

**Threads of Transformation : Strategic insights for Global Apparel Leadership**



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**SUSTAINABLE  
DEVELOPMENT  
GOALS**







## FROM PRESIDENT'S DESK

**PMS Uppal**  
President, OGTC

I am delighted to present the next edition of our Newsletter to our members which recalls the activities and developments over the past six months. The year began with a committed thrust on production focused to meet our respective export commitments on time.

The overall outlook for Indian apparel exports is optimistic inspite of the challenges such as the need for infrastructure improvement and addressing compliance with international standards. The growing global demand for sustainable and ethically produced garments aligns with India's increasing focus on eco- friendly and socially responsible manufacturing practices. We, as members of OGTC, need to continue contributing our might in the surge to accelerate exports.

Our focus on training was on the back burner during the first quarter of the year but I hope our members will lay due emphasis and utilise the next quarter to upgrade their training activities. The upgraded contents of the Advanced training of Supervisors is a good platform and I would urge members to undertake this training for their Supervisors. With the growing call for gender parity, I also urge members to encourage women workers to take on higher responsibilities in the grade of Supervisors / Managers.

In our endeavour to reduce carbon footprint, OGTC facilitated detailed energy audits of member factories; this not only helped the users to identify the areas where they need to take corrective actions to conserve energy but also take preventive actions against fire accidents. I am very pleased that many members have participated in this drive, however, I urge other members also to review and get their factories audited on the energy front.

The programme on “**Leadership Role in Building Exemplary Organizational Culture**” by Mr. Aswatha Ramaiah was very fruitful and topical. Members may also like to evaluate further intervention by Mr. Ramaiah for their in-house training particularly of middle management.

Finally, I take this opportunity to share that our flagship event, **19th International Conference on Apparel & Home Textiles 2024**, will be held at AEPC, Gurugram on 14th September 2024. I appeal to all members to actively participate in the proceedings so that they can benefit from the richness of knowledge our speakers will share on topics of relevance.







**Sudhir Sekhri**  
Chairman, AEPC



(Sponsored by Govt. of India, Ministry of Textiles)

### MESSAGE

I am glad to learn that OGTC is bringing out the 41st Edition of their bi-annual newsletter and wish to congratulate them for the yeomen service rendered to promote the Apparel Industry. Though OGTC may have started off as an association of apparel manufacturer exporters of Okhla but over the years it has become known to be a Think Tank of forward-looking apparel manufacturers of the entire NCR.

It is today a unique association of like-minded apparel exporters who are open to share their knowledge and experiences in collaboration with each other, for the greater cause and for the betterment of the industry. I appreciate their focus on training both individually as well as collectively.

AEPC has been working closely with OGTC and spares no efforts to provide knowledge transfer and professional support to the cluster. The OGTC initiative of organizing International Conferences every year is highly appreciated by the apparel fraternity and AEPC is proud to be actively supporting this yearly flagship event of the Cluster.

The apparel industry, which is highly labour intensive, is being actively supported by the Government through apparel industry-friendly policy interventions from time to time at the behest of AEPC. Our Industry is going through difficult times because of external factors but there is a silver lining in the dark clouds. It is imperative that our Industry and the GOI collaborate with each other to harness the advantages that may flow from the China Plus strategy of the global players.

I once again wish the management of OGTC the very best and look forward to its continued close association with AEPC.







## Promoting Circularity and Sustainability in the Apparel Manufacturing Sector

**Col. S. Kapoor**  
Director General, OGTC

The apparel manufacturing sector, traditionally associated with high levels of waste and environmental degradation, is increasingly being called upon to adopt sustainable and circular practices. Circularity in this context refers to the design and production of clothing in a way that maximizes the lifecycle of materials and minimizes waste, whereas sustainability encompasses broader environmental and social dimensions. Achieving these goals requires a multi-faceted approach involving design innovation, material selection, manufacturing processes, and post-consumer strategies.

### Design for Longevity and Recycling

One of the foundational steps toward promoting circularity in apparel manufacturing is adopting design principles that extend the lifecycle of garments. This includes designing for durability, modularity, and ease of repair. Garments should be created with high-quality materials and construction methods that withstand wear and tear, reducing the frequency with which consumers need to replace items. Moreover, designers should consider the end-of-life phase of garments during the design process. This can involve using materials that are easier to recycle or designing clothes that can be easily disassembled. Brands like Patagonia and Eileen Fisher have pioneered this approach, offering take-back programs that recycle old garments into new products, thus closing the loop on their product lifecycle.

### Sustainable Material Choices

The selection of sustainable materials is crucial in reducing the environmental footprint of apparel manufacturing. Organic cotton, recycled polyester, and biodegradable fabrics are examples of materials that have a lower environmental impact compared to conventional cotton or synthetic fibers. Additionally, innovations in bio-fabrication, such as lab-grown leather and spider silk, offer promising alternatives that could revolutionize the material landscape in fashion. Sourcing materials locally or regionally can also reduce the carbon footprint associated with transportation. Furthermore, ensuring that materials are produced under fair labour conditions supports social sustainability, addressing ethical concerns in the supply chain.



### **Efficient Manufacturing Processes**

Improving the efficiency of manufacturing processes is another critical area for promoting sustainability. Adopting technologies such as 3D knitting and digital printing can significantly reduce material waste. These methods allow for precise control over material usage, ensuring that only the necessary amount of fabric is used for each garment. Implementing closed-loop water systems and using renewable energy sources in production facilities can further decrease the environmental impact. For instance, denim manufacturers like Levi's have developed waterless dyeing techniques and solar-powered factories to reduce their environmental footprint.

