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INDIA ITME Issue

The **ONLY** National Textile Daily



INDIA INTERNATIONAL TEXTILE
MACHINERY EXHIBITIONS SOCIETY
A Catalyst for Growth & Technological Excellence



INDIA ITME 2020



10 - 15 Dec 2020



India's Most Prestigious & Largest 'Textile Machinery Show'

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Venue: India Exposition Mart Limited. Plot No. 25, 27, 28, 29, Knowledge Park-II, Greater Noida, Uttar Pradesh 201306



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INDIA ITME 2020

11th India International Textile Machinery Exhibition



**December
2020**

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Explore New Opportunities in the Textile Industry.

CELEBRATE THE SOUL OF TEXTILES

Trusted name for Quality and Commitment



S. Hari Shankar
Chairman
India ITME Society

***'40 Years of Spearheading Innovation
with Commitment to Quality.'***

India International Textile Machinery Exhibitions Society or 'India ITME Society' is a non profit apex industry body established in 1980 with the sole motto to support & serve the Textile Engineering Industry through Exhibitions & Events.

Marking its 40th Year, India ITME Society has opened a revolutionary pathway tracing its evolution with the memorable moments and ups & downs encountered in its tedious journey, 5 member Associations viz. TMMA, ITAMMA, TAI, CITI, BIS (Govt of India), have had a major role for India International Textile Machinery Exhibitions Society to reach this 40 year milestone.

India ITME Society was able to sustain the Industry patterns of growth by constantly encouraging technology upgradation and consistently offering world-class service by always evolving as an organisation and continuing to push the envelope on innovation to make sure it stayed ahead of the needs of the customers.

ITME Exhibition series growth graph has been upward since its inception however 2012 & 2016 have shown a commendable growth of 54% & 47 %. GTTES 2nd edition held in 2019, broke its own record in terms of Exhibitors, Visitors and Area. Spreading its wings overseas, ITME AFRICA is a new feather in the cap, which shall undoubtedly lead the Textile & Textile Technology Industry to self sufficiency and sustainable growth through textile investments and technological advancements alongwith granting an easy access to the latest textile engineering solutions.

Based on transparent, authentic and genuine parameters, a philosophy which is imbibed in the values of India ITME Society has evolved into a global phenomenon embracing internationalism and reaching out to emerging economics. It was with the founding vision of Late Shri Suresh Mehta, India ITME Society witnessed its first exhibition in 1980 & since then the legacy has been successfully lead by great visionaries from the Textile Industry.

Exhibition Industry has acclaimed India ITME Society for its exceptional service with awards like Excellence in Operations, Corporate Excellence, Knowledge Hub, Best Use of Technology, The Royal Show Category & The Mega Quality Award. Best amongst the most deserving, India ITME Society was conferred jointly by The Economic Times & IEIA as India's Top 10 Exhibition Organisers & INDIA ITME Exhibition ranked as India's 1st Runner up in Top B2B Exhibition.



INDIA INTERNATIONAL TEXTILE MACHINERY EXHIBITIONS SOCIETY

A-1210/1211 Dalamal Tower, 'A' Wing, 12th Floor, Plot No. 211, Nariman Point, Mumbai - 400 021, Maharashtra, India.
Contact : +91-22-4972 4603 / 2202 0032 / 2285 1579 Email: itme@india-itme.com Website: www.india-itme.com



Trusted name for Quality and Commitment



The road ahead shall be as challenging as unpredictable, but India ITME Society will continue to motivate and strengthen its capabilities to lead the Textile Industry in a better way.

Going ahead with a clear agenda on brand strategy in the Textile Engineering sector, India ITME Society will continue to deliver the best & excel as it goes forward. Humility of action, integrity of purpose and transparency of conduct will be the key traits driving India ITME Society's growth and journey forward into the next 40 years to come.

We at India ITME Society thank you very much for all the trust and your expressed interest you honoured us with and helped organize and manage our events as well as for providing all necessary support for an unforgettable experience.

Thank you for helping us grow.

S. Hari Shankar
Chairman - India ITME Society



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Greetings and Good wishes from India ITME Society!

With great pleasure I share with you that, "India ITME Society" shall host 11th edition of India ITME from 10th to 15th December 2020 at India Exposition Mart Ltd, (IEML) Greater Noida.

India ITME Society has strived to spearhead innovative technologies for textiles not only in India but also in the neighbouring countries. It is exciting that this pivotal business event has established its trust among the industry members and has proven beyond doubt, its commitment towards industry growth and business prosperity.

Having grown from strength to strength, India ITME 2020 shall see the largest of India ITME series and shall be held in the State of Art exhibition facility IEML at Greater Noida. The venue is easily accessible from nation's capital, Delhi.

We hope and strive to provide a spectacular event which shall also coincide with the completion of 40 years of the Society. As an event organiser, India ITME Society has become globally trusted name for quality and excellence and has successfully served the industry with commitment.

It is my pleasure and privilege to invite you to join us at India ITME 2020 to Celebrate the Soul of Textiles.

Look forward to welcoming you at India ITME 2020.

S. Hari Shankar

Chairman, INDIA ITME Society





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Overview of Cotton Textile Exports from India



Dr. K V Srinivasan
Chairman, TEXPROCIL

The WTO anticipates that world trade will continue to face strong headwinds in 2019 and 2020 after growing more slowly than expected in 2018 due to rising trade tensions and increased economic uncertainty. WTO economists expect merchandise trade volume growth to fall to 2.6% in 2019 - down from 3.0% in 2018. Escalating trade tensions and tighter credit market conditions in important markets are also likely to slow trade growth in 2019, as per WTO economists.

In India, the cumulative value of total exports (all commodities) during April-March 2019 stood at USD 331.02 billion compared to USD 303.53 billion during April-March 2018, registering a growth of 9.06 percent. The merchandise exports in April-March 2019 are the highest ever, surpassing the earlier peak of USD 314.4 billion achieved in 2013-14.

The economy has achieved high growth amidst significant improvements in macro-economic stability, mainly on the strength of ongoing structural reforms, fiscal discipline, efficient delivery of services and financial inclusion. However, global demand is a major driver of India's exports. If the growth falls it will certainly have an impact on the export growth outlook for the country. Important macro-economic challenges faced by the economy are global headwinds like rising trade tensions and geo-political uncertainties in some parts of the world, and financial health of banking sector.

India's Cotton Textile Trade - An Introduction

The Indian cotton textile industry over the years has maintained a healthy growth rate. Cotton plays an important role in the Indian economy as the country's textile industry is predominantly cotton based. India is one of the largest producers as well as exporters of cotton yarn. The states of Gujarat, Maharashtra, Telangana, Andhra Pradesh, Karnataka, Madhya Pradesh, Haryana, Rajasthan, and Punjab are the major cotton producers in India.

The industry continued to face several challenges during the fiscal year 2018-19 relating to global headwinds, price fluctuations of raw materials like cotton, high cost of utilities like power & fuel and infrastructural bottlenecks including high logistics and transaction costs.

The phase also marked the consolidation of operations in competing countries like Bangladesh, Vietnam and Cambodia as "garmenting hubs" and their steady growth due to the tariff preferences accorded to them by developed economies like EU, Canada, and Australia. This preferential access also contributed to these countries "outshining" India's own performance in many garment/textile items.

Global Trade in Yarn, Fabrics and Made-ups (all fibres vis-à-vis cotton)

World textiles trade comprising Yarn, Fabrics and Made-ups (all fibres) reported a growth of 5.35%, reaching a level of USD 312.97 billion during January-December 2018, with the trade in cotton textiles growing by 4.10% and reaching a level of USD 123.01 billion. World cotton textile trade was around 40 per cent of world textile trade (all fibres) in 2018.

During this period, India exported textile products (all fibers) worth USD 18.75 billion and cotton textile products worth USD 11.48 billion. Exports of these items recorded a growth of 5.19% and 6.12% over the previous year respectively.



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Direction of Trade

A Region-wise analysis of India's export of cotton textiles to the world shows that North American region (USA/Canada) recorded the highest level of import of cotton textiles from India just about retaining its share at 25.11% in Jan-Dec 2018 from 25.98% share in Jan-Dec 2017. The region imported cotton textiles amounting to USD 2.88 billion during Jan-Dec 2018 with around 3% growth year-on-year basis.

