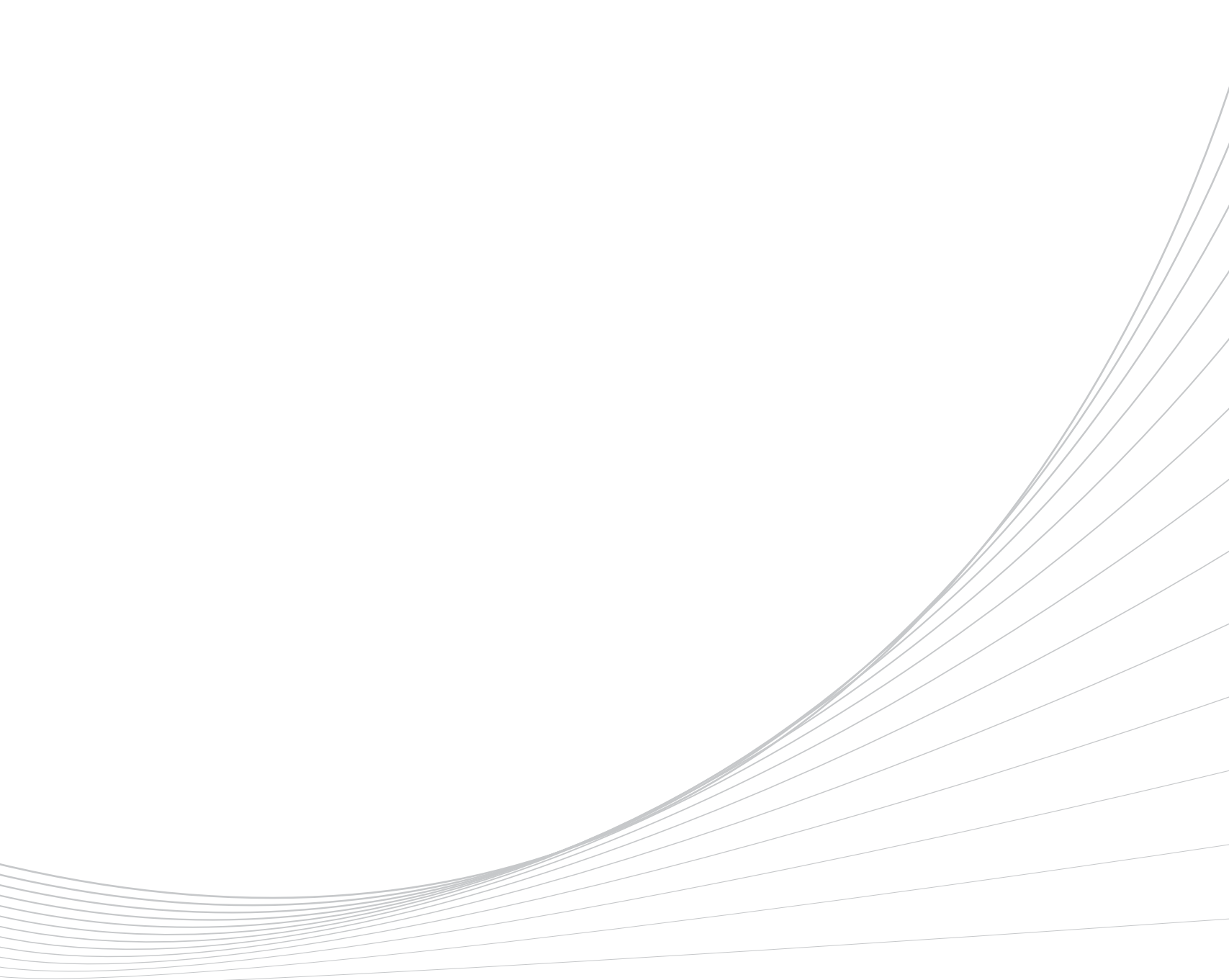


Indian Textile & Apparel Compendium 2010

technopak





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- India's Textile & Apparel industry (domestic + exports) is expected to grow from the current Rs 3,27,000 crores (US\$ 70 Bn) to Rs 10,32,000 crores (US\$ 220 Bn) by 2020.
- The Indian domestic Textile and Apparel market size in 2009 was Rs 2,18,570 crores (US\$ 47 Bn) and is expected to grow @ 11% CAGR to reach Rs 6,56,000 crores (US\$ 140 Bn) by 2020
- Domestic Apparel retail market was worth Rs 1,54,000 crores (US\$33 Bn) in 2009 and is expected to reach Rs 4,70,000 crores (US\$ 100 Bn) by 2020
- Men's wear has the majority share of Apparel market currently (43%). However, women's wear is growing at a higher rate of 12% compared to men's (9%), boys' wear (10%) and girls' wear (11%). Due to high growth, women's wear share is expected to reach 43% in 2020 from the current 37% share.
- Home Textile market is estimated at Rs 15,570 crores (US\$ 3.5 Bn) in 2009 and expected to reach Rs 40,000 crores (US\$ 9 Bn) by 2020 growing @ 9% CAGR.
- Technical Textiles market is estimated at Rs 49,000 crores (US\$ 10.5 Bn) in 2009 and expected to reach Rs 1,46,000 crores (US\$ 31 Bn) by 2020 growing @ 10% CAGR.
- The main drivers of domestic growth are increasing population, increasing income levels, rapid urbanization, improving demographics, increased organized players and increasing penetration of retailers into smaller cities.
- Global Textile and Apparel trade is recovering after a slump during the economic recession in 2008-09, and is expected to reach US\$ 1 Trillion by 2020 from the current US\$ 510 Bn. The growth in trade is driven by increased outsourcing of western / developed countries towards lower cost countries in Asia.