### **Embracing Ethical Labour Practices**

Sustainability in apparel manufacturing also extends to the ethical treatment of workers. Ensuring fair wages, safe working conditions, and the right to collective bargaining are essential components of a sustainable apparel industry. Brands can promote these practices by conducting regular audits of their supply chains and partnering with certified organizations such as Fair Trade.

### **Post-Consumer Strategies**

Effective post-consumer strategies are essential for maintaining circularity. Encouraging consumers to recycle or upcycle their old garments can significantly reduce waste. Brands can facilitate this by offering take-back schemes, repair services, or incentives for returning used clothes. The rise of second-hand marketplaces and clothing rental services also supports the extension of garment lifecycles.

Educational initiatives can play a significant role in changing consumer behaviour towards more sustainable practices. By raising awareness about the environmental and social impacts of fast fashion, brands can encourage more conscious purchasing decisions. In conclusion, promoting circularity and sustainability in the apparel manufacturing sector requires a holistic approach that encompasses design, material selection, manufacturing processes, ethical labour practices, and post-consumer strategies. By embracing these principles, the industry can significantly reduce its environmental footprint and contribute to a more sustainable future.



## **OGTC WELCOMES NEW MEMBER**



### **M/S GENERAL COMMERCE LTD**

**MR. ASHISH NATH**

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NEW DELHI-110001

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## OGTC ACTIVITIES

### SEMINAR ON GST & CUSTOMS

A special seminar on GST & Customs was held for our members at Faridabad on 13th January 2024. The seminar was conducted by team from **M/s Lakshmikumaran & Sridharan Attorneys**. The seminar which was attended by 45 participants was very informative and created the required awareness amongst the participants.



### WORKSHOP FOR OWNERS

A workshop on “Leadership Role in Building Exemplary Organizational Culture” was held for OGTC member Owners and Senior Management on 2nd February 2024.

The workshop was conducted by Mr. Aswatha Ramaiah, an acclaimed trainer.

The workshop was attended by 29 participants who were very appreciative of the content of the programme.



### OGTC DELEGATION AT BHARAT TEX-24

OGTC delegation led by Mr. PMS Uppal visited Bharat Tex-24 on 27th February 2024. The delegation visited a large number of stalls and appreciated the initiative of the Ministry of Textile, Govt. of India who in conjunction with Apparel Export Promotion Council across the country organized this mega event to show case the prowess of the Indian textile and apparel industry.

During the course of the exhibition, OGTC signed a MOU with M/s Reverse Resources, Bangalore in the presence of our members Mr. Animesh Saxena, M/s Neetee Apparel and Mr. Amit Agarwal, M/s Genus Apparels Ltd.

M/s Reverse Resources is providing a digital platform to promote proper disposal of waste fabrics and its traceability.





## DISPOSAL OF WASTE FABRICS

Sustainability continues to remain a focused goal for OGTC and its members. In this direction, OGTC facilitated a digital platform for disposal of waste fabrics created by M/s Reverse Resources. 12 members undertook the free trial provided by M/s Reverse Resources.

## ENERGY AUDIT

In our quest to reduce carbon footprint and promote energy conservation, OGTC undertook a special drive to facilitate conduct of detailed energy audit by professional Accredited Auditor. Till date 18 energy audits have been completed.

OGTC offered to defray 50% cost of the audit for one factory of each member company. It is hoped that the finding of the audits will help respective companies to take steps to further conserve energy and prevent accidents.



## MOU WITH M/S FASHION SNOOPS

Fashion Snoops is a US-based, AI-backed design & fashion trend forecasting agency. They had given a presentation of their platform which was attended by our members and the platform was found to be very useful and perhaps better than existing similar platforms.

OGTC and Fashion Snoops signed an MOU on 18th March 2024 wherein Fashion Snoops will provide their platform to OGTC members at highly subsidized rates.

## TEXTILE SOURCING MEET'24

OGTC collaborated with SOWTEX to organize the 9th Textile Sourcing Meet'24 on 10th and 11th April 2024 at Delhi. The event was aimed to facilitate fast track sourcing through physical and digital interactions.

Mr. Anil Peshawari, MD, M/s Meenu Creation LLP was the Guest of Honour on the occasion. After the inauguration, Mr. Anil Peshawari along with delegates from OGTC visited various stalls exhibiting their products.

This sourcing meet was also attended by concerned Sourcing teams from many member companies.





## 20<sup>TH</sup> OGTC FOUNDER'S DAY

OGTC celebrated its 20th Founder's Day with a gala dinner at Friends Club, New Delhi. The dinner attended by members and their spouses provided an excellent bonhomie and afforded the members and their spouses an opportunity to interact informally; each member company was presented an appropriate memento to commemorate the occasion.



## MOTIVATIONAL TRAINING PROGRAMME

A motivational training programme was conducted by Mr. Suresh Mohan Semwal of POSSIBLERS at Faridabad on 18<sup>th</sup> May 2024. The programme was attended by 45 participants from 9 member companies.

Mr. Suresh Mohan Semwal, who is an acclaimed Motivational speaker, enthused and motivated the participants with relevant anecdotes and content.



## NGRBC STAKEHOLDER'S MEET

OGTC was a member of the committee constituted by Indian Institute of Corporate Affairs at the behest of Ministry of Corporate Affairs for preparing a draft on "Adaptation of the National Guidelines on Responsible Business Conduct (NGRBC) in Indian Ready-made Garment Sector."

A stakeholder meeting with OGTC members was held on 6th June 2024 which was attended by Mr. Param Preet Singh – VP Operations, M/s Pee Empro Exports Pvt Ltd, Mr. Ankit Kaushik – GM-HR, M/s Paramount Products Pvt Ltd and Ms. Shubha Nivedita – Chief People Officer-HR, M/s Matrix Design & Industries Pvt Ltd.