Imports to the SAARC region are growing in value terms since the last three years. SAARC ranked second amongst the regions with imports from India amounting to USD 2.0 billion, commanding a share of 17.54% during Jan-Dec 2018 recording a y-o-y growth of 14.48%.

EU (28) ranked third amongst the regions with imports amounting to USD 1.69 billion commanding a share of 14.69%.

However exports to the region fell by (-) 8.21% during the period Jan-Dec 2018. This was followed by exports into Hong Kong China zone amounting to USD 1.24 billion, commanding a share of 10.82% during Jan-Dec 2018, recording a y-o-y growth of 15.69%.

Middle East has been the region with the highest decline rate of (-) 8.98% in the period Jan-Dec 2018 importing cotton textile worth USD 0.63 billion during this period. CIS Region had the lowest level of imports from India with a share of less than (-) 1%.

Exports of Cotton Textiles in F.Y. 2018-2019

In line with the general trends, exports of cotton textiles from India recorded a growth of 10.63 per cent in F.Y. 2018-2019 rising to a level of USD 12.40 billion from USD 11.21 billion in the previous year. Cotton Textile exports comprised a share of 55 per cent in overall export of Textiles from India.

The exports of cotton yarn increased by 14%. Correspondingly, the export of cotton fabrics and cotton made-ups in India's cotton textile export basket recorded a growth of 9% and other textile Yarn, Fabric, Madeup articles grew by 12% in F.Y. 2018-19. Raw cotton including waste recorded a growth of 11% in F.Y. 2018-19 reaching a level of US\$ 2.1 billion.

Major Destination for Exports of Cotton Textiles from India

Top 5 ranking destinations for Exports of Cotton Textiles from India included USA, Bangladesh, China, Pakistan and Vietnam. Apart from these countries Sri Lanka, Germany, South Korea, UK, Egypt, Italy, UAE, Portugal, Thailand and Peru continued to be other major destination for exports of cotton textiles from India. 75.52% of the total cotton textile exports accounting for USD 9.37 billion was exported to these top 15 countries during F.Y. 2018-19.

USA continued to be the major export destination in F.Y. 2018-19 with a share of 19.05% followed by Bangladesh and China with shares of 15.89% and 14.62% respectively.

Cotton textile exports to China ranked 3rd in India's list, growth in exports increased sharply by 75% during FY 2018-19. Similarly exports to Thailand ranked as 14th increased by 28.70% while the exports to South Korea ranked 8th grew by 18.10% during this period.



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Top destinations for Indian Cotton fabrics, madeups, etc.

USA continued to be the leading market for cotton fabrics, made-ups, etc. in 2018-19 with a share of 38.11%. Bangladesh, Sri Lanka, U.K., Germany, UAE, Senegal, South Korea, France, Canada, Italy, Australia, Spain, Nepal and Netherland were the other leading markets.

Demand for Indian cotton fabrics, made-ups etc. increased by 25% in Netherland as overall exports grew by from USD 5.48 billion in the year 2017-18 to USD 5.94 billion in the year 2018-19 recording a growth of 8.5%.

Exports to Bangladesh, Sri Lanka, UK, Senegal, South Korea, France, and Nepal grew by 12.20%, 7.80%, 10.60%, 1.50%, 14.90%, 1.40% and 49.00% respectively. However, export to Germany, UAE, Canada, Italy, Australia, and Spain declined in the year 2018-19.

Top destinations for Indian Cotton Yarn

China continued to be the major market for Cotton Yarn in 2018-19 with a share of 32.67% recording a growth of 48.20% over 2017-18. Bangladesh was another important market for cotton yarn with a share of 18.96%. Pakistan, Egypt, Vietnam, South Korea, Portugal, Peru, Sri Lanka, Colombia, Germany, Turkey, Italy, Thailand and Japan were the other leading markets.

Export of cotton yarn from India to the world grew by 13.70% in value terms reaching a level of USD 3.89 billion in F.Y. 2018-19. Exports to the top 15 countries amounted to USD 3.34 billion contributing a collective share of 86%.

Export to Vietnam recorded the highest growth rate of 72.30% during the fiscal year 2018-19 followed by Thailand with growth rate of 51.60%.

The world imported 1,258.86 million kilograms of cotton yarns from India during fiscal year 2018-19. Exports increased by 14.70% over the previous fiscal year. In quantity terms, demand from Bangladesh, Egypt, Vietnam and South Korea grew by 8.40%, 4.90%, 67.80% and 19.70% respectively whereas Pakistan recorded a decline of (-) 23.00%.

China continued to be the leading importer with an import level of 464.98 million kilograms. Exports to China increased by 47.40%. Exports to countries like Portugal, Peru, Turkey, Germany and Italy declined in quantity terms by (-) 16.50%, (-) 1.40%, (-) 45.30%, (-) 9.10% and (-) 3.20% respectively. Collectively, the top 15 importing countries imported cotton yarns upto a level of 1091.11 million kilograms in 2018-19 accounting for 87% of India's cotton yarn exports to the world.

Top destinations for Indian Cotton Fibre

Bangladesh was the leading market for Indian cotton fibre in 2018-19 with a share of 33.04% followed by China with a share of 23.98%. Pakistan, Vietnam, Indonesia, Malaysia, Taiwan, Thailand, Belgium, Italy, Germany, South Korea, Turkey, Mauritius and Bahrain were the other leading markets.

Demand for Indian cotton fibre increased by 11% as overall exports grew by from USD 1.89 billion in the year 2017-18 to USD 2.10 billion in the year 2018-19. Out of the top 15 markets,





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exports to China, Pakistan, and South Korea grew by 279.60%, 20.90%, and 47.50% respectively. However, export to rest of the 12 markets declined in the year 2018-19.

The world imported 1,143.11 million kilograms of cotton fibre from India during fiscal year 2018-19. Exports increased by 3.80% over the previous fiscal year. In quantity terms, demand from China, Pakistan and South Korea grew by 242.10%, 20.40%, and 49.20% respectively whereas, export to rest of the 12 markets recorded a decline in the year 2018-19.

Bangladesh followed by China were the leading importers with an import level of 320.50 and 282.26 million kilograms. Exports to Bangladesh and Vietnam declined in quantity terms by (-) 21.30% and (-) 12.80% respectively. Also the export to countries like Indonesia (-) 54.00%, Thailand (-) 32.10%, Germany (-) 39.10%, Italy (-) 24.30%, Turkey (-) 77.60% and Mauritius (-) 59.90%, recorded a major decline in quantity terms. Collectively, the top 10 importing countries imported cotton fibre upto a level of 1094.75 million kilograms in 2018-19 accounting for 96% of India's cotton yarn exports to the world.

New Hopes & Challenges

As the new fiscal year sets in, the key question in the first half of 2019 is the likely production levels of cotton in India. As per some estimates, the production is likely to be at 343 lakh bales, lower than the last cotton season due to lower acreage and yields.

While the official estimates from the Cotton Advisory Board (CAB) are still awaited, it is hoped that suitable pre-emptive and at the same time progressive measures will be adopted to ensure that the Indian cotton supply position is comfortable and the prices remain competitive for both domestic and overseas consumption during the coming months.

With the new Government assuming office, the Reform Agenda 2.0 should focus on turning India into an export and investment driven high growth economy. In this context, a big push on at least three fronts is needed in order to enhance the sector's true potential in the export sector.

At present, as pointed out by the experts, the three key engines of the economy which are witnessing a slowdown are viz. private investment, consumption and exports. These issues need to be resolved by addressing problems relating to tight real interest rates and liquidity concerns.

Apart from this we should also quickly move in to exploit the opportunities brought by the trade escalations between USA and China, to boost India's competitiveness. Being the third largest exporter of textiles and with the largest exporter vacating space, India needs to go all out to position itself strategically to benefit from the arising opportunities.

Benefiting from 'The China Factor'

China continues to be the largest market for export of cotton yarn (32% share) from India and the second largest market for exports of cotton fibre with a share of 20% share. No wonder, cotton textiles remain amongst the major items in India's export basket to China. During the period April 2018 and February 2019 exports of cotton textiles increased by 69% as compared with the same period in 2017-2018 contributing in a small way to reducing the trade deficit between the two countries.



