

Textile, Garment and Fashion Industry in Odisha, Prospects and Challenges

B. BASU

Textile Technologist, Thane, Maharashtra.

1. Introduction

After Agriculture, Textile and Clothing Industry is the second highest employer in India with 4% GDP, 14% of the country's Industrial Production and avg.13.1 % of the country's foreign exchange earner. This is the one of the oldest Industry in India and is mainly divided into (i) Handloom sector, (ii) Power loom sector (iii) Organised sectors. This Industry is in general suffering because of improper Govt policy, unskilled labours, higher labour cost in organised sectors, lack in vision and mission, old machineries, more power cost, hunger for quick return, etc.

To save this Textile Industry, it needs to improve productivity, Quality, Export in comparison to China, Bangladesh with cost effectiveness and to create market in abroad. Modernisation, Skill improvements, effective Managements are need of the hour. Our Export is avg 38.9 Billion dollars among 296.4 Bn Dollar of whole Export of the country. We have 19% raw material available out of the whole world whereas China is having 21%. But our export is only 38.9 Billion dollars as against China's 370 Billion Dollar. It provides job to 45 million people directly and 60 million people in Textile Industry can save the Nation w.r.t. employment, growth & GDP, can reduce Trade & Fiscal Deficit.

In the world of "Roti Kapada our Makan", the importance of the Textile Sectors is playing a vital role in employment, revenue earnings, Export potential and GDP. In the earlier days this Industry was pioneer and lucrative and hence grown up substantially till 1960. But because of growing competition with other Industries, the Textile Industry started suffocating. The Textile tycoons started to shift in other more profitable Industries. In the year 1982, the strike called by Dr. Datta Sawant crippled the Organised sectors. On the other hand, the decentralised sectors started booming. In the year 1968, the NTC was formed to save guard the employment of the Organised sectors but later on it became a burden on Ministry of Textile.

The Mills land became golden property for all and the Mill owners including NTC Mills sold the properties where several Sky scrapers are seen now.

The state of Odisha in always a pioneer in Textile Sector mainly in Handloom and also in Handicraft. The Handloom Industry of Odisha is one of the oldest way to earn bread among the people. It is always remained famous in producing World famous products like "Katki saree", "Sambalpuri Saree", various silk sarees, Tassar Saree, Tie-dye, Bomkai Cotton, glossy khanduas, "Gamchas", furnishing and Handicrafts.

The page no 2 has shown some of its product range.

But unfortunately, there are some shortfalls in growth of this industry in this viable state because of some policy matters, initiatives and foresight ness. This paper has highlighted a few of them.





The above pictures are the famous and beautiful Odisha Product . The wall piece , the lady with top are the fashion of today's . The handi craft is the most attractive . The Ajanta Painting on cloth is an Export variety on bed sheet , wall piece, table mat.

[2] About Textile Industries in India :

About This Industry: The oldest way to earn livelihood is farming, Textiles and various types of small professions (like preparation of earthen pots, blacksmith jobs etc.) The Textile Industries started taking its own shape gradually with growing population and its needs. The first modern cotton textile mill was set up in 1818 at Fort Gloster near Kolkata. But this mill could not survive and had to be closed down. The first successful modern cotton textile mill was established in Mumbai in 1854 by a local Parsi entrepreneur C.N. Dewar. Shahpur mill in 1861 and Calico mill in 1863 at Ahmedabad were other landmarks in the development of Indian cotton textile industry.

The real expansion of cotton textile industry took place in 1870's. By 1875-76 the number of mills rose to 47 of which over 60 per cent were located in Mumbai city alone. The industry continued to progress till the outbreak of the First World War in 1914. The total number of mills reached 271 providing employment to about 2.6 lakh persons. In those days till 1950 – 60 it used to be known as Golden Industries.

Then this Industry started falling sick because of cheaper cloths started produced by Power loom and Hand Loom sectors. Other lucrative Industries started business such as Iron & Steel, shipping, Cement, Hospitality, Transport, IT, automobiles,

Housing developments and so many. Money started siphoning from Textiles to other Profit making Industries.

The Organised sectors started suffering because of high power cost, high labour force, labour unrest, high cost of production, lack in modernisation (who modernised in time were the survivor, say Arvind, Raymond's, Bombay Dyeing etc.), less fabric cost realisation and overall Govt policy.

The competitiveness of composite mills has declined in comparison to power looms in the decentralised segment. Policy restrictions relating to labour laws and the fiscal advantages enjoyed by unorganised sectors are two of the major constraints that are responsible for the decline. The number of composite mills in India decreased from 285 in 1999-00 to 177 in January 2009.