The deliberations were meaningful and contributed to refinement in the draft guidelines.







## Energy Audit – OGTC Members

### **Dr. P.P. Mittal**

Accredited Energy Auditor

Director

**A-Z Energy Engineers Pvt. Ltd.**

Energy Audit is the key to a systematic approach for decision making in the area of energy management. It attempts to balance the total energy inputs with its use and servers to identify all the energy streams in a facility. It quantifies energy usage according to its discrete functions. Industrial energy audit is an effective tool in defining and pursuing comprehensive energy management programme.

In any industry, the three top operating expenses are often found to be energy (both electrical and thermal), labour and material. The Energy Audit gives a positive orientation to the energy cost reduction, preventive maintenance and quality control programme which are vital for production and utility activities. Such an audit programme helps to keep focus on variation which occur in the energy cost, availability and reliability of supply of energy as well as identify energy conservation. Energy Audit is the translation of conservation ideas into realities. The primary objective of Energy Audit is to determine ways to reduce energy consumption thus lower operating cost.

In the modern world, energy has become the basis of human life. Practically, all activities today revolve around either the transfer or transformation of energy. As a result, the rate of consumption of energy has increased manifolds and thereby become a grave concern. The rapid depletion of natural resources makes a compelling case for the judicious use of energy.

It is a common knowledge that environment and energy are inter-related. The increasing use of energy resource is one of the main cause of negative impact on the environment.

In order to promote energy audit, OGTC collaborated with us for conducting the energy audits for their member industry in February 2024; since then, we have audited 18 industrial apparel units spread over NCR as under:-

1. M/s Afflatus International, Plot No. 10, Sector 8, IMT Manesar
2. M/s Afflatus International, Plot No. 16, Sector-6, IMT Manesar
3. M/s Fine Lines, A-13, Sector-65, Noida
4. M/s Genus Apparels Ltd., 14/4/, Singhanian Chowk, Sher Shah Suri Marg, Faridabad
5. M/s Gudi Exports Pvt. Ltd., Plot No.60, Sector-27C, Faridabad
6. M/s Indigo Apparel Fabricators, Plot No. 106, Sector-6, Faridabad
7. M/s Indigo Crafts Pvt Ltd, 742 J, Pace City, Gurugram
8. M/s Meenu Creation LLP, A-33, Sector-64, Noida
9. M/s Neetee Apparel LLP, Plot No. 218, Udyog Vihar, Phase I, Gurugram
10. M/s Orient Fashion Exports (India) Ltd, A 1-4, Sector- 7, Noida
11. M/s Orient Fashion Exports (India) Ltd., 488-489, Phase III, Gurugram
12. M/s Orient Fashion Exports (India) Ltd., B-1, Sector-67, Noida
13. M/s Orient Fashion Exports (India) Ltd., B-4, Sector- 67, Noida
14. M/s Orient Fashion Exports (India) Pvt. Ltd., C-17, Sector 67, Noida
15. Pee Empro Exports Pvt. Ltd., Sector 27A, Faridabad
16. M/s Pooja International, Plot No. A-20, Sector -64, Noida
17. M/s Radnik Exports Global Pvt Ltd, Plot No 186, Phase I, Gurugram
18. M/s Saivana Garments Pvt. Ltd., Plot No. 166, DLF Industrial Area, Phase-I, Faridabad

After concluding each audit, we not only shared our report through a presentation to the management team but also advised on measures to be undertaken for energy conservation.



# Advance Supervisor Development Program

**methods**  
measure | manage | maximize

Elevating Leadership in the Garment Industry  
By M/s Methods Apparel Consultancy for OGTC Members



## Introduction

In the dynamic and fast-paced environment of the garment industry, effective leadership is essential for maintaining productivity, Reducing the setting time losses, Improving the learning curve, ensuring Quality, and fostering a positive workplace culture. The Advance Supervisor Development Program (ASDP) aims to equip supervisors with the necessary skills and knowledge to excel in their roles. This article outlines the key components and benefits, of an ASDP which is **tailored for the sewing product industry**.

## Key Components of the Advance Supervisor Development Program

### 1. Leadership Training:

- The cornerstone of any ASDP is robust leadership training. This includes modules on effective communication, conflict resolution, decision-making, and team management. Supervisors learn how to inspire and motivate their teams, delegate tasks efficiently, setting up their Goals and handle workplace conflicts with professionalism and empathy.

### 2. Technical Skills Enhancement:

- Supervisors in the garment industry must possess a strong technical understanding of production processes, machinery, Seams, Stitches and quality control. The ASDP includes hands-on training sessions to enhance their technical expertise, ensuring they can troubleshoot issues and provide guidance to their teams effectively, by reading the tech packs and measurement sheet by themselves.

### 3. QCO – Quick Change Over:

- In the garment industry, where rapid production and adaptability are crucial, optimizing processes is essential. Quick changeover, or SMED (Single-Minute Exchange of Die), is a lean manufacturing technique aimed at reducing the time required to switch production from one garment style to another. Implementing quick changeover team can significantly enhance efficiency, minimize downtime, and boost overall productivity.

### 4. Soft Skills Development:

- Supervisors must possess strong interpersonal skills to manage diverse teams effectively. The ASDP focuses on developing emotional intelligence, active listening, and empathy. These soft skills are crucial for building strong relationships with team members and fostering a collaborative and inclusive work environment.

## Benefits of the Advance Supervisor Development Program

### 1. Improved Leadership Quality:

- By providing supervisors with the tools and knowledge they need to lead effectively, the ASDP enhances the overall quality of leadership within the organization. Well-trained supervisors can better manage their teams, leading to increased productivity and morale.

### 2. Enhanced Productivity:

- Supervisors equipped with technical skills and performance management techniques can optimize production processes and ensure efficient workflow. This results in higher productivity and reduced downtime, directly impacting the company's bottom line.



