective clothes.

The growth in the apparel manufacturing market attributed to demand from young consumers, their spending on clothes and high disposable income, increased the demand for knitted fabrics, had a positive impact on the global knitted fabrics market.



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Overview of Knitted Fabrics Market

In addition, the application of knitted fabric has been increasing in denim garments, as consumer preference is shifting towards wrinkle-resistant, flexible, soft, and comfortable textiles. The rising importance of synthetic fibers in the construction and apparel industries is expected to propel the growth of the market in the upcoming years. Application of the fiber has been expanding in the construction industry as geotextiles in roofs, walls, dams, and roads.

Knitted Fabrics Market Trends

Major trends influencing the Knitted Fabrics market include:

Eco-Friendly Fabrics

The demand for eco-friendly fabrics is increasing due to rising awareness of global warming and the need to protect the environment. Eco-friendly fabrics are made from environmentally-friendly materials such as organic cotton, organic linen, Tencel, and recycled materials. The manufacturing process of these fabrics does not involve harmful chemicals or dyes generally used in fabric manufacturing.

Knitted Fabrics Market Segmentation

The Knitted Fabrics market is segmented by type of material, end-user, construction type, and geography.

By Material Type- the Knitted Fabrics market can be segmented by type of material

- a) Synthetic Fibres, Dyed
- b) Pile Fabrics
- c) Elastomeric Yarn
- d) Cotton, Dyed
- e) Synthetic Fibres, Printed
- f) Artificial Fibres, Dyed
- g) Lace
- h) Others

Synthetic Fibres, Dyed was the largest segment in the global knitted fabrics market at 19.3% of the market and was worth about \$10.8 billion. This can be attributed to the large-scale use of knitted fabrics made of dyed synthetic fibers in apparel.

By End-User - The Knitted Fabrics market can be segmented by end-user

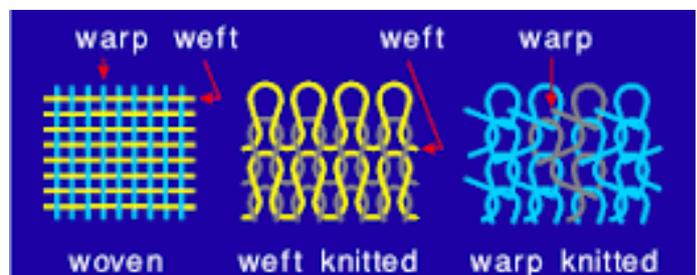
- a) Fashion & Clothing
- b) Technical
- c) Household

The market size is mainly attributed to the high demand for knitted footwear, the adoption of sportswear and casual-wear globally, and the high popularity of knitwear among the millennial population.

By Construction Type - The Knitted Fabrics market can be segmented by type of construction

- a) Weft
- b) Warp

The weft-knitted fabrics market was the largest segment of the knitted fabrics market.



By Geography- The Knitted Fabrics market is segmented into

- o North America
- o Western Europe
- o The Asia Pacific
- o Eastern Europe
- o South America
- o the Middle East
- o Africa

ASIA PACIFIC was the largest region in the knitted fabrics market, accounting for 78% of the global market in the year 2018. It was followed by North America, Western Europe, and then the other regions. Going forward, the fastest-growing regions in the knitted fabrics market will be the Middle East and Africa.

RECOMMENDATIONS IN THE KNITTED FABRICS MARKET



The knitted fabrics market size will gain the most in The Asia Pacific. Market-trend-based strategies for the knitted fabrics market include investing in artificial intelligence technology, adopting 3D knitting machines, investing in IoT technology to improve production efficiencies and reduce costs, and developing flame retardant fabrics that are economically priced.

To take advantage of these opportunities, it is recommended that the knitted fabrics manufacturing companies focus on manufacturing weft-knitted fabrics, outsourcing business to low markets, expanding through partnerships and collaborations, and manufacturing eco-friendly fabrics, among other strategies.

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Knitting the Success Story



Article By

Shri Mohit Maheshwari

Vice President

MARAL OVERSEAS



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Knitting the Success Story

Find Fabric
Style Yourself

Article By Shri Mohit Maheshwari
Vice President, Maral Overseas

Textiles are defined by the yarns and threads that create them. Historically speaking, textiles have been used for the last 100,000 years. Two different manufacturing processes of textiles emerged as the main types are woven and knitted. Almost similar yarns are used for producing these fabrics but its the difference of their structures and end uses that differentiate both fabrics far apart.

Knitted fabrics are made by one continuous thread assisted by needles, to create interlocking loops, instead of the multiple warp yarns used in woven fabrics. Technology of knitting machine is evolving fast and range of machine includes single feeder small dia machine to wide dia high speed machine. Knitting machine can be broadly classified into two technologies.