Table – 1 Textile Industry – over view (source: Ministry of Textile) (6.iii)

Items	Units	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13 (provision)
Spg. Mills (Non -SSI)	No	1597	1653	1673	1757	1761	1762
Composite Mills (Non-SSI)	No	176	177	180	183	196	199
Total	No	1773	1830	1853	1940	1957	1961
Exclusive Wvg. Mills, Non -SSI	No	179	184	183	174	173	173
Spg. Mills – SSI	No	1219	1247	1260	1333	1336	1340
Power Looms – Units	Lakh no	4.69	4.94	5.05	5.18	5.20	3.12
Looms (organised sectors)	Lakh No	0.56	0.57	0.57	0.53	0.52	0.52
Hand Looms	Lakh no.	38.91	38.91	23.77	23.77	23.77	23.77

Table – 2, No of power looms in India (Resource: Ministry of Textile)

Year	No. Of power Looms	Growth %
2009- 2010	22,46,474	1.90%
2010-2011	22,82,744	1.61%
2011-2012	22,98,377	0.68%
2012-2013	23,47,249	2.08%
2013- 2014	23,67,594	0.86%
2014-2015(up to Nov – 2014)	24,34,717 (inclusive of 2 lakhs shuttle less looms)	2.74%

The no of power looms in India is increasing gradually because of easy investments. But how many of them are at comfort positions? How many of them can sustain for a long time?

Table – 3 : NO OF COTTON / MAN-MADE FIBRE MILLS AND CLOSURE POSITION (Non –SSI)

As On	No Of Mills			No of Mills closed		
	Spg.	Composite	Total	Spg	Composite	Total
31.03.02	1579	281	1860	295	126	421
31.03.03	1599	276	1875	350	134	484
31.03.04	1564	223	1787	374	94	468
31.03.05	1566	223	1789	379	99	478
31.03.06	1570	210	1780	387	96	483
31.03.07	1608	200	1808	381	87	468
31.03.08	1597	176	1773	318	63	381
31.03.09	1653	177	1830	340	65	405
31.03.10	1673	180	1853	365	68	433
31.03.11	1757	183	1940	471	81	552
31.03.12	1761	196	1957	475	84	559
31.03.13	1771	198	1969	487	84	571
31.03.14	1757	197	1954	457	81	538
31.03.15	1776	200	1976	478	81	559

- During Mar., 2015, two spinning mills were closed and no composite mill was closed, no spinning mill was reopened or no composite mill was reopened, keeping the total closed mill to 559. The 559 closed textile mills had an installed capacity of 10.21 million spindles, 1.29 lakh rotors, 0.36 lakh looms and 2.86 lakh workers on roll as on 31.03.2015.
- Out of 559 closed mills, 39 mills are under Official Liquidator.
- From the above table it is found that in one way, the number of Mills are increasing especially the Spinning Mills, other way about 28% mills are closed down.
- The looms in Organised sector is not much growing but the power looms are growing gradually.

[3] Why the Textile Mills Closed Down in India?

It is a fact that the Textile Industry has lost its glories. In earlier days it was known as golden business and the Jute was known as the golden crops of Bengal. Gradually this Industry has come to such a condition that hardly any new composite mills are installed for last several years. The cotton fabrics are taken by Polyester Industries and hence the Manmade Fibre Industry in zooming although not at par with Chemical & Fertilisers, Iron & Steel, Cement, Estate, Oil & Petroleum, Pharmaceuticals, Hospitality, Sugar, Shipping, Education, Transport, Telecommunication, Medical & Health care and service industries etc. It is the poorest paid salary among all other Industries and hence the new generation of student's are showing least interest in studying the Textile Engineering. Hence some Engineering colleges have stopped taking students in Textile course. The causes are:

- **Unprofessional Management:** The Mission, Vision and Strategic planning's were prepared within the periphery of 4 walls. However, the Brand Imaged organisations are surviving (Fully or Partly) because of their professionalism and good Managerial Capacity.
- **Quick Bucks:** Most of the Textile Managements siphoned off the money from this Industry because of low profit abilities and invest to some other profit making organisation
- **Shifted Mills:** Almost all the organised sectors in Central Mumbai sold out the lands and the factories are either closed down or shifted to some other places.
- **Family Dispute:** Some mills closed down their shutters because of the dispute within the family. Hence the Business was closed or divided

- **Not willing to run the Industries:** Some Industries totally closed down their shutters, sold out the mill lands and invested somewhere at 'no risk zone' or enjoying retire life.
- **Mills situated at unsuitable place:** Some mills were closed down because of not suitable location. Similarly, the Jute is mostly produced at Bangla Desh and the Looms are at West Bengal.
- **Not conversed with latest Production/ no diversion:** Some of the industries were strict with their traditional product only. Time to time there is change in fashion and those who followed the latest trends were survived.
 - **Per capita Cloth Consumption:**

Per capita Cloth Consumption (Sq.Mtr)				
	India	US	EU	China
year 2005	19	680	647	52
year 2010	30	690	701	119
Year 2015	44	727	729	209
source ITMF				

Although the per capita consumption of cloth has increased in India which is mainly due to growth in Population and mainly fashion trends in urban areas. In comparison to other leading Nations, our contribution is too low. That leads to excess stock pile up in Textile godowns forcing the entrepreneurs to curtail the production or closing down the units.

- **Old and obsolete machineries/ Not modernised:** As per the report from the Office of Textile Commissioner, in March 2015 there are 1, 20,000 shuttle less looms in comparison to world's population of 20, 00000 Shuttle less looms contributing to 6% only. In spinning sector, 49 million rotors are in India in comparison to 2500 million of Spindles of world which is 20%. It is including SSI & Non SSI units. (Source, Textile commissioner office).
- **Raw material cost:** High and fluctuating Raw material cost, high Power tariff and power cuts, more labour oriented, high price of spares and stores, more maintenance cost and in comparison, less profit margin and poor return, high operation cost, steep competition forced most of the Organised sectors to close down the shutters.
- **High conversion cost from fibre to fabric:** The high costs of conversions are mainly due to power, labour, duties, power failures, high maintenance cost etc. So many mills have controlled power consumption by adopting various methods, till it is at higher side.