### 3. Better Quality Control:

- With enhanced technical knowledge and attention to detail, supervisors can maintain high-quality standards throughout the production process. This reduces the risk of defects and returns, ensuring customer satisfaction.

### 4. Quick Change Over:

- **Increased Productivity:** Reducing changeover time allows for more production within the same timeframe, leading to higher output and efficiency.
- **Improved Flexibility:** Quick changeover enables manufacturers to respond swiftly to market trends and customer demands, essential in the fast-paced fashion industry.
- **Enhanced Quality:** Streamlining changeover procedures reduces the risk of errors and defects, ensuring consistent product quality within a day.

### 5. Increased Employee Retention:

- A supportive and well-managed work environment leads to higher employee satisfaction and retention rates. Supervisors who are skilled in conflict resolution and team management can create a positive workplace culture that encourages loyalty and reduces turnover.

## Conclusion

The Advance Supervisor Development Program is a strategic investment in the future success of the garment industry. By empowering supervisors with the skills and knowledge they need to lead effectively, companies can enhance productivity, reduce the changeover losses, ensure quality, and create a positive work environment. Implementing a comprehensive ASDP tailored to the unique needs of the garment industry is crucial for fostering strong leadership and achieving long-term business goals. Currently the training is in progress with M/s Orient Fashion Exports India Pvt Ltd.





## GLIMPSES OF CSR ACTIVITIES OF OGTC MEMBER COMPANIES (JANUARY TO JUNE 24)

### WOMEN AWARENESS PROGRAM BY POLICE DEPARTMENT AT M/S POOJA INTERNATIONAL



### HEALTH AND EYE CHECKUP CAMP AT M/S ORIENT FASHION EXPORTS INDIA PVT LTD



### NATIONAL GIRL CHILD DAY CELEBRATION AT M/S PARAMOUNT PRODUCTS PVT LTD



### INTERNATIONAL WOMEN'S DAY CELEBRATION AT M/S PARAMOUNT PRODUCTS PVT LTD





## CANCER AWARENESS AND HEALTH CHECK UP AT M/S RADNIK EXPORTS GLOBAL PVT LTD



## ACTIVITY ON EARTH DAY AND FUN ACTIVITY AT M/S RADNIK EXPORTS GLOBAL PVT LTD



## INSTALLATION OF SANITARY PAD VENDING MACHINE, INTERNATIONAL WOMEN'S DAY AND WORLD EARTH DAY CELEBRATION AT M/S PEE EMPRO EXPORTS PVT LTD



## COMMENDATION PROGRAMME AT M/S FANCY FASHIONS





## HR BEST PRACTICES IN OGTC MEMBER COMAPANIES

### **M/S GUDIEXPORTS PVT LTD, FARIDABAD**

- Initiative of organising sessions of small groups of 10-15 personnel to highlight the benefit of ESIC; success stories were also shared in the session which gave a positive feedback and resulted in members to come forward and enrol their families on the portal.

### **M/S ORIENT FASHION EXPORTS INDIA PVT LTD, NOIDA**

- Payslips are being sent to all employees on their respective email id's.
- SL & CL are being permitted to be carried forward till June of the following year to promote reduction in absenteeism.
- Award the best employee(s) every month based on efficiency, good attendance and less DHU% level.
- Mera Doc online tele platform for 24\*7 consultation with doctor for all employees.

### **M/S NEETEE APPAREL LLP, GURUGRAM**

- How to retain their employees in the organisation.
- Identifying issues related to PF & ESIC and resolve them to the satisfaction of their employees.

### **M/S FIORI CREATIONS PVT LTD, FARIDABAD**

Initiative on Labour Welfare Fund. Creating awareness amongst their employees on various schemes and also facilitating the claims to entitled personnel.

### **M/S RADNIK EXPORTS GLOBAL PVT LTD, GURUGRAM**

- "Thought of the Day" displayed at the reception area on daily basis.
- Organise Health & Dental Checkup Camp once a year.
- Award of Best Employee(s) from the Workers and Staff.
- Organise Yoga sessions and fun day activity on every Saturday for employees.

### **M/S RADNIK EXPORTS GLOBAL PVT LTD, NOIDA**

- Under RISE programme they have many CSR initiatives to include Mid-day meals, Health Checkup Camps, Skill upcycling, free education & dresses provided for needy children etc.
- Engaging 45% female workers in their organisation in different departments.
- Award of Best Employee(s) from the Workers and Staff.
- 3% Divyang and 11% LGBTQIA<sup>+</sup> people employed in their organisation.

### **M/S PEE EMPRO EXPORTS PVT LTD, FARIDABAD**

- Distribution of free sanitary pads to female employees.
- Employee of the month award based on targets achieved.
- Employed Divyang persons in the production line.
- Stress on water conservation.

### **M/S FANCY FASHIONS, NOIDA**

- Best Employee awards
- Awareness about achieving less absenteeism in the organisation.
- Improvement in Manufacturing Excellence through internal trainings from time to time.

### **M/S MATRIX DESIGN & INDUSTRIES PVT LTD, GURUGRAM**

- Structured induction of new joiners.
- Growth opportunities for internal candidates with good skill set.
- Reward & Recognition of best employee.
- Organise annual dinner for employees.