- Circular knitting machine (fabric used for making T shirts)
- Flat Knitting machine (fabric used for sweaters, Collars & Cuffs)

In today's world, demand of knitted fabrics is increasing continuously as they are found to be more comfortable, easy to maintain, more stretchable and with better temperature control.

Knitted fabrics that are generally used in clothing that require changes in shape and play a major role in the apparel sector. Market for knit fabrics is segmented into intimate wear, lounge wear, casual wear, socks, leggings, ports wear, leisurewear, yogawear, sleepwear and many others. More advanced uses of Knit fabrics are in various industrial use, medical use and protective work wear, denims etc.

The global knitted fabric market size is expected to be approx. USD 28 billion and is expected to witness continuous growth in the coming years. The noticeable shift from formal wear to casual wear

and shortening life cycle of garment are few of the major factors driving the market. Furthermore, the increasing importance of knitted fabric in the automobile, construction, manufacturing, and medical sectors is expected to fuel market demand over the forecast period.

Knitting is world of structures

Knitting fabrics can be produced through wide combination of cams in various simple and fancy structures. Most popular structures of knit fabrics are Single Jersey, Rib, Terry, Fleece, Interlock, Piquet, Waffle, Ponte-roma, Flat backs, Pleated etc. All these fabrics can be produced in various possible blends like 100% cotton, Cotton Polyester, Cotton Modal, 100% Polyester, 100% Viscose or any other possible blends. Every structure has its unique properties and specific end uses. This wide range of availability and flexibility gives garment makers a perfect choice to select most suitable fabric for their garments.

Knitting is comfortable

Woven fabrics are less stretchable due to the fact that it's tightly woven threads or independent yarns. Because there is no single straight line of yarn anywhere in the pattern, a knitted piece of fabric can stretch in all directions. This elasticity is all but unavailable in woven fabrics which only stretch along the bias. One of the key differences between knit fabrics and woven fabrics is the amount of stretch that each fabric gives. Knit fabric stretches a lot when pulled by its width and some stretch when pulled by its length. Wovens, on the other hand, will give almost no stretch except on the diagonal.

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Knitting the Success Story



Knitted fabrics are naturally stretchable in many directions. Its stretch is further improved by use of spandex yarns on alternate or all feeders. These attributes makes knit fabrics much more preferable choice for all body hugging garments and all performance related comfort wear.

Knitting is fashion

Knitted fabric is not just comfortable, but highly fashionable. It is easy to compliment knitted fabric garments with various add-ons like fancy prints, yarn dyed, melanges, cut & sew, embroidery, heat transfers, tie & dye etc. which makes the knitwears contemporary and fashionable.

Knitting is active

Being fit & active is new fashion mantra and knit fabrics is an all time companion. Whether it is yoga or meditation, jogging or running, tennis or cricket, amateur or professional, knit fabric is the new official dress code for all active wear.

It's not just the comfort but science of innovative knitting structures and available advance fabric finishes like anti-microbial, anti-viral, wicking, UV protection etc which makes knit fabrics a perfect choice for active wear.

Knitted....Well fitted

As explained above, natural stretch and extra stretch with spandex, makes knit fabrics a preferred choice for body hugging tops, innerwear, leggings etc and demand of knit fabrics is increasing in all these segments.



THE RESULT

Demand for knit fabrics is increasing faster than any other type of fabrics for the following reasons:

- Knitted fabric is available in wide range of structures.
- Knitted fabric is fashionable and with wide scope of new innovations.
- Knit fabrics garments are more comfortable than any other garment types.
- Knit fabrics are mostly easy care.
- Knit fabrics are highly breathable.
- Investment required for starting a new knitting unit is lesser comparatively over other fabric units.
- Production of knitted garment is simple.
- Knitted fabric has wide range of applications.
- Knit fabrics are naturally wrinkle resistant.
- Knit fabrics have wide range of GSM.
- Knit fabrics have wide range of width for better recovery.
- Knit fabrics are available in both options of tubular & open width.

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Knit Fabric – An opportunity for India



Article By

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Director

TECHNOCRAFT INDUSTRIES (INDIA) LTD.



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Knit Fabric - An opportunity for India

Article By Shri Ashish Saraf
Director, Technocraft Industries (India) Ltd.

Over the past 10 years, fashion has changed quite dramatically, where applications of knit fabric in fashion, has been revolutionized in a way. I doubt that, in the 90s, one could imagine wearing a full suite made of knit fabric, or even a traditional buttoned shirt made from knit fabric. The recent pandemic, has forced many of us to shift our working style, and adapt to the new normal which is "Work from Home". With this shift in lifestyle, the preference for a more comfortable and breathable fabric material during working hours has emerged, being the knit fabric.

Our foray into knits, why, how we did it, and what were our growth enablers?