- **Misc Challenges:** Threat from the SSI / Power loom sectors, Slack demand, Steep increase in Project cost. Disturbed industrial relation, untrained workers and staffs, too much pressure on the employees and unpleasant working atmosphere.

[4] National Textile Corporation, India.

- Today only 24 units are functioning all over India. Out of 4, rest are in South India.
- Only 4 are having weaving & Spinning Unit, rest are only Spinning units.
- Spindles- 7.09 lakhs Looms – 386
- Out of 86 showrooms, 25 showrooms are in profit.
- Cloth worth Rs.255 lakhs has been exported during the year 2008-09 and Rs. 631 lacs during 2009-10 and export worth Rs.16.98 Crores has been made during 2010-11 and Rs. 50.11 Crores 2011-12.
- In the first phase of revival, the cost of modernization is Rs.530 crores which has been increased to Rs.1155 crores and approved by BIFR in the second phase. The total cost of revival of the company is Rs.9102 crores, including MVRs, payment of old arrears of statutory dues etc.
- In spite of all, NTC is unable to compete with the Brand Image Textiles. Because of Mismanagement like all other Govt bodies, its running cost is very high. As per the opinion of the Financial Experts, it is better to discontinue all the present mills, sale out the properties and donate to Nation rather than to make burden on Public money.

[5] Organised sectors in Odisha:

There was only one Textile mill in Odisha name as Odisha Textile Mills at Choudwar of Mr. Biju Patnaik, from 1950 to 2001 and was closed down. There was another NTC Mills name as Odisha cotton mill at Bhagatpur established on sept `1946 and worked for 69 years and 11 months and now closed.

Industrial Development Corporation of Orissa Ltd (IDCOL) have set up three Spinning mills as under so that the Handloom Weavers in Orissa can source quality yarn at reasonable prices. The three units were set up between 1981 to 1986. But due to management failure, corruption and so many other issues closed down one after another. Out of the 3 units, 2 have been

taken over by Sarda Group in Kolkatta and are being rerun by them.

1. Sonepur Spinning Mills, Sonepur--and closed now.
2. Baripada Spinning Mills, Baripada--Now being run by Sarda Group from 2007
3. Aska Spinning Mills, Aska--Now being run by Sarda Group

Similarly, Director of Textiles, Govt of Orissa have set up Cooperative Spinning Mills as under,

1. Orissa Weavers Cooperative Spinning Mills, Bargarh
2. Utkal Weavers Co-op Spinning Mills, Denkanal
3. Kalinga weaver's co-op Spinning Mills,
4. Gangpur Weavers Co-op Spinning mills, Gangpur (Near Rourkela) Taken Over by a Pvt Group in Kolkatta and is being run as Ashoka Multi yarn ltd and is a profitable unit. Utkal is also taken by Ashoka Multi Yarn. The other 2 are closed now.

Handlooms and Textiles and Handicrafts Minister Snehangini Chhuria informed that all the six cooperative spinning mills of the State have been out of operation since long.

The mills are the (1) Shree Jagannath Weavers' Cooperative Spinning Mill at Nuapatna in Cuttack district, the (2) Kalinga Weavers' Cooperative Spinning Mill at Gobindpur in Dhenkanal district, (3) Shree Gopinath Weavers' Cooperative Spinning Mill at Baliapal in Baleswar district, (4) the Utkal Weavers' Cooperative Spinning Mill at Mukundaprasad in Khordha district, (5) the Odisha Weavers' Cooperative Spinning Mill at Toral in Bargarh district and (6) Shree Sarala Weavers' Cooperative Spinning Mill at Tirtol in Jagatsinghpur. Chhuria said the liquidation process for the Shree Jagannath Weavers' Cooperative Spinning Mill was started on August 22, 2005.

The causes of the closure of the Cooperative Spinning Mills are (1) Lack in initiative by State Govt (2) Mismanagement (3) Improper strategic planning, Mission & vision. (as told by the Office of the Commissioner of Textiles)

[6] The power loom Sectors at Odisha:

Out of 25 lakhs power loom in India, the Odisha is having about 1793 installed power looms. The capacity utilisation is not 100%. Most of them run just in one shift of 8-12 hours' maximum. The table - 4 is highlighting the fact. (source: Ministry of Textile)