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TEXPROCIL is trying to push the exports of fabrics and made ups also which currently suffer from high levels of tariffs. With China seemingly vacating the lower end of textile production, India can make a good beginning by targeting the market for these segments. It is strongly believed that higher trade levels will bring in its wake higher levels of investments to India, especially in the weaving and processing sectors.

US-China Trade Tensions

The US has imposed an additional 25 percent duty on products from China imported into the United States on a trade value of US \$ 200 billion. These products also include 1811 tariff lines covering HS Chapters 50-60 for textile and textile articles.

TEXPROCIL has undertaken a quick analysis of the items in HS Chapter 52 (under the purview of the Council). The analysis reveals that India can benefit, if steps are taken to increase our share of cotton textile exports to the USA.

For instance, the Council's analysis of the import data of top 25 HS lines of Cotton Fabrics (under HS chapter 52) shows that imports of these items into USA from all sources in the year 2018-19 was valued at US\$ 737.85 million; out of which imports from China was US\$ 225.8 million and from India was US\$ 72.94 million.

Within the basket of cotton textiles being imported in to USA, top 5 types of fabric viz. Printed fabrics, Denim fabrics of cotton / mmf blend, Grey fabrics, Dyed / yarn dyed fabrics and Twill bottom weight fabrics offer a huge scope to increase exports.

Indian textiles can achieve growth...!

India needs to realise its full potential by making all out efforts to increase its annualised export growth rate to at least 10% on a sustained basis on the back of an enabling policy ecosystem. Hence the textile industry, with its significant contribution to the economy, merits adequate attention by the Government.

The sector has all the potential to create substantial employment opportunities especially in the rural areas and for women. Given an enabling environment and adequate policy support from the Government, the textile sector is well endowed to achieve the national goals towards increasing employment opportunities and the ambitious vision of doubling the exports.

Considering that the textile industry operates on a low margin, time bound stimulus packages can help in overcoming the challenges of rising costs by enhancing competitiveness in the short term. While stimulus packages are a great help, the industry stakeholders, on their part, must also realise that it is also their responsibility to sustain their presence in the market place, by taking positive steps towards building an efficient and cost competitive textile value chain. As stakeholders, we also need to reinforce our focus on brand building and strengthening our capacity for innovation.

Trends in world trade indicate that India needs to invest in producing value-added products and at the same time, India needs to diversify its export basket of consumables like fabrics & yarns to manufacture new products in the technical textiles sector.





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This strategy has been successfully adopted by China which although seems to be moving away from production of traditional items but is reinforcing it's presence in high value segments of textiles by improving it's dyeing and printing capabilities and also producing technical textiles.

In conclusion, the reform measures undertaken in 2018-19 are expected to strengthen and reinforce the growth momentum. At the same time the prospects for Indian economy for the year 2019-20, need to be assessed in the light of emerging global and domestic developments.

While the global economy faces uncertainties due to the emerging trade tensions, the key challenge before all of us is to stimulate investment activity and generate gainful employment on the edifice of robust export growth.





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India ITME Society - An Odyssey of Commitment, Trust & Quality



Seema Srivastava
Executive Director,
India ITME Society

Born out of necessity, nurtured with perseverance, India ITME Society has evolved as a catalyst and initiator of change, influencing Textile Engineering and Textile industry beyond geographical borders of its country of origin. India ITME Society has slowly and steadily worked towards fulfilling its vision and has strived to adapt to aspirations of new generation.

India as a nation today is transformation in progress and is driven by aspirations of ambitious, spirited next gen. To adapt and align to this new Socio-Economic expectations, Society too has reinvented its focus on community partnership, local involvement, philanthropy and volunteerism to ensure full circle of inclusiveness.

Shortly, India ITME Society is all set to unveil re-vitalised interactive program to further connect:

- **Opportunity to aspiration,**
- **Entrepreneurship**
- **Students to industry**
- **Women Empowerment**
- **Information to Masses**
- **Need to Facilitation**

Connecting Business and Opportunities: Inn zone

In its efforts to optimize opportunities for meeting, interacting, exploring new customers, products prices for its members and exhibitors, India ITME Society has initiated India ITME Networking Zone (IIN Zone), a unique platform exclusively for Textile and Textile Engineering Industry. This is a free of cost initiative for the Textile Industry, Textile Engineering Industry to list and promote their products and brand worldwide. This platform is visible around the globe, easily accessible and promoted to companies, industry buyers, Government bodies and Associations worldwide.

Women Entrepreneurship

To encourage women to explore their potential in business, creative talents, Society shall unveil new programs and platform shortly. This can be utilised by spirited and aspiring women and youth across the globe. Student corner, Investment and Trade board, E-Library to access latest technology and discussion topic etc all have been developed keeping in mind future requirements to create and consolidate single window for textile and Textile engineering Industry. Today, with all the above activities, Society is much more than just business, trade and exhibitions. India ITME Society has expanded its sphere of influence and metamorphosed into an integral cog in the wheel of time, disseminating knowledge, creating opportunities, encouraging new ventures, exploring new business frontiers, thus strengthening future of textile industry, not only in India but also across the globe. Altruistic service to the Industry remains the core purpose of India ITME Society and shall continue to be so...



Catapulting Indian Textile & Textile Engineering Industry into Global Arena



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India's Top 10 Exhibition Organisers



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India ITME - Trusted Name for Quality & Excellence



Ketan Sanghvi
Hon. Treasurer,
India ITME Society

The Laxmi Group of Companies, currently based in Ahmedabad, started off with Laxmi Textile Stores, being founded in 1948 by Shri MB Shanghvi and his 3 sons. The initial activity was trading in spares for textile machinery, which then moved in the early 1960s to manufacturing of spinning machinery products such as traverse wheel grinders, bare cylinder grinders & Phillipson rollers and subsequently to the manufacture of dobbies, with the establishment of a foundry.

Around 1977, the company manufactured the first set of semi-automatic shuttle looms and commenced trial production of fabric for Bharat Vijay Mills.

The first exhibition organized by India ITME Society in Bandra Reclamation in 1980 offered a unique opportunity to the company to showcase their working semi-automatic dropbox loom to the world.

This participation came in immensely useful when the textile industry migrated from the organized sector to the decentralized sectors like Bhiwandi, Surat & Bhilwara after the textile strike of 1982. Those prospective customers who had seen the machine during the first ITME show, now stepped in with orders, helping the company establish a beachhead in these markets.

The quest for improvement and quality led the elders to Japan, where a tie-up with Miyamae Technical Center of Kanazawa was soon finalized in 1986. The infusion of technical ideas from M/s Miyamae allowed Laxmi Textile Stores to make significant improvements in quality and performance.

The entry of the younger generation of Shanghvis infused a new energy into the company. Exports of looms to neighbouring countries like Sri Lanka, Nepal, Bangladesh, Indonesia and some other countries have also played a significant role in the growth of the company

2002 marked the entry of the company into the rapier looms market and the first lots of rapier looms were delivered to customers in Bhiwandi & Karur. This model was developed under assistance from ATIRA and helped the company establish customers all over the country.

Rapier loom production was spun off to a separate company, Laxmi Shuttleless Looms Pvt Ltd in 2004 with production facilities based in Ranip and with several subsequent models and upgrades being introduced.

The foundry has also gone through an upgradation with several new machines being installed and the production focus shifting from in-house captive production to the production of CI castings for many reputed manufacturers.

Participation in subsequent ITME exhibitions has always helped the company showcase their newer models of rapier as well as shuttle looms, with ITME 2016 and GTTES 2019 being the latest expo.

Laxmi Textile Stores and its sister concerns Laxmi Shuttleless Looms Pvt Ltd look forward to participating in ITME 2020 as well as in ITME Africa 2020.