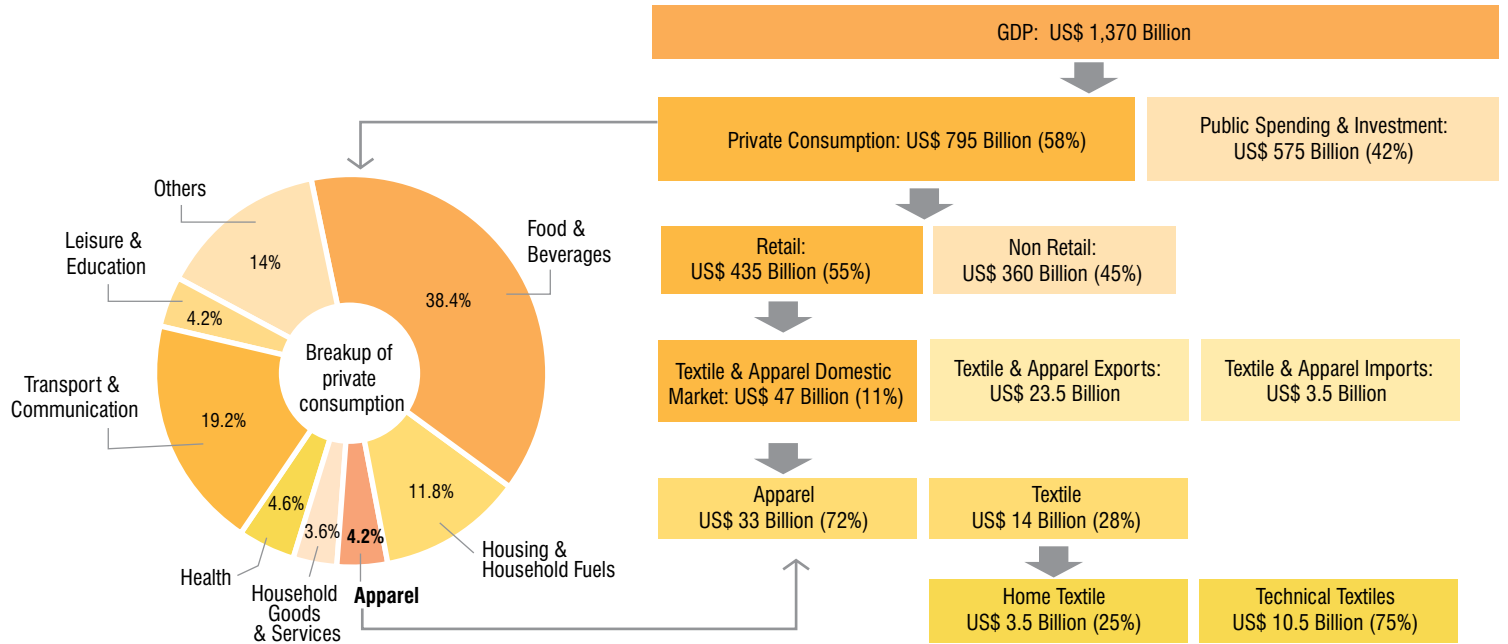
- India's exports have also recovered in 2009-10 following increased global demand and is currently worth Rs 1,10,450 crores (US\$ 23.5 Bn).
- India has the potential to increase its export share in world trade from the current 4.5% to 8% and reach US\$ 80 Bn by 2020. The high growth of Indian exports is possible due to increased sourcing shift from developed countries to Asia and India's strengths as a suitable alternative to China for global buyers.
- In terms of financial returns, Apparel is the most attractive product category amongst retail product categories both in terms of Returns on Capital Employed and EBITDA. Garmenting & Technical Textiles are the most attractive segments within the Apparel value chain in terms of ROA and EBITDA.
- Investments to the tune of Rs 3,20,000 crores (US\$ 68 Bn) across the Textile supply chain will be required by 2020 to tap the potential market created due to growth of the industry. Investment required in garment sector by 2020 is to the tune of US\$ 14 Bn and for processing is US\$ 19 Bn.
- High growth categories include Women's casual wear, Innerwear, Activewear, Kids wear, Women's Western wear, Plus Size Apparel, Lingerie, Workwear & Uniforms, Technical Textiles and Home Textiles.