## CRAFTING BRAND INDIA: STRATEGIES FOR GLOBAL PROMOTION IN GARMENT MANUFACTURING

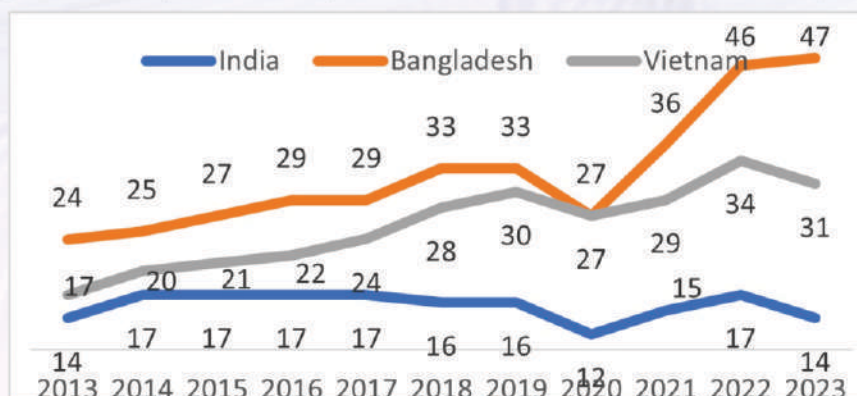
By Mr. Varun Vaid, Business Director, M/s Wazir Advisors

Apparel manufacturing is an important industry because it not only caters to one of the basic necessities of life but also provides employment to the lesser-educated and economically weaker sections of society. Additionally, it is a significant potential foreign exchange earner for the country.

The global exports of apparel in 2023 are estimated to be USD 501 billion, growing at a CAGR of approximately 3% over the last decade. An important shift observed in global apparel trade is China's decreasing market share due to several factors, including increased manufacturing costs, a focus on the domestic market and other high value-add sectors, and buyers' intent to diversify to avoid the impact of any trade conflicts between China and the West.

India seems best suited to benefit from such trade shifts due to its raw material availability, large workforce, supportive government policies, and comprehensive value chain. However, over the past decade, Indian apparel exports have stagnated, while several smaller garment-exporting nations have successfully increased their global market share (see figure below). This outcome appears counterintuitive yet it is the current reality.

Figure : Apparel Exports Trend of India, Bangladesh and Vietnam in the Last Decade (US\$ bn.)



One of the main reasons for this underperformance appears to be the buyers' perception of India as a sourcing destination, which is often justified. Buyers overlook India for several categories, primarily recognizing it for cotton-based fashion garments with smaller minimum order quantities (MOQs). Categories like sportswear, lingerie, or outerwear rarely include India in their consideration. As mentioned earlier, much of this oversight is justified by their previous experiences.

Achieving the government's export target of USD 100 billion by 2030, up from the current level of less than USD 15 billion, requires a significant shift in perception. India must be considered for a broader range of garment categories beyond the traditional ones. This necessitates a robust Brand India strategy. This is where Brand India becomes critical.





- Prioritize categories and markets where India is strong to identify new opportunities

Categories where India is strong Identify new markets for such categories

Countries where India is strong Identify new categories for such countries

This can be done through a detailed mapping of India's historical trade performance and benchmarking it on specific KPIs.

- Beyond leveraging existing strengths, it will also be important to understand how trade will shape up in the future. Will recycled products hold the key to the future? Will the demand for functional wear explode? Will EU's regional demand grow faster than others? And so on.

Getting a sense of future direction is critical to understanding which way the industry's efforts should be steered. For this, comprehensive market research would be required, interacting with value chain stakeholders, especially buyers and innovators.

The output of this step would be a country-level mapping of categories, buyers, applicable rules and regulations, tariff and non-tariff barriers to trade, platforms for engagement, emerging requirements, distribution channels, etc.

The next step would be to devise an actionable strategy that aims to:

- Address inherent challenges:
- Investing in design innovation and technology can enhance the global appeal of Indian garments. By incorporating modern design elements and leveraging new age technologies like digital textile printing, Indian manufacturers can create contemporary and trendy designs that appeal to a global audience.
- Fostering collaborations and partnerships with international brands and designers can help promote Brand India globally. By collaborating with renowned designers and brands, Indian manufacturers can showcase their capabilities and reach a wider audience through global retail channels.
- Focusing on quality control and product consistency is essential to build trust and credibility among global consumers. Indian manufacturers should adhere to international quality standards and certifications to ensure that their products meet the expectations of global consumers.
- Leveraging India's diverse and sustainable textile practices can be a key differentiator. With a growing global focus on sustainability, Indian manufacturers can focus on use of eco-friendly materials and traditional textile techniques that have minimal environmental impact. This can attract environmentally conscious consumers who are seeking ethically produced garments.
- Enhance global visibility: This should essentially include targeted buyer-specific activities along with participating in identified trade shows and exhibitions, organizing fashion shows and events, and leveraging digital marketing platforms to reach a global audience. This could be a multi-year plan with expense that co-relates with the budget availability.

Finally, a central agency should implement such a plan for the entire apparel industry.

At the moment, such structured strategy is absent. While several investment and export promotion agencies are making efforts in their own ways, what is missing is a coordinated and focused approach that could be more valuable. Industry stakeholders should approach policymakers to undertake this exercise and implement a cohesive Brand India campaign.

In conclusion, promoting Brand India globally in the apparel sector requires a strategic approach that leverages the country's rich heritage, sustainable practices, design innovation, and collaborations with international partners. However, all marketing efforts must be supported by steps to enhance inherent competitiveness as well.







## Can India achieve US\$ 40 Bn apparel exports by 2030?

**Dr. Rajesh Bheda**  
Managing Director  
Rajesh Bheda Consulting

Bharat Tex, India's largest textile event held in national capital in February 2024, succeeded in bringing together global textile leaders to the country. The Mega show generated keen interest from the international investors and would certainly help in boosting investments in the sector. It was an extraordinary effort to showcase the unique strengths of the textile ecosystem of India. In the context, it would be good to evaluate the future of apparel exports from India.