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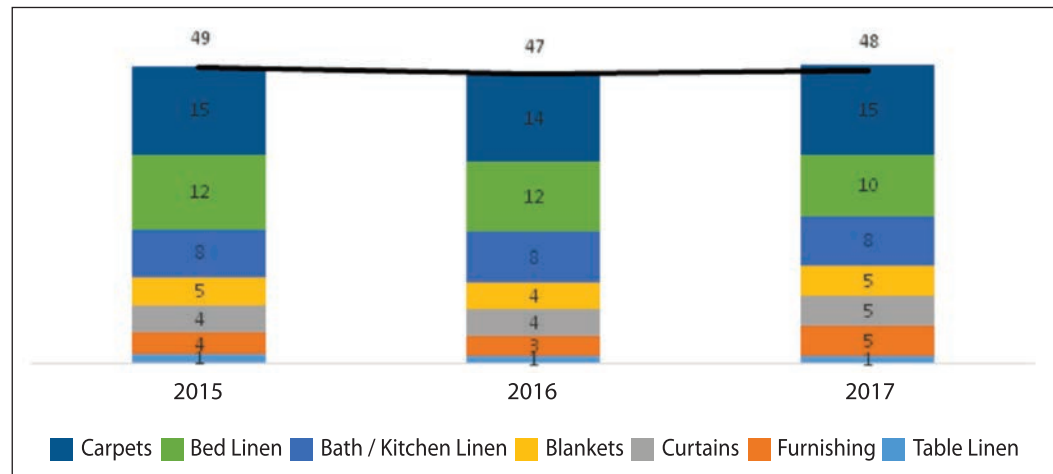
Home Textiles: The Evolving Landscape



Updeep Singh Chatrath
Dy. Chief Executive Officer
Sutlej Textile and Industries Ltd.

Home textiles is one of the major segments of the textile industry comprising of wide range of categories including furnishing fabric, curtains, bed linen, carpets, bath linen and other home furnishings. The global trade of home textiles was worth US\$ 48 Billion in 2017, accounting for 6% of the total textile and apparel trade of US\$ 764 billion.

Figure 1: Historical growth of global home textiles trade (Values in US\$ Bn.)



Source: UN Comtrade & Wazir Analysis

Over last 3 years, the trade of home textiles has gone down from US\$ 49 billion in 2015 to US\$ 48 billion in 2017. The category that has seen a dip in exports is bed linen.

EU & USA are the major importing nations for home textiles with a share of 36% and 24% respectively. On the supply side, China dominates the global trade of home textiles with a share of 39% followed by India at 11%.

Figure 2: Top Markets of Home Textiles (2017)

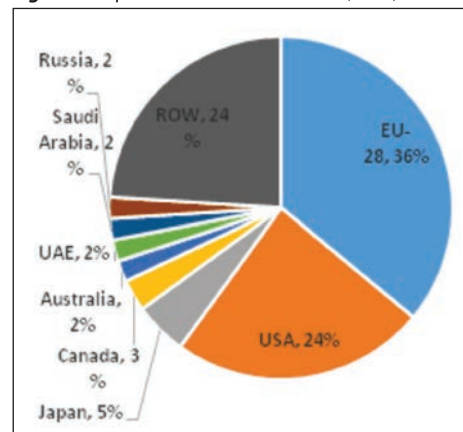
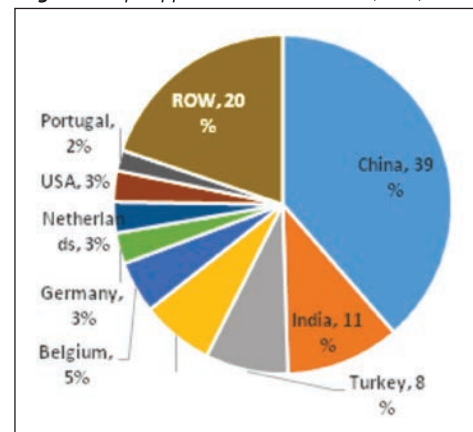


Figure 3: Top Suppliers for Home Textiles (2017)



Data Source: UN Comtrade Database

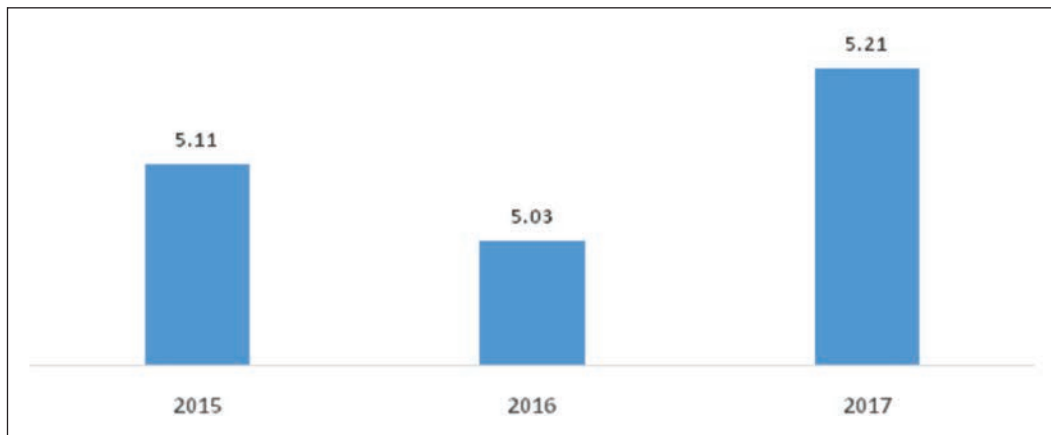


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Home Textile Sector in India

India over the last few years has consolidated its position as the second largest exporter of Home textiles in the World, only behind China. India's export of home textile stood at a value of US\$ 5.21 Bn. in 2017 growing at a CAGR of 1% from 2015. India today accounts for 11% of the total trade of home textiles.

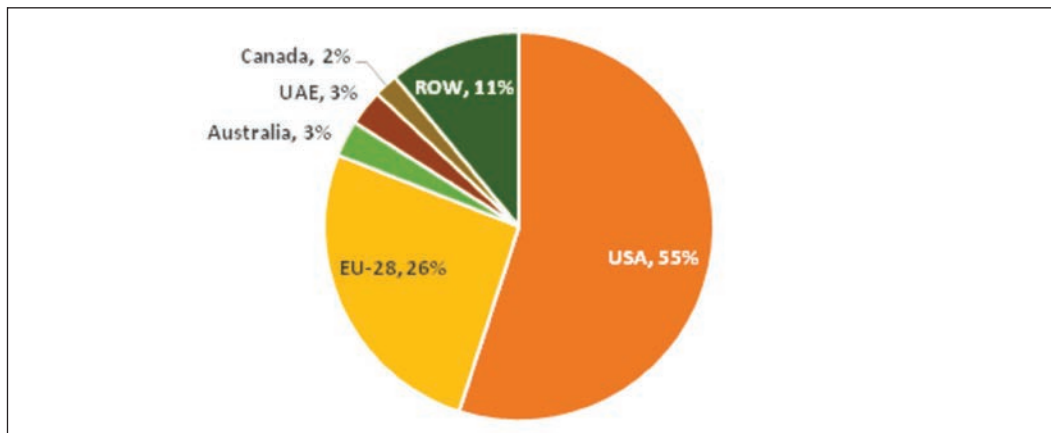
Figure 4: India's exports of home textiles (Values in US\$ billion)



Data Source: UN Comtrade

India has traditionally exported home textiles primarily to EU and USA, which constitute around 81% of India's home textiles exports among them. India has a dominating presence in USA, with a market share of close to 25%. India also has a significant share in home textile imports of Australia and UAE.