Technocraft started its textile business with a spinning mill, initially of 15000 spindles, producing cotton yarn. We primarily focused on hosiery yarn, with a count range of 20s to 40s, which is widely used in knit fabric. We stumbled upon an opportunity to forward integrate into fabric and readymade garments. In 2004, we bought over the manufacturing assets of a closed down garment company in central Europe, and installed the knitting, dyeing, and garmenting together with our spinning mill near Bombay. We took a conscience decision to get into knit fabric, since we already had a raw material (cotton yarn) manufacturing well established for knit fabric.

Since then, we have grown and diversified substantially.

About 6 years ago, we undertook a complete technological upgradation, and replaced all our old machines, with brand new, state of the art, knitting, dyeing, finishing, and printing machines.

- We now produce close to 600 tons per month of high quality cotton yarn with our most modern spinning mill with 30000 spindles equipped with the latest Rieter machinery.
- Set up a new mill of 30000 spindles to produce 400 tons per month of melange yarn, and fancy yarns, and 200 tons per month of fibre dyeing.
- Knitting capacity of 600 tons per month with open width lycra machines.
- Dyeing, and printing capacity of 400 tons per month.
- Readymade garments approximately 500,000 pcs per month.
- State of the art Zero Discharge water treatment system, complying with the highest environmental standards.
- Most modern fabric testing laboratory equipped with James Heal testing equipment. This lab is now M&S accredited.

We now produce a wide variety of knit fabric, like cotton, cotton lycra, viscose, modal, poly cotton blends, etc. We work with leading global brands like H&M, C&A, M&S, Tesco, LIDL, Tchibo, Nike, Garan, Walmart, Levis, Jockey and several others.

FOCUS ON KNITTED FABRICS

Knit Fabric – An opportunity for India



What we learnt about the knit fabric business?

During the past 15 odd years in the knit fabric business, we went through several problems and challenges, which taught us valuable lessons. These lessons have helped us to reach where we are today. I want to share a few important ones here.

- Do not compromise on technical talent. Hire the best
- Be fully self-reliant on water treatment. Water is the oxygen for the fabric mill, and by the far the most crucial part of utility for the production of fabric.
- Design the plant to be as flexible as possible, so that you can quickly react to market demands, which are now changing at faster pace than before.
- Go for the best technology in the market. It pays itself back over the long term with the highest efficiency, lowest utilities consumption, and highest uptime.

What we see in the future for knit fabric?

Sustainability

In Technocraft, we are constantly engaging in R&D activities to develop newer products, and use the most efficient and sustainable production processes.

One of our prime focus in the organization is to reduce our carbon foot print, and make our processes and products more and more sustainable. We have registered on the Higg platform, so that we may have a benchmark for ourselves, and design a suitable road map which will help us achieve our long term goal on sustainability. This has helped us to build a global recognition amongst the best of the retail brands around the world. We have developed a lot of sustainable products using special fibres, recycled fibres. Sustainability is gaining traction globally, and therefore is an important factor for future growth of the fabric business.

Demand and supply

There will always be a good demand for high quality knit fabric. Generally, in garments, the most crucial element is fabric, which accounts for anywhere between 50 to 70% of the cost of the garment. It is relatively quite easy to set up a garment factory, but to set up a fabric mill is extremely complex challenging and capital intensive. Therefore, garment makers will always be eager to tie up with a good fabric mill, to establish a long term fabric supply, as it is not easy to set up a mill.

China, which has been the leader in fabric manufacturing, is facing its own set of challenges, with increasing labour cost, stringent environmental regulations, human rights issues (which have recently led to the ban on Xinjiang cotton), etc. India enjoys a strategic advantage by being the largest cotton producer in the world, and is gifted with a population of 1.3 billion people. With these strengths, India is poised to be a global leader in the production of high quality fabric, and can possibly become a very dependable source to all global brands.

::TEXPROCIL::



FOCUS ON KNITTED FABRICS

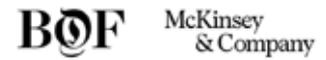
... A New Beginning !



**TRENDS
UPDATE**

The State of Fashion 2021
By BOF and McKinsey & Co.

The State of Fashion 2021



With the COVID-19 pandemic dominating thoughts and minds, fashion executives are planning for a range of scenarios and hoping for a speedy global recovery. However, amid increasing pressure on performance, shifting consumer behaviors, and accelerating demand for digital, there is an imperative to act decisively to prepare for the next normal.

After a year in which the fashion industry posted record-low economic profits, business leaders are on the front foot, seeking to innovate while continuing to engage their core constituencies. Given the disruptions of recent months, many companies are reconnecting with their supply chains, making tough decisions—for example, about ROI at store level—and ramping up omnichannel services. The coverage offered in the McKinsey & Company’s ‘The State of Fashion 2021’ report, shows that it has been challenging across the sectors to remain insulated from the pandemic, offering consumers a comforting pick-me-up in challenging times. As the world moves toward recovery, companies in the industry segment have a chance to align with shifting category and regional opportunities.