Indian Domestic Market: Textile & Apparel



Textile & Apparel's Contribution to India's GDP

2009

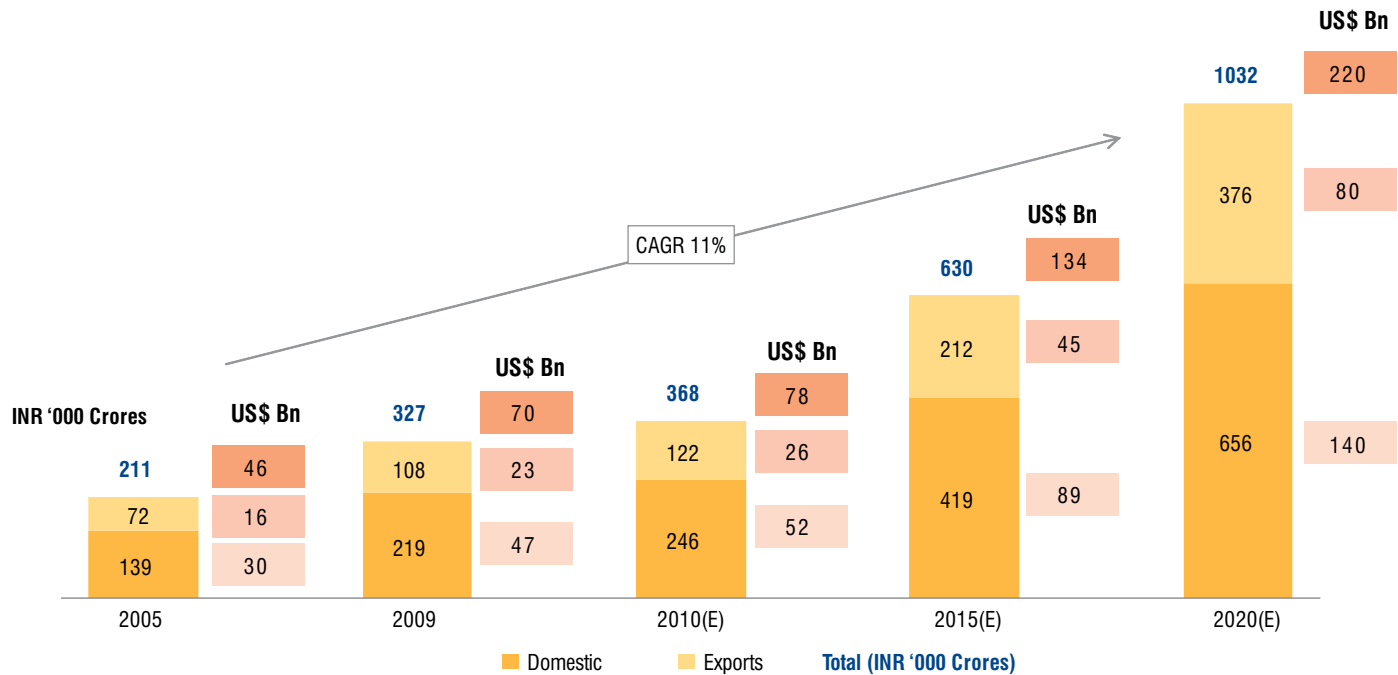


Source : Technopak Analysis

*All numbers are rounded off

Indian Textile and Apparel Industry Size