Figure 5: Major Markets in Home Textiles (2017)



Data Source: UN Comtrade & Wazir Analysis

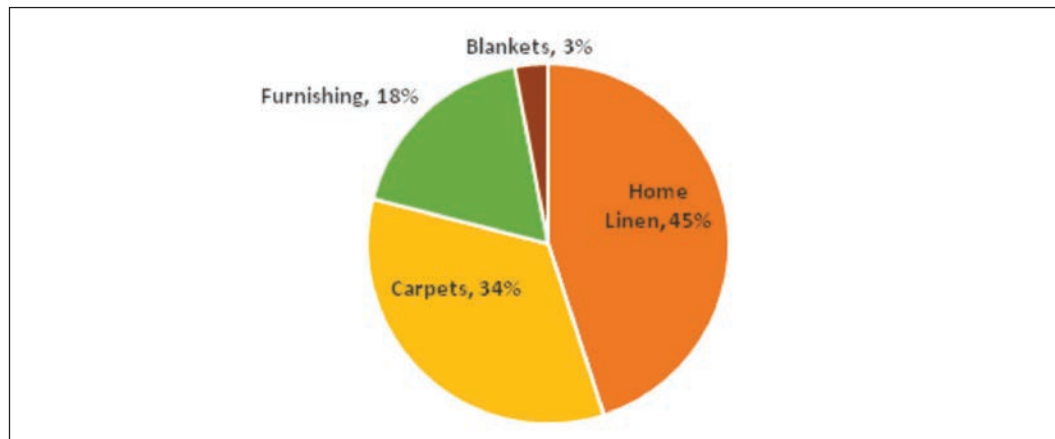


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Figure 6: Major exported segments of India's home textiles (2017)

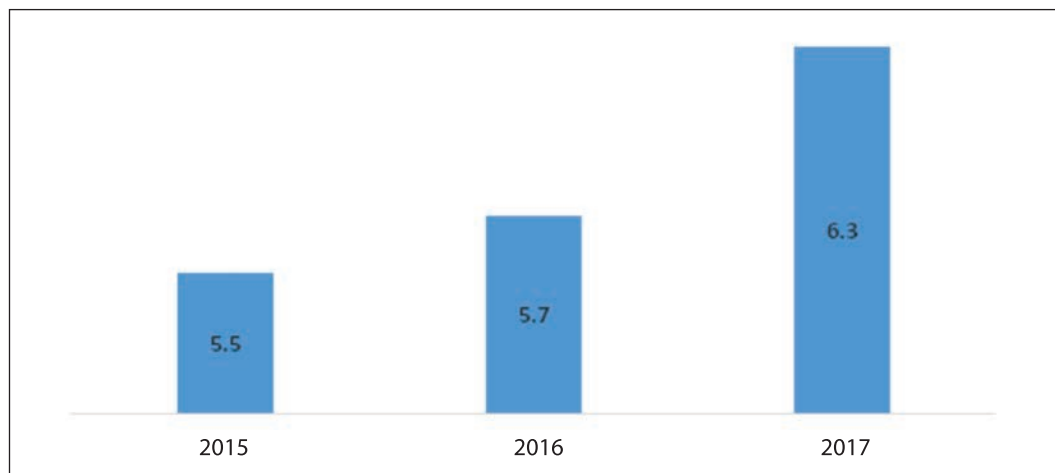


Data Source: UN Comtrade & Wazir Analysis

Home linen is the largest exported commodity from India with a share of 45% followed by carpets with a share of 34% and furnishings with a share of 18%.

India is not only one of the biggest supplier but also one of the largest consumers of home textiles. The domestic consumption for home textiles stood at a value of US\$ 6.3 Bn. in 2017 and is expected to reach US\$ 15 bn by 2025.

Figure 7: Domestic Market of Home Textiles in India (In US\$ Bn.)



Source: Wazir Analysis

Key Trends Driving Growth

Increasing demand of household products and growing consumer awareness have made home





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textiles a lucrative business segment in the global textile industry. Various growth drivers are pushing this demand for domestic as well as exports markets are given below:

a. Domestic Market

One of the key factors driving the growth of home textiles segments is that changing consumer behavior and growing disposable income. Home fashion has become a separate segment as consumer consciousness towards high quality living has increased. To cater to the increased demand, the number of retailers entering the home textiles market is also increasing. From IKEA to H&M Home, big brands are entering the thriving market to tap the big opportunity and take advantage of the prevailing environment.

The Hospitality Sector is one of the major sectors which have a huge demand for soft furnishings. New hotel rooms additions in Tier 1 & Tier 2 cities in India are increasing exponentially.

Hotels are putting extra emphasis on interiors and quality of the stay of its customers, resulting in the demand for unique custom designed furnishing solutions. In coming times, this will be a vast market which is currently untapped mostly.

Additionally the growth of healthcare infrastructure (hospitals, nursery, home, clinics, etc.) will lead to increased demand for home textile products, specifically specialty products like anti-bacterial bed linen, flame retardant fabrics, etc.

Fuelling the market growth, research and development in the home textiles segment has been immense. Modern lifestyle involves a lot of stress and sleep deprivation, and thus innovation in sleep technology and finishes such as microbial, anti-mist, herbal, etc., are the future of home textiles

b. Exports Market

China has dominated the global home textiles trade scenario in last 2 decades with a share in the range of ~ 40% by successfully leveraging its large human resource base, low manufacturing costs and large scale infrastructure. However, their share in global trade is expected to come down because of increasing attraction of China's domestic market and rising labour cost. Moreover, it is noteworthy to mention that trade war between China and USA will also result in decline home textiles exports from China to the US.

Hence, there is a golden opportunity for the Indian manufacturers to tap the market as it is recognized as a leading supplier of home textiles products globally.

Way Forward

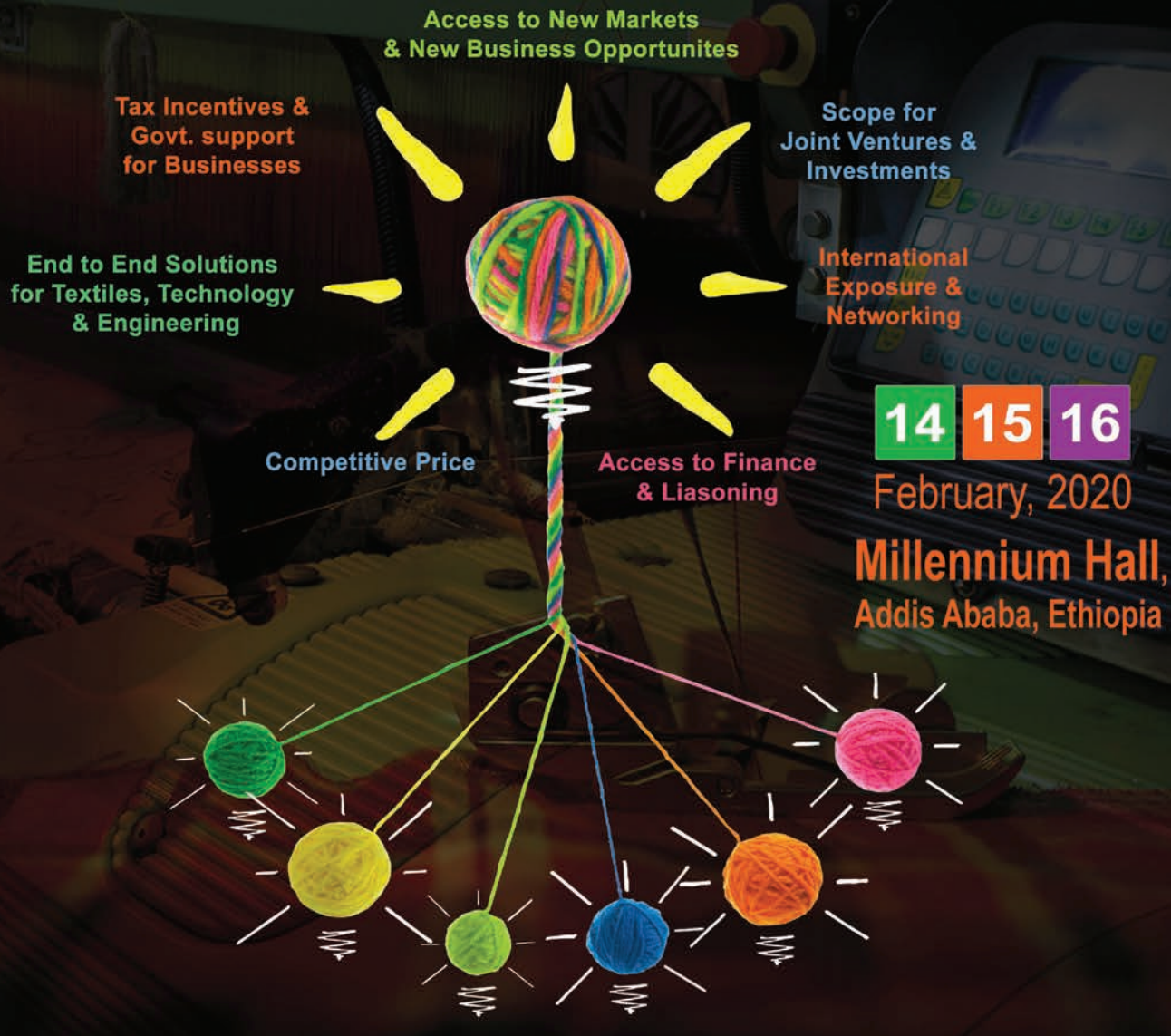
The demand for home textiles product is expected to increase globally as well as in India. In order to cater to the increasing demand and survive in the market it has become very important for the companies to focus on product development and value added service to global buyers.