The Ministry of Textile has set the export target of US\$ 40 Bn for Indian apparel exports. When we look at the Indian textile value chain and strength of the country in terms of raw material availability across the fibre types, rich history of textile, education in textiles and clothing technology, availability of design talent and relatively competitive wage rates, it would be said that India has tremendous potential to increase its market share in International apparel trade. However, when we look at the export performance, it is a different story.

It must also be noted that in spite of enormous improvement potential, the Indian garment exports have been hovering at around 16-17 Billion dollars for last five years. Post Covid 19, the industry has not been able to bounce back, as geopolitical developments have affected the global consumptions and international trade. The market outlook in immediate future looks sombre. In spite of tough economic conditions and lower global demand, the garment industry in Bangladesh and Vietnam has done well compared to India as can be seen in table provided below.

Country wise Export Values (Bn. Dollars)					
	2018	2019	2020	2021	2022
India	16.5	17.2	13	16.2	17.7
Bangladesh	32.5	33.6	28.1	35.8	45.3
Vietnam	31.5	30.6	28.6	31.2	35.3
China	157.8	151	141.6	176.1	182.4

Source: WTO

Looking at the export performance of past 7 years, US\$ 40 Billion export target looks tough to achieve as it would require 15-16% year on year growth in exports, which we have not experienced for over a decade except post Covid recovery year.

This would also mean availability and consumption of additional 150% fabrics and other raw material accessories compared to the current level. The question remains are we ready for that level of growth in raw material production or imports?



This would also mean doubling the installed production capacity for garment manufacturing. The question remains, can we foresee that level of growth in production capacity? The FDI interests by international players and Indian manufacturing groups are a welcome sign, however, we need great momentum to create additional capacity across the country in the important manufacturing clusters.

To be able to capture the additional orders from existing customers and to gain new customers and new markets, we need to improve our competitiveness significantly. This is of immense importance as several other countries are aggressively pursuing these markets and succeeding as shown by the export performance of Bangladesh and Vietnam. Recent export data of China also shows resurgence in exports. For improving India's cost competitiveness, while reduction in cost of doing business is important, there is great scope to improve productivity as I have always emphasised. The average efficiency level in the Indian apparel manufacturing is estimated at 45-50% compared to 60-65% of China and Vietnam.

The industry needs to aim at improving productivity by 30% in coming 3-4 years, which is a challenging target at industrywide level but if implemented with full force and synergy, it is an achievable target.

The consulting experience of Rajesh Bheda Consulting at individual factory, cluster and country levels has shown remarkable productivity improvements. Such strategy can improve the cost competitiveness of the industry significantly and would help capturing new markets. This would also mean the Govt. needs to support the factories in implementing international best practices in management through availing of consulting advise for manufacturing excellence.

We will also need to prepare the workforce both at worker and managerial level to support performance at a world class level. Currently the industry faces skills shortage and existing skilling approaches fall short of industry expectations.. You can't fight modern day battle with Bow and Arrow soldiers.

Next area to look at is improving the capabilities to process MMF and speciality fabrics. Strengthening clusters like Surat to improve infrastructure and adopt ESG standards can help significantly. This can help us widen our product basket and capture greater share on autumn winter orders. This can solve the problems associated with seasonality in our industry.

It is also vital to conclude FTAs with key markets to address the disadvantage faced by the Indian exports compared to its competitors.

The industry will also need to make strides on ESG front. While India has several global leaders who are recognised for adopting best practices in sustainability and circularity, industry wide ESG adoption needs a lot of effort. I am happy to see that the Ministry of Textiles is giving a lot of emphasis to this area. We will also need to improve our communication and engagement with international stakeholders about the progress made by the industry in this area.

Next area to address is leadership development. The industry is yearning for young leaders who can bring youthful energy and modern outlook to address the challenges of today and the future. Barring exceptions, the third generation entrepreneurs are looking at other sectors to diversify the business and improve profitability.

To conclude, I would say "India is blessed with abundant raw material availability across almost all fibres, technological know-how and rich history of textile manufacturing and availability of human resource. However, our performance in the international market is not commensurate with our potential.

Achieving US\$ 40 B exports target is not going be an easy target, but, if the industry, government and all other stakeholders work together to address some of the questions highlighted above 'Impossible is Nothing'!





## Bangladesh Garment Industry (BGI) : Our Key Observations & Analysis

**Sunaina Khanna**

Director,  
M/s Methods Apparel Consultancy India Pvt Ltd

### Bangladesh Garment Industry (BGI) : Our Key Observations & Analysis

Garment Manufacturing has been key to the economy of the Indian Subcontinent. One country that has grown exponentially in the last one decade and has positioned itself as the Apparel Export Hub, is none other than **Bangladesh**.

We have been expanding our operations and services in Bangladesh and frequently visit the country, where the Ready Made Garment industry accounts for more than 84% of the country's exports earnings.

In this article, we will share our key observations on the Bangladesh Garment Industry, our major learnings and the key challenges surrounding the RMG sector in the country. I have always believed that **Manufacturing is a Cultural Phenomenon**, which one cannot master over a month or a year, and Bangladesh is a living testament of the same. Like **China and Japan have a knack for Electronics and Automobile** respectively, one can stretch this correlation to Bangladesh as well, for garment manufacturing.

Unlike India, which by large is a service sector driven economy, one can clearly notice that manufacturing is an integral part of Bangladesh. The participation of the workforce in the manufacturing process, especially the women, is just phenomenal. One may also relate this participation to the **low absenteeism** and low migration that Bangladesh has, when compared to India. Talking about the Employee retention, we found that employee retention is better in Bangladesh than here in India as well.

Another important thing we noticed is the capacity of production. The scale of production that Bangladesh has is huge, way ahead to that of India, which has two core benefits. Firstly, the **huge capacity invites high volume orders** from top brands. Secondly, by virtue of the big scale, the efficiency and productivity are comparatively much better.