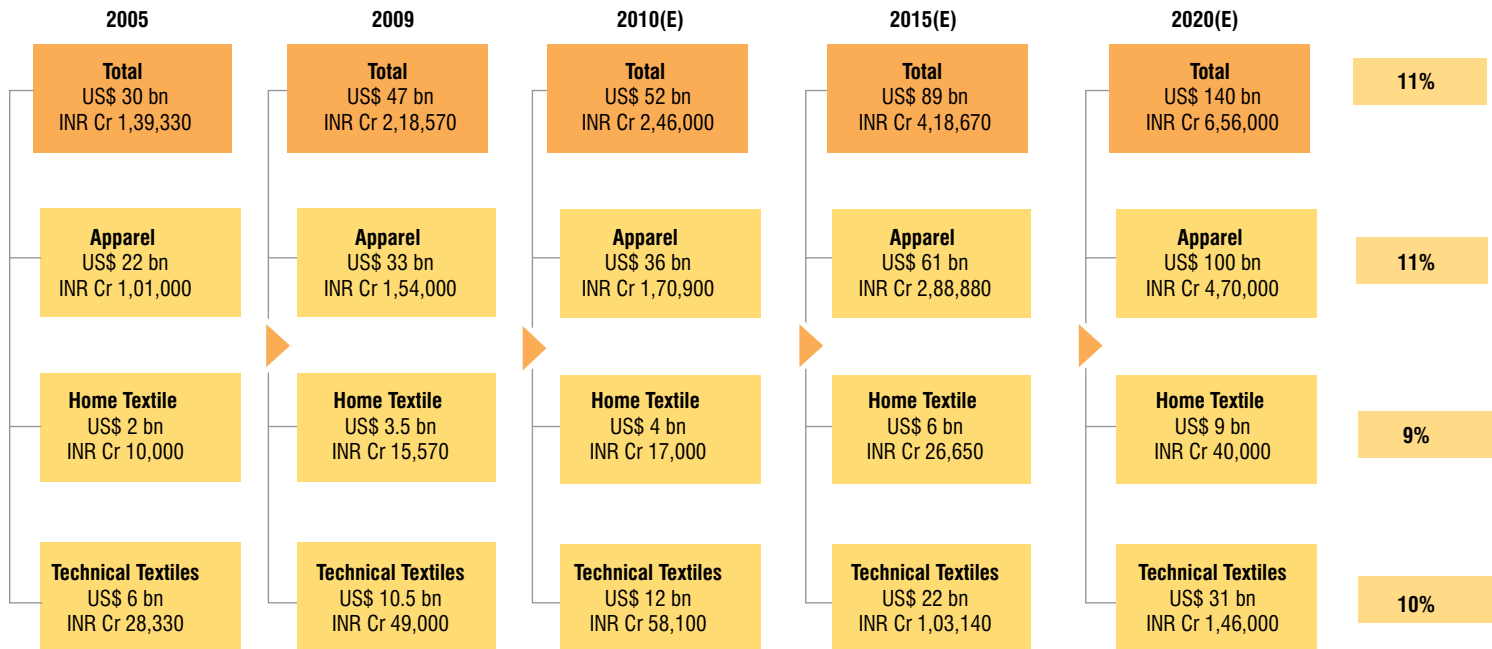
India's total Textile and Apparel industry size is valued at Rs 3,27,000 crores (US\$ 70 Bn) in 2009 and is estimated to grow @ 11% CAGR to reach Rs 10,32,000 crores (US\$ 220 Bn) by 2020