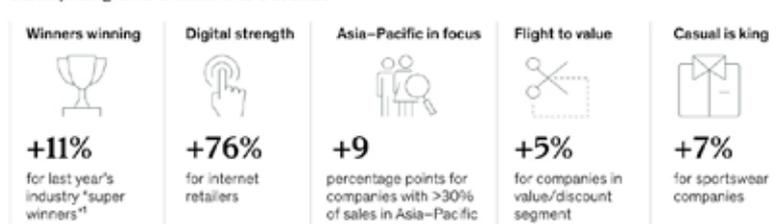
The State of Fashion 2021, is published in partnership with the Business of Fashion (BoF). The report, the fifth in the McKinsey annual series, drills down into the major themes affecting the fashion economy and assesses a range of possible responses. Reflecting the conversations with industry leaders over recent months, it examines the ten key trends likely to shape the business over the coming year.

Source: [McKinsey.com](https://www.mckinsey.com) | To view full report - [CLICK HERE](#)

Companies that have performed the best over recent months tended to share at least one of two key characteristics (See Exhibit 2). Many have had a strong Asia-Pacific focus, reflecting the economic strength of the region and the relatively lower impact of the pandemic there, and many have offered a compelling digital proposition. E-commerce players have consistently outperformed in 2020, as locked-down customers turned to digital devices to shop.

Well-performing fashion companies share at least one of two key characteristics: Digital strength and an Asia-Pacific focus.

Stock price growth Dec 2019 to Oct 2020



¹The 20 fashion companies by economic profit; references the 2018 list of super winners published in the previous edition of this report (based on 2018 full-year economic profit). Source: McKinsey Global Fashion Index

While the report highlights more such interesting facts, the ten key trends, likely to shape business in the coming years, can be glanced in the following pages. To view full report - [CLICK HERE](#)

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TRENDS UPDATE

The State of Fashion 2021
By BOF and McKinsey & Co.

GLOBAL ECONOMY

01.

Living with the Virus

The Covid-19 crisis has impacted the lives and livelihoods of millions of people, while disrupting international trade, travel, the economy and consumer behaviour. To continue to manage unprecedented levels of uncertainty in the year ahead, companies should rewire their operating models to enable flexibility and faster decision-making, and balance speed against discipline in the pursuit of innovation.

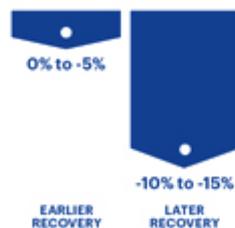


Covid-19 and the economic crisis is the top challenge for 2021 for 45% of fashion executives and stakeholders surveyed

02.

Diminished Demand

Following the deepest recession in decades, the global economy is expected to partially recover next year but economic growth will remain diminished relative to pre-pandemic levels. Since demand for fashion is also unlikely to bounce back due to restrained spending power amid unemployment and rising inequality, companies should seize new opportunities and double down on outperforming categories, channels and territories.



Global fashion sales in 2021 could be below 2019 levels by as much as 15 percent

CONSUMER SHIFTS

03.

Digital Sprint

Digital adoption has soared during the pandemic, with many brands finally going online and enthusiasts embracing digital innovations like livestreaming, customer service video chat and social shopping. As online penetration accelerates and shoppers demand ever-more sophisticated digital interactions, fashion players must optimise the online experience and channel mix while finding persuasive ways to integrate the human touch.



71% of fashion executives expect their online business to grow by 20% or more in 2021

04.

Seeking Justice

With garment workers, sales assistants and other lower-paid workers operating at the sharp end of the crisis, consumers have become more aware of the plight of vulnerable employees in the fashion value chain. As momentum for change builds alongside campaigns to end exploitation, consumers will expect companies to offer more dignity, security and justice to workers throughout the global industry.



55% of consumers expect fashion brands to care for the health of employees in times of crisis

05.

Travel Interrupted

The travel retail sector remains severely disrupted and destination shopping suffered throughout 2020. With international tourism expected to remain subdued next year and shoppers experiencing further interruptions to travel, companies will need to engage better with local consumers, make strategic investments in markets witnessing a stronger recovery and unlock new opportunities to keep customers shopping.



66% of fashion executives expect travel retail sales to recover their former growth levels only within 2 or 3 years



Avail of more detailed information on **SUSTAINABILITY @ TEXPROCIL**
Please Visit our website: www.texprocil.org
email: info@texprocil.org

**TRENDS
UPDATE**

**The State of Fashion 2021
By BOF and McKinsey & Co.**

FASHION SYSTEM

06.