Focus on skilling at all levels will also play an important role. Initiatives on Sustainability and Circularity shall be a lucrative proposal to the major importing Nations like Europe and USA.





PROSPERITY FOR AFRICA THROUGH TEXTILE TECHNOLOGY



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Indian Textile Engineering Industry



Mehul Trivedi
 Chairman, TMMA

The Textile Engineering Industry (TEI) in India is one of the five key sectors of the capital goods industry. It has been the cornerstone of the Indian Textile Industry during its development spanning over the last 75 years. It created a strong engineering base capable of manufacturing almost the entire range of machinery for main three sectors of the textile industry, viz spinning, weaving and processing.

The TEI produces entire range of textile machinery including the state-of-the-art technology machines mostly under technical and financial collaborations with renowned manufacturers from Europe, U.K., Japan, etc. The industry is exporting approx. 35% of its production to more than 50 countries of the world. The Indian TEI consists of above 1900 machinery and components manufacturing units with 1000 units producing complete machinery, and the remaining, parts and accessories producers.

The TEI profile is as under:

- The investment in the industry is in the range of Rs. 9,500 crores with an installed capacity of Rs. 11,000 crores
- Production Rs. 6,775 Crores approx
- Export is about Rs. 4,000 Crores
- More than 80% of the units are SMEs
- Provides direct / indirect employment to > 285,000 people
- Meets 45-50% of the demand of the Indian textile industry on an average

The vision of Indian Textile Engineering Industry is:

- A strong TEI that can grow, compete, and export
- Provide strong support to the Indian textile industry to make it vibrant, and competitive
- Acquire technological strength in all sectors, as we already have in spinning
- Meet 70-75% of the demand of Indian textile industry for high tech machinery, from the current position of 45-50%
- Capacity scale-up commensurate with increased demand
- India to become a manufacturing hub for textile machinery, parts/components and accessories, contributing further to employment generation & GDP

On TMMA:

The Textile Machinery Manufacturers' Association (India) (TMMA) has been playing a significant role in the progress of the Indian Textile Engineering Industry. TMMA covers membership of almost 80 – 85% of the production capacity of the organised sector of TEI. Under its aegis the Textile Engineering Industry (TEI) has grown steadily and remarkably in producing a wide range of quality textile machinery, parts and accessories. The TMMA is recognized as one of the premier trade bodies of India and it is consulted by the Government of India at various stages on its policy making etc. and other organizations concerned on all matters pertaining to the development of the TEI.



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ITAMMA working towards making Indian Textile Industry a World Leader



Jugal Kishore Pansari
President, ITAMMA

The Global Market size of Textile Mills is expected to grow to \$ 842.6 billion by 2020 while the Global Apparel Market size is forecast to reach \$970.9 billion by 2020, where India would be the highest growth market globally at 8.7 % to be the third largest after China & USA. At the same time the Global Textile Machinery market was valued at \$ 35510 million in 2018, growing at a CAGR of 5.71% between 2018 and 2023, where Asian region to account a 90% of market share.

The Indian textile industry has ancient roots and has been a global leader for centuries, which attracted the British and others to our shores. Indian textile industry has the potential to grow its global market share by exploiting its own strengths of innovative skills, cultural heritage in design, large domestic production and market base and lower costs.

As the industry moves more into innovative, value-added products, the demands on the machinery and spares manufacturers for quality, innovation, on-time service, turnkey solutions, R&D are increasing rapidly. In order to play a meaningful role in the future of the textile industry, the textile engineering industry has to (i) adopt best practices in manufacturing to become competitive in terms of cost and quality, (ii) undertake R&D to develop new products to meet ever-changing demands of users, (iii) partner with user-industry to assist them in developing innovative products for their markets and (iv) to improve their cost competitiveness, adopt ethical business practices to conform to the increasing stringent regulations of international markets and MNC clients.

The government policies now rightly focus on value added sectors such as garmenting, made-ups, finishing, knitting and weaving, besides technical textiles, as opposed to more focus on fibre and spinning in the past. Spinning mills are increasing looking at going up the value chain and becoming composite units. Implementation of GST, though causing some disruption in the short term, will help the consolidation, growth and competitiveness of the textile industry across the value chain.

The targets set cannot be achieved overnight and needs a strong base of manufacturing infrastructure equipped with high-tech technologies like Smart manufacturing, Digitalization, Intelligent manufacturing, Industry 4.0, etc, to deliver a state-of-the art Sustainable Products. Accordingly we at ITAMMA had already revamped our role of being only facilitator, and now Partnering proactively with our Members in technological developments and Business growth.

'INDIAN TEXTILE ACCESSORIES & MACHINERY MANUFACTURERS' ASSOCIATION' (ITAMMA) now celebrating its Platinum Jubilee Year and whose foundation was laid in the pre-independence era, has an illustrious history of the serving the nation and the textile industry by furthering the cause of development of technology, supply of latest machinery, parts and services and promoting exports.

ITAMMA at present has more than 400 members, with many Associations & Chambers of Commerce in India as affiliated Satellite/ inter alia members and is Accredited by NABET with "DIAMOND Grade" at "National level" and have been awarded the most prestigious Award for Responsible Indian BMOs under the category of 'Environment Responsibility'.



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Association Office is set-up in the Heritage building in the heart of Metro City, supported by a well furnished Banquet Hall & Conference Room equipped with Video-conference facilities and a modern Library; extended with the Liaison offices at Ahmedabad & Coimbatore for reaching its services to the main clusters of the Indian Textile Engineering Industry.

ITAMMA regularly participates in Textile machinery exhibitions in India and abroad, being invited as a Supporting Associations at ITMA, ITM, DTG, VTG, Indo Intertex, ITMA-Asia, Irtantex, etc. to showcase the technology, capability, product range and international presence of the Indian TEI and also organizes Networking Dinners for closer interaction between members and senior executives and entrepreneurs from the user industry.

ITAMMA is one of the founder member of India ITME Society that organizes the world famous ITME Exhibitions in India since 4 decades. To encourage our members in Exports we offer "Export Excellence Awards."

ITAMMA is providing support and guidance to our members for adoption of the best practices in manufacturing, such as 5S, LEAN Management, Industry 4.0, Yellow & Green belt certification, TPM, ZERO DEFECT ZERO EFFECT (ZED certification) through seminars, workshops, LEAN Clusters, expert deputation, etc. involving our Industry Experts registered on 'ITAMMA-Expert Panel.' Further promoting Contract Research by creating an R&D platform to our members through our Mou Partners viz.

Textile Research Associations, Universities, Colleges, etc. in 4 Countries & 27 institutions at PAN India, clubbed with visits to state-of-the-art factories.

To promote the concept of innovation ecosystem, ITAMMA took the initiative to organize Workshops on **"Creating an Eco-system for innovations & technology development in Textile industry"** at various important Textile Clusters which received overwhelming response, active participation and valuable suggestions from the Mills, Machinery and parts manufacturers, Consultants, Academicians & Govt. bodies.

We will continue this initiative in other parts of the country and compile a report that will be presented to Industry Ministry (DHI), Textile Ministry, NITI Aayog, CITI, etc. for implementation.

The government policies now rightly focused and so the Government Schemes of "Make in India," "Skill India," and "Start Up India" were addressed effectively during these workshops.

ITAMMA launched its **ITAMMA Expert Panel** having 78 Industry experts in the fields of Textiles, Metallurgy, Ergonomics, Rapid prototyping and 3D printing, Mechatronics and Low Cost Automation, Product Design, etc. on this Panel.

Considering today's era of Smart & Digital Manufacturing followed by Responsible Manufacturing, being the mantra of sustainable growth in the Global Challenging Market, we have focused our activities further supported by 5S, Lean, Product Design Projects, Operational Excellence, etc.