Source : Technopak Analysis *All numbers are rounded off

Overall Domestic Textile and Apparel Market

The current domestic Textile and Apparel market of US\$47 Bn is expected to grow @ 11% annually to reach US\$ 140 Bn by 2020



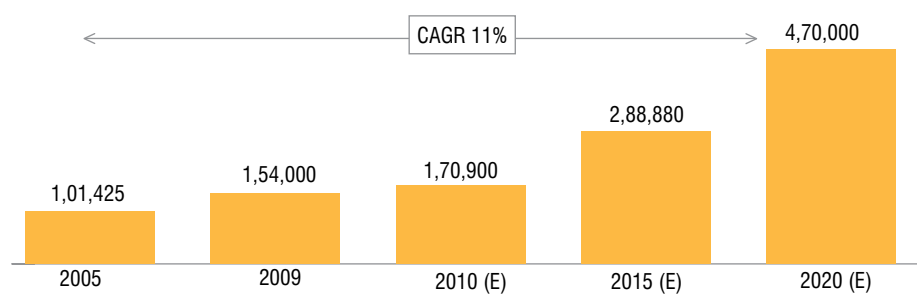
Source : Technopak Analysis

* Values given for Apparel and Home Textile is at the retail end, while for Technical Textiles, it is a combination of B2C and B2B depending on the category.

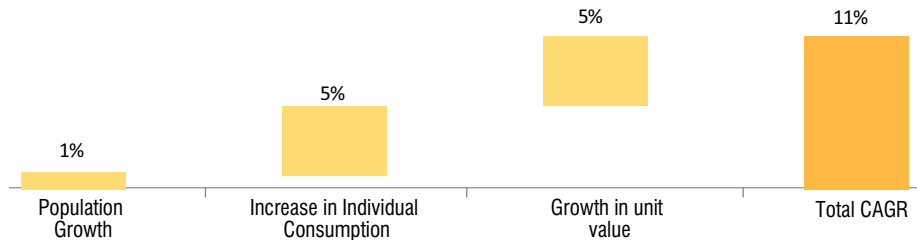
Indian Apparel Market Size and Growth

Indian domestic Apparel market is expected to grow @ 11% CAGR, primarily driven by high unit value growth (due to growth in organized and branded segment), apart from increase in per capita consumption of clothing due to favourable consumer demographics

Total Apparel Market (INR Cr)