Less is More

After demonstrating that more products and collections do not necessarily yield better financial results, Covid-19 highlighted the need for a shift in the profitability mindset. Companies need to reduce complexity and find ways to increase full-price sell-through to reduce inventory levels by taking a demand-focused approach to their assortment strategy, while boosting flexible in-season reactivity for both new products and replenishment.



58% of fashion executives consider **assortment planning** to be a key area for data and analytics in 2021

07.

Opportunistic Investment

Performance polarisation in the fashion industry accelerated during the pandemic as the gap widened between the best-performing companies and the rest. With some players already bankrupt and others kept afloat by government subsidies, we expect M&A activity to increase as companies manoeuvre to take market share, unlock new opportunities and expand capabilities.



45% of fashion executives expect **market share redistribution** to be a top theme in 2021

08.

Deeper Partnerships

By exposing the vulnerability of procurement partners, the weakness of contracts and the risks of a concentrated supplier footprint, the crisis accelerated many of the changes that companies were already making to rebalance their supply chain. To mitigate future ruptures, fashion players should move away from transactional relationships in favour of deeper partnerships that bring greater agility and accountability.



35% of fashion executives expect **resilience and partnerships in the supply chain** to be a top theme in 2021

09.

Retail ROI

Physical retail has been in a downward spiral for years and the number of permanent store closures will continue to rise in the post-pandemic period, compelling fashion players to rethink their retail footprints. Amplified by a potential power shift from landlords to retailers and the need to seamlessly embed digital, companies will need to make tough choices to improve ROI at store level.



Approximately half of European consumers have **shopped less in physical stores** since lockdowns started

10.

Work Revolution

Prompted by fundamental changes in the way companies worked during the pandemic and the need to drive performance in the years to come, an enduring new model for work is likely to emerge. Companies should therefore refine their blends of remote and on-premises work, invest in reskilling talent and instil a greater sense of shared purpose and belonging for employees who continue to reconsider their own priorities.



89% of fashion executives expect a **hybrid model of working** to be part of the new normal



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email: info@texprocil.org

DESIGN CORNER

KNITWEAR: Yarn and Colour Trends

By Zegna Baruffa



The Brave. © Zegna Baruffa

Zegna Baruffa Lane Borgosesia, an Italian leader in the production of fine yarns for top-quality knitwear, together with its Chiavazza and Botto Poala brands, presents latest yarn and colour trends.

The Brave

This range is dominated by the colour pink and what it represents. "Talking about shocking pink means telling the story of a truly daring woman, nicknamed "l'Imbroglia". Daisy Fellowes, daughter of an aristocrat and heiress of the Singer sewing machines, left her mark in the history of Parisian salons from the early 1900s for her eccentric and rebellious character," the company explains.

"It was a fashion show by the surrealist couturier Elsa Schiapparelli that marked the entrance of shocking into history: Daisy presented herself wearing a bright pink 18 carat diamond which had belonged to Russian nobility and purchased in the Cartier boutique. The stylist immediately fell in love with the stone which she defined as "brilliant, impossible and impudent" and chose the colour for the packaging of her first perfume: SHOCKING."

Super Natural

"Without melange shades, knitwear could never have been merged into collections and into the fashion it has represented ever since," the company continues.

"Journalists have always defined these colours in thousands of different ways, not considering what this range actually represents: the impressionist basis of collections."

Mood

This range depicts a universe in grey, many types of shaded blues, white and yellow lights, coloured lights, sudden flashes of every colour, multiplied by the reflection of infinite crystals.

It is inspired by the urban landscape, its most authentic and recognisable colours, its changing rhythm, the cultural scene and passing time.



Super Natural. © Zegna Baruffa

DESIGN CORNER

KNITWEAR: Yarn and Colour Trends

By Zegna Baruffa



Desire

“The city is the physical and mental place of our living. It is found in the uninterrupted pulsing of its streets, in the mystery of all the windows we look at losing ourselves in imagining other people’s lives, searching for happiness, melancholia, desire, the solitude of our existence,” the company explains.

“The city is a meeting place. But it is also the place where one can truly be alone, spectators by choice or for necessity of a macrocosm on the move, of a gigantic pantomime about the human condition, where each fleeting framing can be the emotion of just one instant.”

“Gold is the colour of desire. To those who consider red the colour of passion and of desire, we suggest contemplating the portrait of Adele Bloch-Bauer, painted by Klimt at the beginning of the last century,” the company continues. “In this range, gold has the same weight as the other shades and as such is used and rendered liveable even today.”

City

Beige can be found in the sand and in rocks, in interior design materials, in sculptures and on the Parthenon, and inspires this range. The term beige remains the same in all languages although inherited from French. Originally it was used to define a fabric obtained from unbleached wools and more than often the term was used to indicate the product itself.