Condition of Power Looms in Odisha										
Place	No of Looms	In Operation	Total workers Employed	Avg. Wages	Working Hours	Whether Registered	Yarn consumption (in lakh Kg)		Fabric Production (Lakh Mtr)	
							2010-11	2011-12	2010-11	2011-12
Khurda	553	85%	1166	120-150/-	262 days, one shift / day	one / 305 in SSI	3.15 (cot-2.65, cot/vis-0.5)	5.8(cot-5.3, cot/vis-0.5)	68.9(only cotton Gamcha)	69.1(only cot gamcha)
Ganjam	435	90%	913(only 3 are women)	120-150/-	290 days,one shift /day	Yes in SSI	4.34	5.04	18.9	17.87
Dhenkanal	451	100%	971	120-150/-	265 days, one shift/day	Except one in SSI	5.02	5.19	22.69	22.7
Cuttack	155	NA	338	120-150/-	308days, one shift / day of 10 hours	58 units in SSI and 3 in Dist Industries Centre	1.55(cot-1.05, Cot/vis-0.5)	1.85(cot-1.05, cot/vis-0.8)	3.6(cot, cot/vis)	4.5(cot, cot/vis)
Nayagarh	103	NA	201	100-150/-	271days, one shift/day	Out of 56, 36 in SSI &1 in DIC	1.13	1.13	5.23	4.51
Puri	96	NA	203	120-150/-	311days, one shift /day	out of 58, 33 in SSI & 2 in DIC	72,150 KG	12,295kg	2.89	2.89
Total	1793		3788							

The reasons for such poor show are;(as told by power loom service centre)

- There is no big entrepreneur to run the show. No capital investment.
- If there is capital, there is no “knowhow”. No proper support from top.
- There is no scope of getting Sized beam nor any scope for Wet processing.
- Although land, electricity, labours are available at cheaper rate, there is lack in initiative.
- No skilled labour is available.
- It requires fund, but although funds may be available, no one is coming forward.

About Power looms: (source: Nielsen, Ministry of Textile)

- Gamcha is the main product in these areas.
- All the looms are ordinary over pick looms. No auto loom is found,
- 95% yarns are cotton used in Gamcha. The cot-viscose is also used for Lungi.
- They take loan from the money lenders at High interest rate. Not much aware of “Pradhan Mantri Jandhan Yojona”. Here they can take loan with interest of 9.54% up to 5 lakhs. But they are not much aware of that scheme although it was launched in 15th August 2014. The local bodies such as Gramin Panchayets, BDO Etc. should come forward to help them in getting loan. It can be made

popular through these Govt bodies. Bank requires small introduction. They can directly approach any Nationalised Bank (source: State Bank).

- Yarn price is an issue. Ministry of Textile has started “Yarn Bank” and Providing “Corpus Integrated Scheme for Power Loom Sector Development” (ISPSD) but as such the takers are very few (source: Ministry of Textile).
- No proper knowledge of Marketing. (massive support, Industrial Research are need of the hour)
- Lack of Skilled labour. ISDS has started by the Ministry of Textile, but this is a failure Project.
- No proper Quality Checking System. It requires skill guidance.
- They are not aware of TUF. TUF is not applicable for the Power Looms.
- No one is having ISO certifications.
- They do their own production or Job Work.
- They have implemented GIS. That benefits labours.

[7] The Hand loom Sectors in Odisha:

(7.1) The Handloom Industry in Odisha is the largest cottage Industry providing employment and sustenance to 4 % of the population of the State. Right from producing superior artistic fabrics of

excellence, this Industry also produces utility fabrics for the common masses at cheaper cost. However, in face of teething competition in open market, the strengthening of the Industry and its diversification is the continuous need for its survival is being provided by Govt. assistance in different forms. To achieve this end, different schemes have been formulated and are working under the Textile Directorate of the state. It is having 1.19 lakh number of looms in the state. Of which 88186 nos of looms have been brought under the cooperative fold and developmental activities are mostly being under taken in this organized sector under the directorate of Textiles.

During the 11th five-year plan commencing from the financial year of 2007-08 to 2011-2012, handloom cloth of 350.45 lakh square meters valued at Rs 21931.62 lakh were produced till the end of 2008-09, generating employment to 103264 weavers. (Handloom development corporation of India).

(7.2) Important Handloom Centres in Odisha (Table -5)

Centers	Products name
Bargarh	Bed cover, dress materials, cotton tie & dye saree, silk saree, coarse cotton saree & others
Sonepur Boudh	Silk bomkai saree, tie & dye cotton saree, furnishing & silk tie & dye saree
Nuapatna	Silk khandua saree, calligraphy tassar saree & furnishing, coarse cotton saree & others.
Jagatsinghpur	Fine count cotton saree.
Kotpad	Vegetable dye saree & scarf, coarse cotton saree & others
Mayurbhanj, Gopalpur, Fakirpur, Mankidia	Tassar saree & furnishing, coarse cotton saree & others
Berhampur	Silk saree, coarse cotton saree & others
Kalahandi	Habaspuri saree, coarse cotton saree & others
Bolangir	Tie & dye cotton saree & furnishings, silk tie & dye saree, coarse cotton saree & others
Nayagarh, Puri, Gajapati, Rayagada, Nawarangpur, Nawapada, Malkangiri, Dhenkanal, Kendrapa, Bhadrak, Sundergarh, Sambalpur	Coarse cotton saree & others

(7.3) Handloom Clusters in India (Ministry of Textiles)

There are 20 Handloom Clusters in India; Bijay Nagar (Ajmer), Bargarh (Odisha), Barabanki(UP), Bhagalpur (Bihar), Bijnore(UP), Burdhaman (W.B), Chirala (AP), Gadag (Karnataka), Gwalior (MP), Imphal (NE), Kullu(HP), Kurinjipudi(TN), Madhavaram(TN), Mubarakpur (UP), Nadia (WB), Sonepur (Odisha), Thiruvannamalai (TN), Trichy (TN), Thiruvanthapuram (Kerala), Vanarasi (UP).