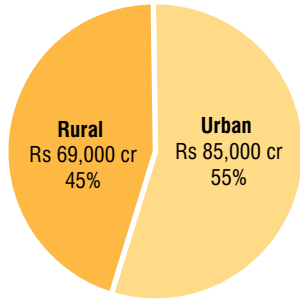
Components of Apparel Market CAGR



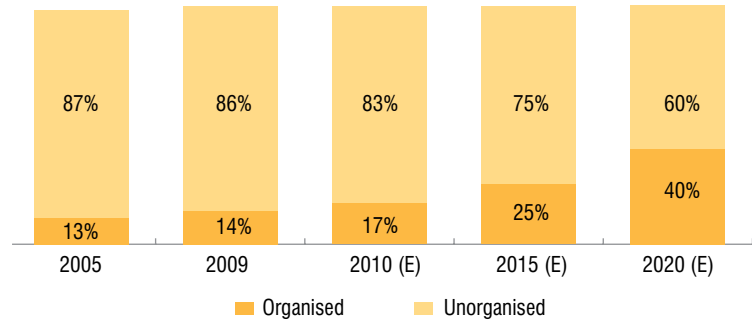
Source : Technopak Analysis *All numbers are rounded off E: Estimated numbers



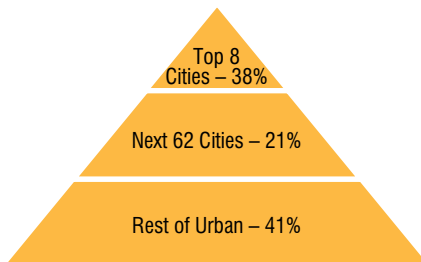
Urban vs. Rural Mix 2009



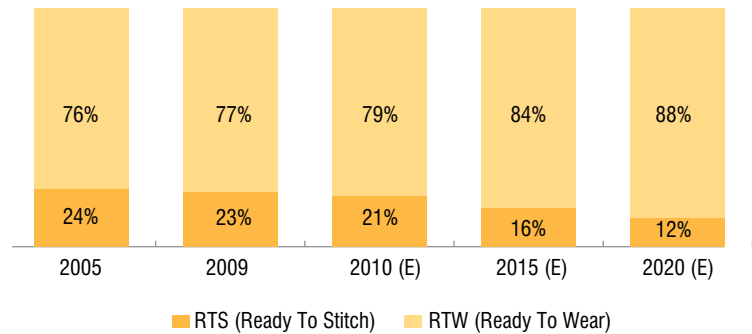
Organized vs. Unorganized Market Share



Breakup of the Urban market



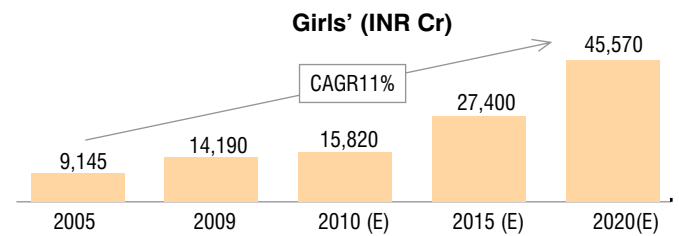
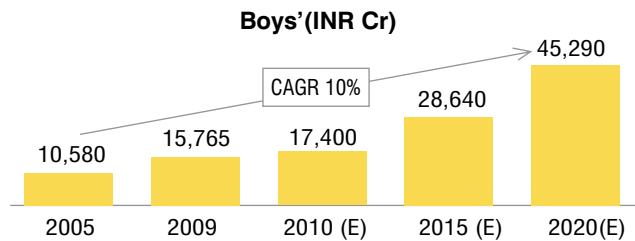
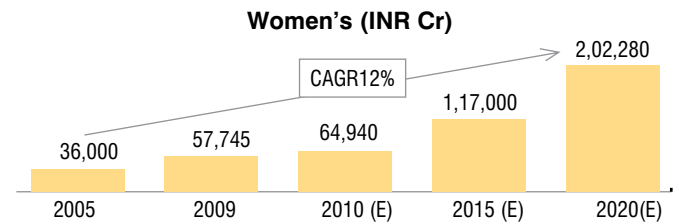
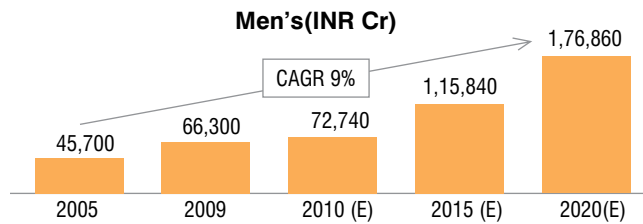
RTS vs RTW Market