We have seen the tremendous development in Technologies in the field of Pneumatics, Hydraulics, Electronics, and Computerization, etc and are also experiencing the implementation of all these technologies in the indigenously manufactured machines and accessories.



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To encourage our members in these areas we have also introduced "Make in India Award for Excellence" and "Operational Excellence Award."

Further to create an awareness of these technologies among our members we have brought our print publication **ITAMMA Voice magazine**, with the themes of "Operational Excellence" on topics like Lean, ZED, Industry 4.0 Manufacturing, Digital & Smart Manufacturing, Innovation, Kaizen, KATA, 5S; "Going Green," addressing the Pollution control issues and responsible manufacturing processes and procedures;" Brand India" conveying the message and benefits of 'Make in India' and the latest issue on "Next Generation Manufacturing," address mainly the course of transformation of ITAMMA in its services and activities for the growth of Indian Textile Engineering Industry "Towards Making Indian Textile Industry A World Leader."

We have been supporting ITMA since last four decades and are also participating in ITMA'2019, Barcelona, Spain with our 74 member exhibitors. ITMA Exhibitions being the trendsetting textile and garment technology platform, many of our Members have got an opportunity to explore fresh ideas, effective solutions and collaborative partnerships for business growth, during past ITMA exhibitions.

I am proud to announce that ITAMMA will be celebrating its Legacy of 75 Years during ITMA'2019 by recording 74 - ITAMMA Member Exhibitors.

We on behalf of ITAMMA and our Members thank the organizers of ITMA for providing the above facilities and activities to ITAMMA and its Members and convey our best wishes for the Grand success of ITMA'2019 to be held in Barcelona from 20-26th June'2019.

The Youth Wing of ITAMMA do not fight for a revolution but heralds its members towards a technological evolution, bench marking- "ITAMMA's Legacy of 75 Years continue with the next generation".





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India to Lead in MMF Textiles Trade Globally



Ronak Rughani
Chairman, SRTEPC

India has gradually become a significant player in the global textile economy both as a consumer and as a producer of textiles. Currently, we are just after China in exports of Textiles and Clothing globally. The synergistic efforts of all the stakeholders including Government has resulted in the industry growth rate of 8-9% during the last 2-3 years as compared to 3-4% during the last six decades since independence. However, there is slowdown in the growth during the current year but industry has the capability and resilience to overcome this temporary phase of global economic recession and emerge stronger.

Man-Made Fibre Textiles Industry to be in the Fore

Man-made fibres dominate global textile fibre consumption with over 70% share and the share of Natural fibre is only 30%. The Textiles Intelligence Report on Forecasts of regional and global end use demand for man-made fibres is expected to increase by 3.4% in 2017 whereas end use demand for cotton is expected to increase by only 0.5%. As a result of these trends, the share of man-made fibres in global end use demand will grow from 72.5% to 73.0% but the share of cotton will fall to 25.7% of which most of the overall growth will take place in developing countries, and most of this growth will be in Asia.

Forecasts 2025

Global end use demand for textile fibres is forecast to expand by an average of 2.8% per annum between 2015 and 2025, from 90.1 mn tons to 119.2 mn tons and global end use demand for man-made fibres is expected to increase by 3.7% in 2025.

Global end use demand for Textile Fibres, 2010-25(mn tons)

					Annual average % change	
	2010	2015	2020	2025	2015-20	2020-25
Cotton	25.1	24.3	24.4	24.9	0.1	0.4
Non-cotton	48.2	65.8	78.8	94.3	3.7	3.7
Total	73.3	90.1	103.2	119.2	2.8	2.9

Source: International Cotton Advisory Committee (ICAC)

India's Strong Domestic Foundation

The Indian domestic textiles and apparel market is one of the fastest growing market in the world. The most important growth driver is the robust economic growth that has been witnessed in the country. India's GDP has been growing at a rate of around 6% since the liberalization of economy in 1991 and has grown over by 7% in the past few years. India's GDP would increase from US\$ 2651 bn. to US\$ 3500 bn. by 2023. Currently, India is the 7th largest economy in the world in absolute terms and is expected to overtake most of the European nations in the next 15 to 20 years. It is predicted that India will eventually become world's 1st to 3rd largest economy by 2050.



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Indian Manmade Fibre Textile Industry

Indian Manmade fibre (MMF) textile industry is vibrant and growing. Today, India produces almost all the types of synthetic fibres, be it polyester, viscose, nylon or acrylic and hence we are at the advantage compared to any other nations across the world. Currently, we are the 2nd largest producer of both polyester and viscose globally.

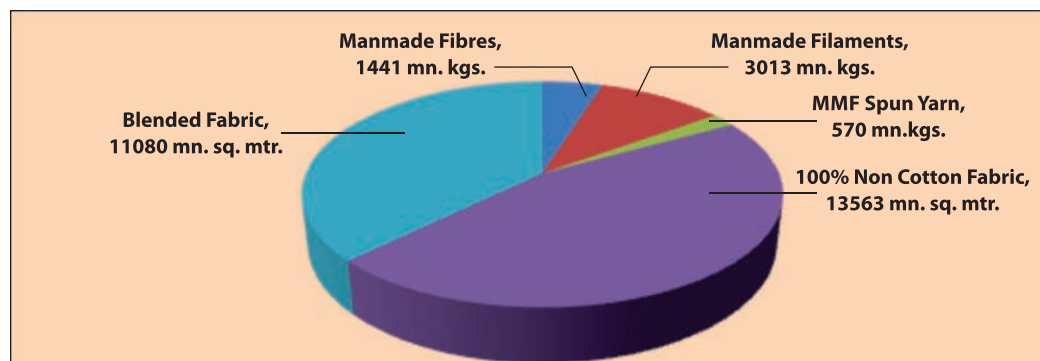
MMF textile industry in India is self reliant across the value chain right from raw materials to the garmenting. Our fabrics are international standard and known for their excellent workmanship, colours, comforts, durability and other technical properties. Due to heavy investments in world-class manufacturing plants, continuous innovation, untiring entrepreneurship, new product mix and strategic market expansion, India is soon going to cloth the entire world and set to take centre stage in the global arena.

Production of Manmade Fibre (MMF) Textiles (Year 2017-18)

India is the second largest producer of man-made fibres (MMF) in the world with presence of large plants having state-of-the art technology. Presently India produces over 1441 million kg of man-made fibres and over 3000 million kg of man-made filaments. Over 23000 million sq. mtr. of fabrics were produced from Man-made fibres and their blends. Most of the Man-made fibres are currently produced in India. India is 2nd largest producer of polyester and viscose in the world. Major varieties are polyester, viscose, acrylic and polypropylene.

Products	Unit	2017-18*
Manmade Fibres	Mn. kg	1441
Manmade Filament Yarns	Mn. kg	3013
MMF Spun Yarn	Mn. kg	570
100% Non Cotton Fabric	Mn. sq. mtr.	13563
Blended Fabric	Mn. sq. mtr.	11080

*Source: Office of the Textile Commissioner and Industry, * Provisional*



Textile Vision of our Government is to achieve US\$ 350 billion by 2024-25.



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Growing Exports of Indian MMF Textiles



Source: DGCI&S

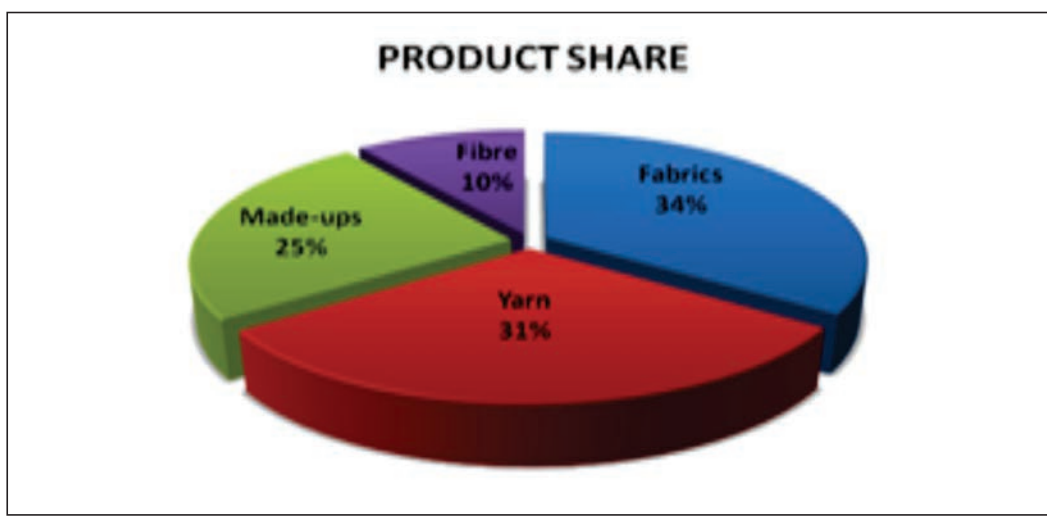
Currently, exports of Indian MMF textiles are around US\$ 6 bn. accounting for around 30% in India's textiles exports which was US\$ 20.03 bn. (in 2017-18). Exports of Indian MMF textiles witnessed consistent growth till 2014-15.