(7.4) About Hand looms and it's marketing in India.

(source: Handloom development corporation of India.

Lack of promotion and publicity of handloom products specifically apparels; have led to minimum awareness and interest within the young generation thus translating into very limited usage of handloom products. ♣

However, it has emerged from the survey that, home furnishing products made of handloom are considerably popular and preferred as they are durable (curtains/ cushion covers) and perceived to be good for skin (bed sheets and covers).

Cotton considered to be the most popular fabric as regular formal wear ♣ Fabric quality considered most important in case of formals ♣ Branded products preferred for formal wear as they assure of the quality of the fabric, the colour, fit and design. Price not an issue

Kind of design & colour variety required • Readymade or dress material preferred • Fabric quality with terms of longevity, extent of maintenance free required.

Handloom products are known to all but usage is significantly nominal ♣ Handloom/ khadi products gives a different but mature look and hence was found suitable for elders only ♣ Handloom products conceptualized as something which is coarse, not fine, with different but limited designs and colour ♣ Publicity of handloom products were too poor to recall ♣ To gain popularity, handloom products have to be better designed, more abundantly available, and maintenance free.

Young people from Kolkata and Hyderabad were found to be fonder of handloom products than Delhi & Mumbai. They acknowledge handloom products as aesthetically different and regard it suitable for religious and serious occasions. - "I wear handloom products when visiting a temple or a relative's place. I also wear it on important official meetings as it gives a dignified and matured look."

The thread and weave pattern can be seen; gap in weaving ♣ The cloth surface is slightly rough ♣ The cloth thickness is more than normal cloth ♣ The colours are slightly dull ♣ Simple designs with unique embroidery not gaudy ♣ Itchy when you wear it ♣ More expensive than mill made ♣ Less colour options ♣ Same repetitive designs, mostly bridal prints/pots designs, elephants, dolls, Rajashatni/lady designs/Lord Krishna prints/ tribal prints or Gods ♣ Not available at all places, seasonal and only available at Exhibitions.

♣ Storage and maintenance of handloom products are very difficult and time consuming ♣ Handloom needs starching and ironing after every use ♣ Sometimes after starching starch patches on the clothes remains ♣ Within few days of wash, handloom products starts giving an older look ♣ Fading of colour after few washes; blues and reds fade faster.

Why this Industry is suffering?

- There is no Technical Upgradation. Whatever is produced that is continued as tradition.
- The opening of Handloom shop without any proper Market survey. *(see guidance at point no13)
- No proper skill development.
- The products manufactured were not always need based. Hence pile up of the stocks.
- Competition from other power looms and polyester fabrics. (Khadi is costlier than polyester. If Gandhi Ji would have alive, he would have wear Polyester says Sanjay Garg, Mumbai Mirror dated 21st August `16)
- No proper strategic Planning nor professionalism.

The Export of Handloom from Odisha:

Export of handloom products was Rs.1253 crore (US\$ 241 Million) during FY 2009-10 and witnessed a steady increase during the FYs 2010-11, 2011-12 and 2012-13 registering Rs.1575 crore (US\$ 303 Million), Rs.2624 crore (US\$ 505 Million) and Rs.2812 crore (US\$ 521 Million) respectively. Subsequently export witnessed a decline during FY 2013-14 registering Rs.2233 crore (US\$ 372 Million). However, export has marginally increased during FY 2014-15 reaching Rs.2246 crore (US\$ 374 Million). (handloom export promotion council of India)

- The export declined in the year 2014-15 in the countries like, USA, Japan, Saudi Arabia, Canada.
- The main products of Export are; Bath Mat, scarves of silk, bed linen printed(cot), bed sheet, bed cover, furnishing articles, Terry

Towel etc. Very few export is done on Dhoti, saree.

- As per the Reports published in TOI, dated 29th May `16 that Khadi Fabric sales up by 29%, cross Rs.1500 CR for the first time which were mostly at back door and was a limited user by the limited people. The main steps were taken are inclusion of value added productions, various types of products which can be used by the common people in large scale.
- Similarly, the Economic Times, dated 25th June `16 says that India's apparel exports can more than double to \$43 billion in the next three years as projected by Textile Ministry. The largest Textile exporter China raised wages hence given opportunity to India. The employment norms in the Garment Industry where demand is highly seasonal would be made more flexible allowing 150 days' contracts and more overtime to meet high demand. In tandem the TUF subsidy has raised from 15% to 25%.
- The apparel and Garment sector has to modernised and to made them IT and internet enabled, to improve the speed and quality of production, reduce time lines and deliveries, to keep up with changing fashion trends.

[7.5] The Fashion Trend in Odisha :

Western-style dress has gained greater acceptance in cities and towns among men, although the people prefer to wear traditional dresses like Dhoti, Kurtha and Gamucha during festivals or other religious occasions. Women normally prefer to wear the Saris (Sambalpuri Sari, Bomkai Sari, Katakai Sari) or the Shalwar kameez; western attire is becoming popular among younger women in cities and towns. The denims being used in large scale among the young generation but no manufacturer is found at Odisha.