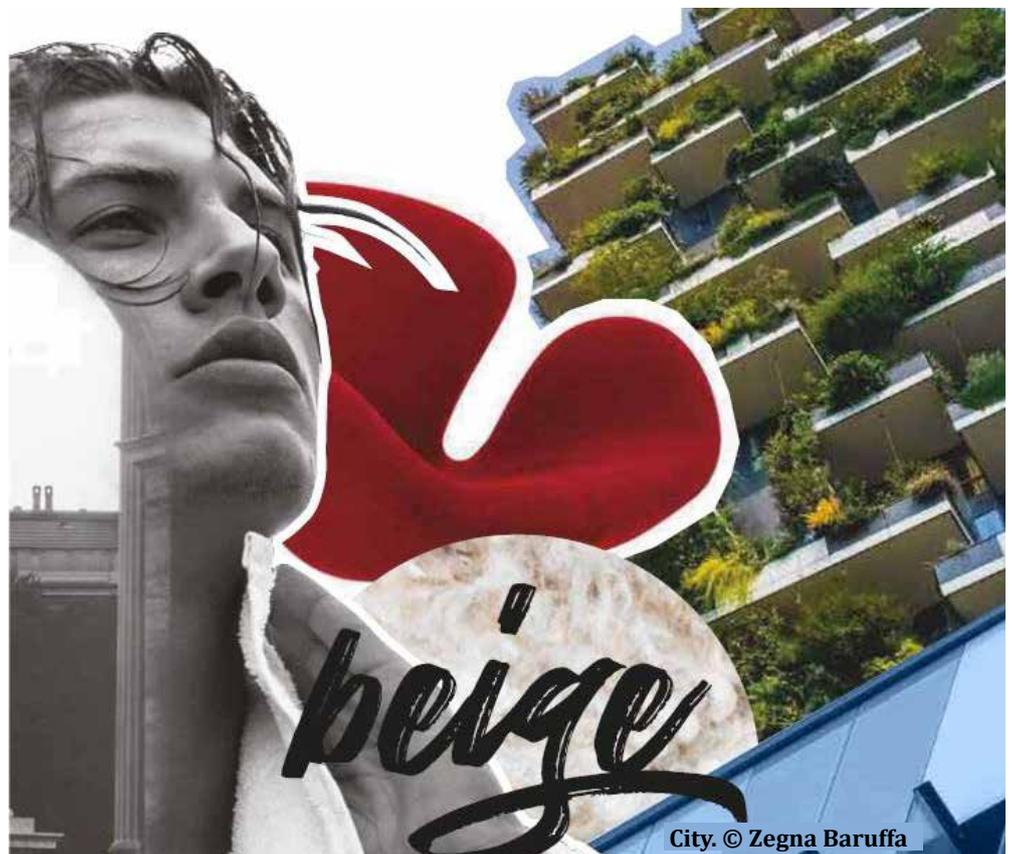
Today it represents a colour that is neutral and reassuring but which, with the passing of time, has taken on a character of itself, to be combined with bright colours but which gladly carries a style of its own.

Brocade

This range is driven by the colour Naples Yellow – one of the shades of gold most used in a rather complex family of colours. The term can be found for the first time in the 1700s, when an Italian baroque painter wrote lateolum Napolitanum in order to define a pigment of this colour. Its true story has, however, remained unknown up to now, adding to its charm. Its presence within this range, which would otherwise have been considered as too opaque and intensely wintry, gives warmth and brightness.

Source: www.baruffa.com

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TRADE NOTIFICATION

Important Circulars to Members

**E-Serve No.: 94 | Date: July 01, 2021
Circular No. EPS/40/2021-22**

**E-Serve No.: 97 | Date: July 15, 2021
To: Members of the Council**

Sub : Interest Equalization Scheme extended till 30.09.2021

Sub : ITMF - 9th Corona Survey.

Dear Member,

Dear Member,

RBI has extended the Interest Equalization scheme by three months from June 30, 2021 till September 30, 2021 vide Circular No. R.CRE(DIR).REC.28/04.02.001/2021-22 dated July 1, 2021, a copy of which is enclosed herewith. ([Click here](#))

The series of ITMF Corona-Surveys continues with its 9th edition. The survey is conducted with the help of Survey-Monkey. To complete the survey will take less than 3 minutes.

We request all our members to kindly participate in the survey by clicking on the link enclosed herewith ([Click here](#)).

You are requested to please take a note of the above and do the needful.

We request you to kindly complete the survey before July 21st. In case of any query, you may please contact:

Regards,

Dr. Olivier Zieschank, Director, ITMF
Email: olivier.zieschank@itmf.org

Please ignore this email if you have already completed the survey.