However, due to global financial crisis and consequent uncertainties that had prevailed in 2015, exports of man-made fibre textiles from India had also been impacted witnessing a decline of around 9%.

Although, the 2015's crisis had greatly accelerated, Indian man-made fibre textiles exports could sustain a positive growth of 1% in 2016-17.

Product Share

During 2017-18, exports of Fabrics dominated in the total exports of MMF textiles with 34% share, followed by Yarn 31%, Made-ups 25% and Fibre 10%.



Leading Markets (US\$ million)



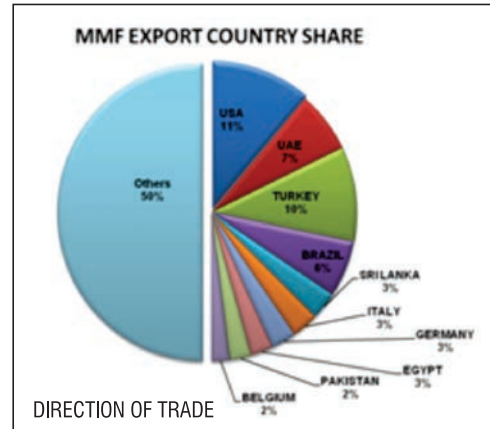


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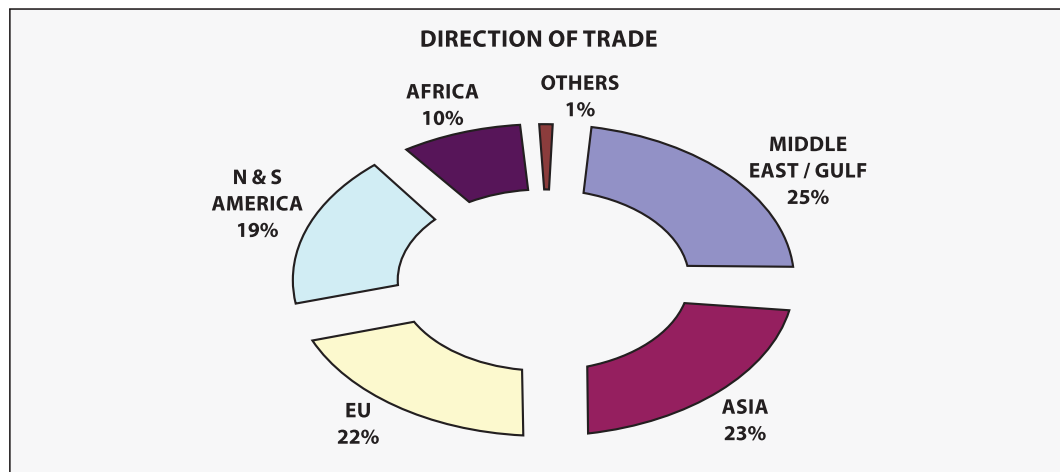
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Sr. No.	Markets	2017-18
1	USA	627.76
2	TURKEY	576.21
3	UAE	377.45
4	BRAZIL	348.09
5	SRI LANKA	170.45
6	ITALY	166.08
7	GERMANY	156.43
8	EGYPT	140.10
9	PAKISTAN	135.79
10	BELGIUM	113.12



Gulf Cooperation Council (GCC/ Middle-east) region is the largest trade block for Indian Man-made fibre Textile exports with a share of 25%, whereas other Asian countries with 23% share is the second largest export destination. Export shares of the highly sophisticated and quality conscious European Union and North & South America are 22% and 19% respectively. 10% of exports went to African region and share of other countries was 1%.



Indian MMF textiles were exported to around 150 countries during 2017-18.

The key advantages of Indian MMF Textile Industry

India offers the entire range of textile products including polyester, rayon, nylon, acrylic and blended textile items to discerning international buyers. India produces all the fibres, yarns, fabrics and made-ups today. We have global leading players in polyester, viscose, home textiles, etc. Majority of the fabrics used for uniforms in the EU and America are manufactured in India. India boasts of nearly self sufficient raw material production base and produces a wide range of textiles. We have dedicated and generations of textile entrepreneurs of designers and experts in step with the modern trends, are constantly at work creating new effects, finishes and designs to give better textiles to the world. Production facilities are available across the textile value chain, from spinning to garments manufacturing. The industry is investing massively in technology and



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capacity expansion. Large Indian players such as Reliance Industries, Arvind Mills, Welspun India, Grasim and Raymonds have established themselves as 'quality producers' in the global market. Apart from quality the prices are best competitive.

And delivery is on the dot. What is more, India is able to supply both high and low-end textile items either in small quantity or large volume. Moreover, the secret of India's success lies in the un-mistakeable quality of its textiles, competitive prices and reliable supply. So, whatever your requirements, India is the right source of supply.

Promotion of Export of MMF and Blended textiles from India

The Synthetic and Rayon Textiles Export Promotion Council (SRTEPC) is the nodal organisation responsible for proportion of export of Manmade Fibre (MMF) Textiles from India. SRTEPC was set up under the guidance of the Ministry of Textiles, Government of India in 1954.

All the Export Promotional hand holding activities and services pertaining to Manmade fibre and blended textiles are being offered by SRTEPC both to Indian and overseas companies. Its Head office is in Mumbai.

Service to Overseas Buyers

The SRTEPC renders a variety of services to the overseas buyers on request free of cost. Just for the asking. And they can count on the experience and expertise of the SRTEPC. Some of the important services rendered by the Council include the following:

- Introduces the overseas buyers to the right manufacturers
- Provides them with accurate and up-to-date product information
- Keeps them abreast of the latest developments on the Indian synthetic and rayon textiles scene
- Organises Exhibitions, Buyer Seller Meets
- Circulates the trade enquiries
- Assists in arranging travel and stay in India for business visits
- Attends to Buyers' complaints, and in case of trade disputes, assists to bring about amicable settlement

Link to the Government

The SRTEPC represents the entire exporting community of synthetic and rayon textiles and is always alert and aware of the grievances relating to the export activity. Being in a nodal position of knowing the genuine problems of exporters at the policy and procedural levels, the Council represents them to the Government for remedial intervention to create an enabling milieu for the exporters.

CONCLUSION

With massive production base and growing exports in manmade fibre and MMF based textiles India is one of the undisputed leaders globally. Today Indian textile industry has changed drastically with all set of modern state-of art technology producing and exporting some of the





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finest quality blended fabrics, pure MMF fabrics and finest MMF Yarns. The Indian MMF fabrics and yarns are exported to quality conscious European and American Buyers. As mentioned above, we have domestic base for the basic raw materials being the 2nd leading producer of manmade fibres, especially polyester fibre and cellulosic fibre.

India is ready to cater to all kinds of textile needs of the discerning international buyers. To showcase the varieties of textile possibilities and innovations in MMF textiles segment, the SRTEPC as the nodal agency in the MMF textile area, is organising 4th Edition of the India's biggest MMF textiles Exhibition known as "Source India 2019" from 21 to 23rd August, 2019 in Mumbai.

We are expecting to host about 150-200 leading international textile buyers with required complementary hospitalities to this Event in Mumbai. I would like to cordially welcome any leading importer from Europe or any other parts of the world may like to visit this Event and witness whole new experience in textiles.



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Access to
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Africa offers a huge opportunity for the Textile & Clothing Industry based on its rich heritage of textiles and the strong economic indicators. It has the potential to become the new Apparel Hub of the world.

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