[8] The Garment Sectors at Odisha.

There are several garment manufacturers are available (the exact fig, not available) mainly at Urban areas. Such as Parke Davis(Jeans), SN Garments (shirting), UNI source (ladies readymade), Krishna Kali (ladies embroidered readymade), EssBee Traders (Children readymade) and so on.

Madura Fashion & Lifestyle (MFL), an Aditya Birla Group enterprise, has proposed to set up a greenfield garment manufacturing unit in Odisha. It has sought 6-8 acres of developed land in Mancheswar industrial area in the city along

with other incentive and concessions for putting up the facility.

MFL is the largest player in premium branded apparel segment known for brands like Allen Solly, Van Heusen, Louis Philippe and Peter England. The lifestyle player has lined up an investment of Rs 75 crore in three phases with an overall production capacity of 4.2 million pieces per annum for the Odisha unit.

Total manpower requirement is pegged at 4,600 in all the three phases. The company is keen to create 11 ancillary units around the proposed plant that include three washing units, three goods packaging units and five embroidery units. Madura has sought allotment of land at concessional rates, capital subsidy of 25 per cent on total investments made on the plant and an interest subsidy of five per cent on the overall investment.

The company has requested full waiver on VAT (value added tax) and central sales tax (CST) for eight years from the date of commencement of operation. It has also sought full reimbursement on entry tax on plant and machinery and capital goods and raw material inputs for production of finished goods.

“We are keenly looking at establishing our base for manufacturing and selling from the state of Odisha and meet the requirement of northern India market in future and developing in a phased manner a strong manufacturing and warehousing hub for MFL. We believe Odisha as a state has great potential for us to establish and develop our business due to availability of labour, stable socio political environment, good infrastructure and defined political and economic support for the Table -6

growth of the industry in the state,” the company said in its proposal to the state government.

“Since this will be our first project in the state and being one of the early movers in setting up greenfield apparel garmenting unit, we are seeking active support from the state government towards infrastructure and incentives to make our investment attractive and financially viable,” it added.

In the first phase, MFL will pump in Rs 40 crore on the project to create a production capacity of two million pieces. The plant, in the first phase, is poised to generate sales of Rs 250 crore for the company.

[9] The State Govt Initiative:

The following special package for weavers/artisans and sericulture farmers for the State was announced by Hon’ble Chief Minister on 8th January, 2013.

- (1) 20 nos. of Handloom/Handicrafts clusters will be developed.
 - (2) Premium assistance to weavers and artisans for enrolment under Insurance Scheme.
 - (3) Supply of Solar Lantern to weaver and artisan families.
 - (4) Supply of utility items like gumboot, torch light, umbrella and secateurs etc. to tassar farmers.
 - (5) Provision of Work shed-Cum-Housing to all deserving poor weavers and artisans under “Mo Kudia” Yojana.
 - (6) Provision of Old age pension to all eligible weavers and artisans under “Madhubabu Pension Scheme”.
 - (7) Creation of welfare fund with an initial corpus provision of Rs.50.00 lakh for sericulture farmers.
 - (8) Creation of welfare fund with an initial corpus provision of Rs.50.00 lakh for handicraft artisans.
- The point no (1) is implemented i.e.

Sonepur	Subarnapur	Entrepreneurship Development Institute of India (EDI), Near Village Bhat, Via Ahmedabad Airport & Indira Bridge, P.O. BHAT-382428, Distt. Gandhinagar (Gujarat)	Bomkai Design Tie & dye sarees, cotton sarees, dress material, shirting running material	210.76	Completed
Bargarh	Bargarh	Orissa State Handloom Weavers Coop. Society Ltd., Pandit Jawaharlal Nehru Marg, BHUBANESWAR-751001	Cotton Tie & dye saree, dress material lungi	167.62	Completed
Laxmiprasad	Boudh	Director of H&T 0674-2575783	sarees, dress materials	48.19	Completed

Patangarh	Bolangir	Director of H&T 0674-2575783	Mercerized cotton sarees with tie & dye border, anchal and buti	47.09	Completed
Jagatsinghpur	Keonjhar	WSC, Bhubneshwar	Lungies, furnishing and silk, tasar saree	52.00	Completed
Dunguripali	Sonepur	Udyogika	Dress material, Scarves	16.38	Completed

The rest are under ongoing process.

[10] The product range with manufacturing capacity in handloom sector.