(Dr. Siddhartha Rajagopal)
Executive Director

Regards,

(Dr. Siddhartha Rajagopal)
Executive Director

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::TEXPROCIL::

**E-Serve No.: 100 | Date: July 16, 2021 | Circular No. EPS/42/2021-22
Sub : Suggestions on Foreign Trade Policy (2021-26)**

Dear Member,

As you are aware, the Foreign Trade Policy 2015-20 has been extended till 30th September 2021.

The Government is in the process of formulating the new Foreign Trade Policy 2021-26.

In this regard, DGFT has issued a Trade Notice No.09/2021-22 dated 16.07.2021 inviting suggestions on the new Foreign Trade Policy from exporters and all stakeholders.

A copy of the Trade Notice is enclosed herewith ([Click here](#)).

You are requested to please take a note of the above and send your suggestions to DGFT on or before 31.7.2021.

We would also request you to please send us your suggestions on the email IDs ravikumar@texprocil.org / vimal@texprocil.org so that we can send suitable recommendations to the Government.

Assuring you of our best services at all times.

Regards,

(Dr. Siddhartha Rajagopal)
Executive Director

::TEXPROCIL::

TEXPROCIL - The International face of Indian Cotton textiles !



TRADE NOTIFICATION

TEXPROCIL - The Facilitator ! (Promote Your Merchandise & Services)



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Website: www.texprocil.org



Advertisement Package for promoting products and solutions in the E-publications of TEXPROCIL

Dear Madam/Sir,

As a part of TEXPROCIL's knowledge sharing initiatives, the Council is coming up regularly with various E-publications. The circulation of these publications, averaging to over 3000 avid readers, includes the Council's strong database of 2,000 nos. membership comprising manufacturers, exporters, traders of Indian cotton fibre, yarn, fabrics and madeups range of products. The readership database also includes the contacts of textiles trade associations, government representatives, foreign missions, etc. which are being updated from time to time.

The Council has planned to offer an 'Advertisement Package' for the various E-publications with a view to enhance the exposure of products and solutions being offered by various entities. We request you to kindly consider the advertisement opportunity as per details attached.

E-publication details are as follows:

1. **E-Newsletter** - Published every fortnight - Launch of New Volume in the last fortnight of January 2021.

2. **IBTEX** - Published daily - Includes news clippings on articles of interest in T&C appearing in various publications.

Advertisement Package details are given below this column.

For further clarifications you may like to advise your office to kindly write to Mr. Rakesh Chinthali, IT Officer/ Mr. Rajesh Satam, Joint Director on email: rakesh@texprocil.org / rajesh@texprocil.org.

For queries related to booking your advertisement kindly write to Mrs. Mrunal Sawant on email: mrunal@texprocil.org.

We look forward to receiving your enquiries / confirmation for availing the advertisement opportunity in E-publications of TEXPROCIL.

Regards,

Dr. Siddhartha Rajagopal
Executive Director

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ADVERTISEMENT PACKAGE (For Advertisement in TEXPROCIL E-PUBLICATIONS)

TEXPROCIL E-NEWSLETTER (FORTNIGHTLY)

Ad. Option	One Issue	Six issues	Twelve Issues	Twenty Four Issues (BEST OFFER)
Double Spread	Rs. 12,000	Rs. 61,200	Rs. 1,15,200	Rs. 2,16,000
Quarter Page	Rs. 2,000	Rs. 10,200	Rs. 19,200	Rs. 36,000
Half Page	Rs. 3,000	Rs. 15,000	Rs. 28,500	Rs. 54,000
Full Page	Rs. 5,000	Rs. 25,500	Rs. 48,000	Rs. 90,000

IBTEX E-NEWS CLIPPINGS (DAILY)

Ad. Option	Three Months	Six Months	Twelve Months	Twenty Four Months (BEST OFFER)
Click-on-Logo	Rs. 15,000	Rs. 25,000	Rs. 50,000	Rs. 90,000

For more information
please contact:

Rajesh Satam,
Joint Director

The Cotton Textiles
Export Promotion
Council

5th floor,
Engineering Centre,
9, Mathew Road,
Mumbai - 400 004 India
T. 91-22- 2363 2910 to 12
F. 91-22-23632914