Despite the recent **wage hike by 40%-45%**, Bangladesh still holds a competitive advantage. The export of the country has benefited immensely from the **FTAs** (Free Trade Agreements). Bangladesh also shares the status of the '**Least Developed Country**', a United Nations classification that exempts the poorest nations from tariffs on exports to developed countries.



Having mentioned the competitive cost advantage Bangladesh has for the Buyers, one needs to also analyse the difference in margin, the wage hike has created for the Bangladesh Manufacturers. The **demand for higher efficiency, better productivity has been at an all time high**, because the manufacturers need to manage the extra cost of the labour with better and efficient manufacturing. Hence, **Digital Transformation and Automation** is in great demand in Bangladesh today.

This has also raised the demand for **skill enhancement and training** of the workforce, which the BGI is highly focusing on. Further, the brands have been reluctant on **sustainability and transparency measures**, in a way forcing the Manufacturers to shift to a more organised manufacturing ecosystem.

The challenges are also going to be different once Bangladesh completes the transition out of 'Least Developed Country' status. Associations, especially the **BGMEA** (Bangladesh Garment Manufacturers and Exporters Association) are actively focusing on bringing out the sustainability measures of the BGI, in order to align with the Brand Standards and further attempting to diversify the industry.

However, the fact that around **75% of the BGI is still not very well versed with the concept of Digital Transformation, Manufacturing Excellence** is going to be challenging in the times ahead. Further, the willingness of this proportion (75% of the BGI) to invest and encompass the sustainability and automation measures is going to hold the key to the future of the Bangladesh Garment Industry.

To conclude, I would like to highlight the Japanese philosophy of **Kaizen**. On a similar trajectory as the Bangladesh Garment Industry, which is showing great optimism towards Digital transformation & Manufacturing Excellence, the Indian Garment Industry should also imbibe continuous improvement as its core philosophy and **invest in Manufacturing Excellence solutions**.

Upskilling, Automation, Training, Transparency in the value chain and encompassing Sustainability measures holds the key to the success of **the Garment Industry and the Indian Garment Industry should bring this culture in its ecosystem**. Training is another important parameter, which needs wider acceptability in the industry, across the hierarchy. We as an industry would definitely benefit from the aforementioned actionables, if implemented at a larger scale.







## BUSINESS ACUMEN AND PARTNERING

**Shubha Nivedita**

Head HR

M/s Matrix Design & Industries Private Limited

### **'Vigilant monitoring of industry and market trends crucial'**

In an era of unprecedented change and evolving business landscapes, HR professionals are pivotal strategic partners, contributing significantly to organizational success. Central to this contribution are two key pillars of upskilling: Business acumen and partnering.

### **Focus on timely and strategic adjustments**

In navigating the ever-evolving landscape of our industry, we prioritize continuous environmental scanning to remain **agile and relevant**. This involves vigilant monitoring of industry and market trends, and actively seeking insights from conferences and workshops to stay abreast of emerging HR practices. Every three years we conduct thorough HR strategy bench marking while fostering robust networks with industry associations for invaluable best practice sharing.

Our talent acquisition process is fortified to ensure strength and adaptability, monitoring attrition, and harnessing data analytics for strategic adjustments. Our HR initiatives consistently align with overarching business objectives by fostering cross-functional collaboration through open communication channels. Emphasis on proactive training and development programs enables us to anticipate and meet industry demands effectively. Ethical leadership is embedded within our culture, guiding decision-making processes, while a feedback-driven environment promotes continuous improvement and innovation across our HR function.

### **HR leaders must grasp customer behavior**

Consider the pivotal role aromas play in our perception of food. If utilized well in HR, this concept can do wonders as understanding customer needs is essential for HR leaders in shaping SME products or services. Before customers engage with a product or service, HR leaders must grasp their preferences and behaviors. This understanding acts as the olfactory trigger, guiding HR strategies to create offerings that resonate with customers, sparking interest and satisfaction. Aligning products with customer expectations enhances the overall experience, fostering loyalty and positive reception akin to the delightful anticipation evoked by the aroma of a well-prepared meal.

Future-focused HR professionals must also actively work towards maintaining a balance between individual/team goals and overall organizational objectives. A few steps that can help with create this much-needed alignment are:

1. Clearly communicating strategic objectives
2. Fostering a culture of open dialogue and collaboration
3. Regular performance reviews, feedback mechanisms, and agile adjustments to goals



## Maximizing collective capabilities

Encouraging collaboration among diverse teams within fast-growing organizations parallels orchestrating a symphony, where various instruments harmonize for a beautiful melody. Similarly, diverse teams seamlessly collaborate, leveraging their strengths for organizational success. This collaboration cultivates cross-functional synergy, amalgamating strengths across teams for holistic success. It also sparks innovation through diverse perspectives, fostering creative solutions at the intersection of varied team experiences. Collaborative efforts streamline processes, enhancing efficiency by minimizing duplication and maximizing collective capabilities. Such an environment boosts employee engagement, fostering a sense of belonging and active contribution. Moreover, collaborative teams exhibit greater adaptability to change, navigating dynamic business landscapes more effectively. HR professionals can foster this collaboration through interdepartmental workshops, knowledge-sharing platforms, and acknowledging cross-functional achievements.

## Strategies to skill HR professionals effectively

- Adoption of GPS approach – regularly recalibrate and stay updated.
- Establish continuous feedback forums, conduct regular skills assessments, and embrace agile learning initiatives.
- Just as tech giants invest in constant employee development, SMEs can adopt similar strategies. Google, for instance, encourages a "20% time" policy, allowing employees to dedicate a portion of their workweek to upskilling. This fosters a culture of continuous learning, ensuring HR professionals stay attuned to evolving expectations and responsibilities, steering their professional development in the right direction.