Table :6 : Product Range Product wise Important Clusters with high Concentration of Weaver

(A) Silk tie-dye, Silk Bomkai & Cotton Bomkai Saree	Dist. - Boudh & Sonepur Blocks - 6 Looms - 6773 With a production potential of Rs. 4063.80 lakh
(B) Cotton tie-dye Saree and Furnishing	Dist. - Bargarh, Sonepur, Bolangir & Nuapada Blocks - 8 Looms - 8045 With a production potential of Rs. 3816.60 lakh
(C) Tasar thana Saree and Furnishing	Dist. - Bargarh, Jajpur, Balasore & Nuapada Blocks - 3 Looms - 2424 With a production potential of Rs. 1163.52 lakh
(D) Khandua Silk Saree	Dist. - Cuttack Blocks - 2 Looms - 2255 With a production potential of Rs. 1217.70 lakh
(E) Berhampur Silk Saree Joda	Dist. - Ganjam Blocks - 1 Looms - 609 With a production potential of Rs. 292.32 lakh
(F) Single count Fine Cotton Saree (60s & above)	Dist. - Jagatsinghpur Blocks - 2 Looms - 2234 With a production potential of Rs. 804.24 lakh
(G) Medium Variety Cotton (40s to 60s)	Dist. - Jajpur, Khurda, Bargarh, Bolangir, Ganjam & Nayagarh Blocks - 10 Looms - 5563 With a production potential of Rs. 2003.47 lakh
(H) Coarse Variety Cotton (upto 40s)	Dist. - Bolangir, Cuttack, Khurda, Kendrapara, Nayagarh, Puri, Nuapara, Kalahandi, Kandhamal, Balasore, Bhadrak & Sambalpur, Sonepur Blocks - 36 Looms - 17220 With a production potential of Rs. 5166.00 lakh

[11] The Textile parks, a mega project my MOT (Govt of India). The details are focussed at table no 7.

State	Operational	Under Implementation	New Approval	Total
Assam	-	-	1	1
AP	1	2	4	7
Bihar	-	-	1	1
Gujarat	7	1	5	13
Himachal	-	1	-	1
J&K	-	1	1	2
Karnataka	1	1	-	2
Maharashtra	4	8	4	16
MP	-	1	-	1
Punjab	1	2	1	4

Rajasthan	1	5	1	7
TN	2	7	-	9
Telangana	1	1	1	3
WB	-	2	-	2
Hariyana	-	-	1	1
UP	-	-	2	2
Total	18	32	24	74

In Odisha, till now no Textile park has come up. The O/O The Commissioner of Textile says that it is State Govt who should provide Land, electricity, water etc. For every Project, MOT (Govt of India) provide Rs. 40 CR paid in 7 instalments. Much initiatives are to be taken by the states who should invite the entrepreneurs.

[11-A] The name of the Techno parks who are in Operation.

1. Islampur Integrated Textile park
2. Latur Integrated Textile park
3. Sundar rao integrated Textile Park
4. Khed Textile Park
5. Dhule Integrated Textile Park
6. Amitara green Hi Tech Textile Park
7. Himmada Integrated Textile Park
8. Gunture Textile park
9. Kashmir Wool & Silk Textile Park
10. Palsana Textile Park
11. Satyaraj Textile Park
12. Rangaraya Textile Park
13. Shanti Integrated Textile Park
14. Aalishan Eco Textile Park
15. Eco – Tex Textile & Apparel Park
16. Shree Ganesh Integrated Textile Park pvt. Ltd
17. Tarakeshwara Textile Park Pvt. Ltd
18. NSP Infrastructure Park Pvt. Ltd.

[12] Possibilities and Potentialities in Developing Odisha Textile Industries in more Profitable Zone. (Expert view)

- The fashion trend to be made much more lucrative and profit making.
- The fashion is being inspired by myself seeing others beauty. (Film stars or any one)
- The Fashion is some mental requirements, match with social life, working style, day to day life.
- The fashion trend is what the mass especially the young generation are expecting! They want comfort, smart look, and satisfaction in his/her dress.
- If satisfied, it will bring positivity among them, bring good thought, increase abilities and then drive him in to fashion.

- The heritage value (handi works, batik print etc., tie dye) has some international market value.
- To start with E-Market, prepare web base, take the varieties of designs from different fashion designers, get it selected by voting method (gradation 1-10), then that mass accepted design can be manufacturing and can be marketed by renowned manufacturers say pantaloons, Aditya Birla group etc.
- From the conventional “gamcha” the application areas can be changed to garments, night dress, shorts, sportswear etc. The manufacturing cost being low in Odisha, the same can be sold to other states by the brand name manufacturers or by the state govt.
- Kantha stitch is a popular brand in Odisha and so many ladies are expert in doing it. They can be utilised and employment generation can be done.
- The Boyonika, weaver’s cooperatives, NIFT etc can have enough R&D *(see pt no 13) in these aspects, can take opinions from the experts and to see that the Organisations run in profit.
- No blame game should be entertained.

[13] How to make Market Survey?

Quantitative/Qualitative parameters for evaluation will be:

- Market size
- Maturity level of the market
- Growth rate
- Competition intensity
- Complexity of the product segment
- Consumer trends
- Strategic fit with company’s vision and strengths

Consumer Research entails conducting focus group interviews (FGDs) of target consumers in few selected cities to understand their buying behaviours, buying parameters and other aspects.

Some of the key questions that will be answered include:

- Who are the core consumers of the identified target categories?

- How often do they buy the target categories?
- What is their average spending per visit?
- With whom do they generally go to buy apparel categories– friends/family/spouse/etc.?
- What type of market do consumers prefer for apparel shopping - malls or high street / open market?
- What type of outlet do consumers prefer for apparel shopping – EBOs, MBOs or department stores?
- What factors influence the buying decision e.g. brand image, product, quality, pricing, brand ambassador, discounts, easy availability, etc?
- What form of communication is most effective/preferred in driving consumption – print, TV, social media, online, SMS, emails, catalogues, malls, word of mouth, etc?
- What are the gaps in the current market offering?