Email
rajesh@texprocil.org
Website
www.texprocil.org

TRADE NOTIFICATION

TEXPROCIL MEMBERSHIP SATISFACTION SURVEY

Dear Member,									
Kindly fill in your complete information below and respond to the questions below by tick (✓) marking appropriate response in the space provided or with suggestions in brief wherever necessary. We value your association with us and prompt feedback.									
COMPANY INFORMATION									
Name of the Company		:							
Contact Person & Designation		:							
TEXPROCIL Membership (RCMC) No.		:							
Email Address & Website		:							
1) Kindly rate the following services offered by Texprocil on rating of 1 to 5. in order to serve you still better.* 1= Excellent, 2=Good, 3 = Satisfactory, 4 = Needs Improvement, 5 = Not Availed (N.A.)									
Membership	Rate Here	Trade Development	Rate Here	Trade Promotion	Rate Here	Trade Services	Rate Here	Trade Intelligence	Rate Here
Procedure for New Membership	<input type="text"/>	Publication: E-Newsletter	<input type="text"/>	Intl. Fairs & Events	<input type="text"/>	Certificate of Origin	<input type="text"/>	Interactive Website	<input type="text"/>
Membership Renewal	<input type="text"/>	E-serve	<input type="text"/>	Seminars & Workshops	<input type="text"/>	Grievance Redressal Services	<input type="text"/>	E-News Clippings	<input type="text"/>
RCMC Amendment	<input type="text"/>	Circulation Trade Enquiries/ Award	<input type="text"/>	MDA/MAI Schemes	<input type="text"/>	Information on Exim policy/ Amendment DBK	<input type="text"/>	Information Disseminated	<input type="text"/>
2) a. Are you generally satisfied with the services actively availed by your company and marked above? Tick (✓)						YES	<input type="text"/>	NO	<input type="text"/>
b. If you have replied 'no' above, please suggest how the Council can improve the services (use additional sheet if required)						Suggestions:			
3) How is your company benefitting from the Exhibitions / BSMS being organized by the Council? Tick (✓)						Accessing new Markets	<input type="text"/>	Generating additional business	<input type="text"/>
Others (Pls. Specify):						Making new Contacts (Trade Enquiries)	<input type="text"/>	Any Others	<input type="text"/>
4) How is your company benefitting from the Export Facilitation services being provided by the Council?						Information on Export Policy / Procedures	<input type="text"/>	Responses to various EXIM queries	<input type="text"/>
Others (Pls. Specify):						Redressal of Trade related grievances	<input type="text"/>	Any Others	<input type="text"/>
5) Have you recommended TEXPROCIL Membership to other companies? Tick (✓)						YES	<input type="text"/>	NO	<input type="text"/>
6) Do you have any other suggestions to offer regarding TEXPROCIL Member Services? (use additional sheet if required)						Suggestions:			

*Kindly ignore this feedback form, if you have already responded.

**TRADE
NOTIFICATION****TEXPROCIL MEMBERSHIP
Annual Renewal Subscription**

The Annual Renewal Subscription for the financial year 2021-22 has become due for payment from 1st April 2021.

The Annual Renewal Subscription charges are as follows:

Type of Membership	Amount (Rs.)	GST @ 18%	Total Amount (Rs.)
Member (with Voting Right)	11000/-	1980/-	12980/-
Registered Textile Exporter	6000/-	1080/-	7080/-

We would request you to kindly renew your membership by sending us the Annual subscription for the year 2021-2022 by way of Multicity cheque or Demand Draft in favour of 'The Cotton Textiles Export Promotion Council' payable at Mumbai or by Neft Transfer as per below bank details:

Account Name	The Cotton Textiles Export Promotion Council
Bank	Axis Bank Ltd.
Branch	Charni Road Branch, Mumbai-400004
Account No.	920010074659407
IFSC Code	UTIB0002274

After transferring the payment, send the details of online payment along with a scanned copy of Bank Payment Advice by Email in the following format on: smita@texprocil.org

Company Name	
Registration No.	
GST No.	
UTR No.	
Date of Transaction	
Name of Bank	
Amount of Transfer	
WhatsApp No.	(To receive handy and timely information from TEXPROCIL)

Renewal of RCMC

On expiry of Registration-Cum-Membership Certificate (RCMC) on or before 31.03.2021, following steps to be followed: Upload self-attested scanned copies of the following documents online on TEXPROCIL's website (www.texprocil.org) through Member login and send a renewal request by Email on the Email ID smita@texprocil.org (In case the RCMC has expired) :

- [1] Copy of your Import-Exporter Code (IEC)
- [2] In case of Manufacturer Exporter, a copy of Manufacturing Licence (MSME/SIA)
- [3] In case of changes in Partners, a copy of revised deed of partnership
- [4] In case of changes in Directors, a copy of DIR-12 or Board Resolution for those who have resigned or newly appointed.
- [5] Copy of old RCMC
- [6] Copy of GST Registration Certificate (if not submitted earlier)
- [7] Payment advice of Annual Subscription for the year 2021-2022

Or

Alternatively, send self-attested scanned copies of the above documents by Email on: smita@texprocil.org

We solicit your support and co-operation in the matter and request you to please renew your membership with the Council at the earliest. This will also enable you to avail of uninterrupted benefits under the Foreign Trade Policy 2015-20 which has now been extended till September 30, 2021.

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