## HR Way forward

HR leaders need to immediately

### Start

- Harnessing the power of data to make informed decisions and focusing on employee wellbeing and DEI/IED initiatives

### Stop

- Overlooking employee feedback and judging everyone through the same lens

### Continue

- Best practices established in the company, training and development and R&R programs

## 3 keys to success

- One key SKILL HR leaders must possess

### Strategic thinking

- One key ADVICE to HR professionals to future-proof their career

**Prioritize continuous learning** to stay abreast with industry changes and focus on acquiring new skills

- One key STRATEGY that can help align individual and organizational goals

### Clear communication







## NEED OF KAIZEN IN GARMENT INDUSTRY

**Nagendra Chauhan**  
M/s Meenu Creations LLP

### WHAT IS KAIZEN?

Kaizen is a strategy where employees at all levels of a company work together proactively to achieve regular, incremental improvements to the manufacturing process. In a sense, it combines the collective talents within a company to create a powerful engine for improvement. Kaizen is also referred to as Continuous Improvement.

Create a culture of continuous improvement where all employees are actively engaged in improving the company. Nurture this culture by organizing events focused on improving specific areas of the company.

### KAIZEN EVENTS

A typical Kaizen event has a process that goes something like this:

1. Set goals and provide any necessary background.
2. Review the current state and develop a plan for improvements.
3. Implement improvements.
4. Review and fix what doesn't work.
5. Report results and determine any follow-up items.

### SHARING COST SAVING KAIZEN

In Our garment industry on stitching floor currently 12 -14 minutes are lost daily by every tailor while working in a complete shift.

Reason: - During Bobbin Winding

### LOST TIME (IN MINUTES AND RUPEES)

- Suppose a factory has 1000 (SNLS & DNLS) average operators per day.
- Every tailor wastes average 12 minutes per day (example: bottom fold operation)
- $1000 \times 12 = 12000$  minutes are lost / day
- Per minute cost is 1.09 rupees (on 13700 INR salary)
- Total wastage is around  $1.09 \times 12000 = 13,080$  INR / day.
- In month wastage will be  $13080 \times 26 = 3,40,080$  rupees

### NOW OUR SUGGESTION/ IDEA

- Suppose we give a separate bobbin to each machine then we can easily save this loss

One bobbin costs around 30 INR (best quality) if we give 1000 bobbins extra on running 1000 machines (SNLS & DNLS) it will cost around 30000 (complete month) against the loss of 3,40,080 rupees (complete month)

### Tangible benefit: -

- Cost saving of 3,10,080 rupees (monthly)

### Intangible benefit: -

- Garment productivity will improve

**Competition is tough in the market; we need to think & work like this to increase saving. This is only possible when we find out the small –small areas where we are wasting the time.**

There are many more KAIZENS which we do in our company on regular basis, you may check them on [my Linkedin id along with videos \(ID Name: - Nagendra Chauhan\)](#)





## CONFERENCE ANNOUNCEMENT ICAHT-2024

**19<sup>TH</sup> INTERNATIONAL CONFERENCE ON APPAREL & HOME TEXTILES  
ON 14<sup>TH</sup> SEPTEMBER 2024 AT AEPC, GURUGRAM  
THEME: THREADS OF TRANSFORMATION: STRATEGIC INSIGHTS FOR  
GLOBAL APPAREL LEADERSHIP**

### A BRIEF INTRODUCTION ABOUT OGTC

Established in 2004, Okhla Garment & Textile Cluster (OGTC), a cluster centric approach, is the first of its kind with mission excellence as its motto. Though the members are not having physical proximity but are clear in their minds that success can only be achieved through collective thinking and cooperation. Like minded entrepreneurs got together and created OGTC to primarily strengthen each member by complementing each other, by identifying best practices, implementing intensive collective training and adopting out of the box approach and provide inputs as a think tank to the garment industry.

In our short period of history, we have taken yeoman strides to assist our members to keep pace in the competitive environment. The foremost ongoing initiative is introduction of Industry 4.0 smart solutions through Technology providers. In addition, our members have reduced an equivalent of nearly 2000 tons of Carbon Footprint with the ultimate aim of going carbon neutral; in addition OGTC facilitated detailed energy audits of member factories; which has not only helped the users to identify the areas where they need to take corrective actions to conserve energy but also take preventive actions against fire accidents. Many members have participated in this drive. We are also playing a significant role towards women empowerment by providing gainful employment to over 50,000 women workforce.

### ABOUT OGTC CONFERENCE

It provides an environment for academicians, researchers and practitioners to exchange ideas and recent developments in the field of apparel manufacturing.

**A cross – disciplinary event, the idea is to explore creativity and the creative process through the lenses of imagination and innovation. The conference aims to develop a creative coalition which takes everybody on board.**

18<sup>th</sup> International Conference on Apparel & Home Textiles (ICAHT-2023) was held in collaboration with AEPC, Gurugram on 23<sup>rd</sup> September 2023. It was a matter of pride for us with over 275 delegates who attended the day long proceedings in addition to over 800 who viewed our proceedings live on the YouTube channel. The day long proceedings included 3 Panel Discussions and 4 Presentations. OGTC Conference was attended by different Manufacturing Units, Institutions, Consulting firms along with renowned professional speakers.

**For further details, if any, contact:**

#### **ORGANIZING COMMITTEE:**

**Mr. PMS Uppal, Chairman**  
**Col. S. Kapoor, Conference Chairman**  
**(M): 09810100793**

#### **CONFERENCE SECRETARIAT**

#### **OKHLA GARMENT & TEXTILE CLUSTER**

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