[14] The Textile Policy – 1st July `15 (Ministry of Textile)

1. Creation of 35 million jobs by attracting foreign investments.
2. Rs. 12000 CR. To be spend on Technical Upgradation Fund (2012-2017)
3. To establish one modern apparel garment manufacturing Centre in every NE state for Rs. 20 CR.
4. **EXPORT PROMOTION SCHEMES AVAILABLE FOR TEXTILE SECTOR FIRMS IN INDIA.** Merchandize Exports from India (MEIS) Scheme Launched in April 2015, the MEIS provides duty reward to eligible textile and apparel categories to an extent of 2-5% of FOB value in the countries categorized as per the criteria prescribed.
5. **Technical Textile Scheme:** Technical textiles are functional fabrics that have applications across various industries including automobiles, civil engineering and construction, agriculture, healthcare, industrial safety, personal protection etc. Based on usage, there are 12 technical textile segments; Agrotech, Meditech, Buildtech, Mobiltech, Clothtech, Oekotech, Geotech, Packtech, Hometech, Protech, Indutech and Sportech.
 - (i) Globally, the technical textiles contribute to about 27 percent of textile industry, in some of the western countries its share is even 50 percent while in India it is a meagre 11 percent.
 - (ii) Government of India has allowed up to 100% FDI under automatic route for the technical textiles segment.
 - (iii) Investment promotion schemes by Government Investors establishing technical textile unit in India can avail several benefits from central government schemes: • Technology Upgradation Fund Scheme (TUFS) • Scheme for Integrated Textile Parks (SITP) • Coverage of major machinery for technical textile manufacturing under concessional customs duty list of 5% • Certain technical textile products are covered under Focus Product Scheme, under which exports of such products carry duty credit scrip equivalent to 2% of FOB value of exports • Technology Mission on Technical Textiles (TMTT) , Focus Incubation Centres (FIC) , Scheme for promoting usage of Agro-textiles in India (excluding North East Region) • Scheme for promoting usage of Agro-textiles in North East Region • Scheme for promoting usage of Geotechnical textiles in North East Region
 - (iv) Setting up of four Centres of Excellence (COEs).
6. **Scheme Guidelines for Pilot Phase to set up Incubation Centres in Apparel Manufacturing.** The size of the Indian apparel is estimated to be \$45 billion and it is expected to grow up to \$200 billion by 2025. The Government of India have taken necessary measures to strengthen the apparel Industry. For every Rs.1 Lakh investment in the Industry, an average of 7 additional jobs is created. Therefore, there is need to promote apparel manufacturing sector for creation of employment, increasing export earnings and provide fill up to the national economy.
7. **Scheme Guidelines for Pilot Phase of Textile Industry Workers' Hostel.** To attract the manpower from different areas and to retain them, this scheme is floated near the Textile parks.
8. **Guidelines for Centrally Sponsored Scheme for Integrated Processing Development Scheme (IPDS):** The Textile Processing Units are known as 'hazardous' with stringent regulations. It needs highly pollution control with effluent plants. The Ministry had in the 11th Five-year plan launched a scheme for Integrated Textile Parks (ITP). Based on the experience of the above scheme as well as the peculiar challenges faced by the textile processing sector the Ministry has decided to formulate a new program called as Scheme for Integrated Textile Processing Development (IPDS).

9. Development of Mega Cluster

Scheme: (i) Comprehensive Handloom Cluster Development scheme (CHCDS) (II) Comprehensive Handicraft Cluster Development Scheme (CHCDS).

The prospects of this sector lie in infrastructural Upgradation, modernization of the machinery and product diversification. Innovative manufacturing as well as designing know-how, furthered by brand building of the native products hold the key to creating a niche market for the products manufactured by the clusters. The proposed programme is expected to support the Upgradation of infrastructural facilities coupled with market linkages and product diversification.

Agency, New Derhi.(iii) Mr. Swapan Banerjee Retired Director , Hand loom development corporation of India.

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[15] Conclusions:

- The Textile Industries are growing in India in spite of all constraints.
- To compete with China, Bangladesh we have to have more Garment Manufacturing units especially at Rural areas where cheap labours are available and side by side there will be much employment generation.
- In Odisha state the Handloom and handicrafts are encouraging, fetching Export earnings but there is lacuna which are to be fulfilled. It is to seen for the quality and price aspects. It should be reached to the mass.
- The Garment sectors are to be more encouraged for earning more revenue and employment.
- If there is no Organised sector, the emphasis is to be given on More Power looms sectors. Shuttle less looms should be given priority so that the quality cloths can be manufactured at this state itself and the mass can get benefit of the same.
- Entrepreneurs are to be invited for the same with the initiative of the State Govt.

[16] Literature survey:

- Textile Industry and Indian Economics, By: B. BASU. Presented at International conference at Mata Vaishna Devi University, Katra on 29th July`16.
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- Expert Opinions (i) Mr. D.Das Choudhury, Director, Nagarika Export, Mumbai. (ii) Mr.P.C.Basu , Advisor, Engineering &