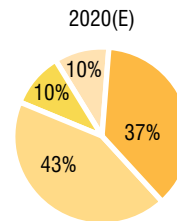
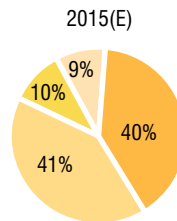
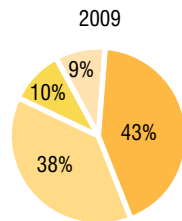
Source : Technopak Analysis *All numbers are rounded off
 Top 8 cities : Mumbai, Delhi, Kolkata, Chennai, Hyderabad, Bengaluru, Ahmedabad, Pune

Segment-wise Market Size and Projections

Currently Men's wear is the biggest segment of the market, however Women's wear is growing faster than other Apparel segments and is expected to gain majority share in future. Kidswear is also growing rapidly with higher growth in girls wear.



Segment Split

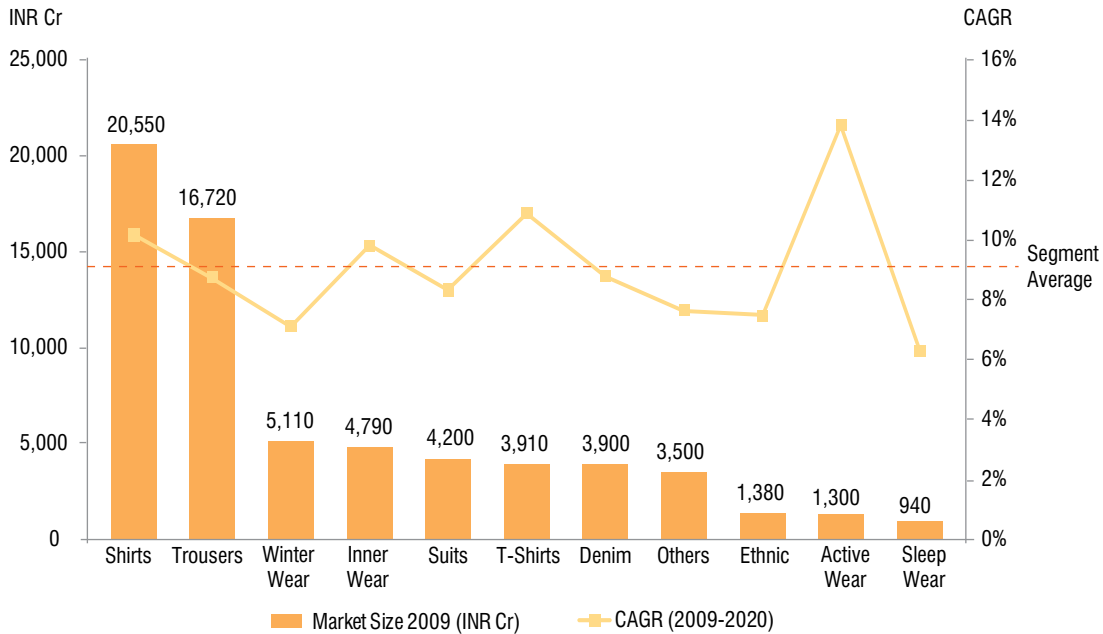


- Men's
- Women's
- Boys'
- Girls'

Source : Technopak Analysis

*All numbers are rounded off

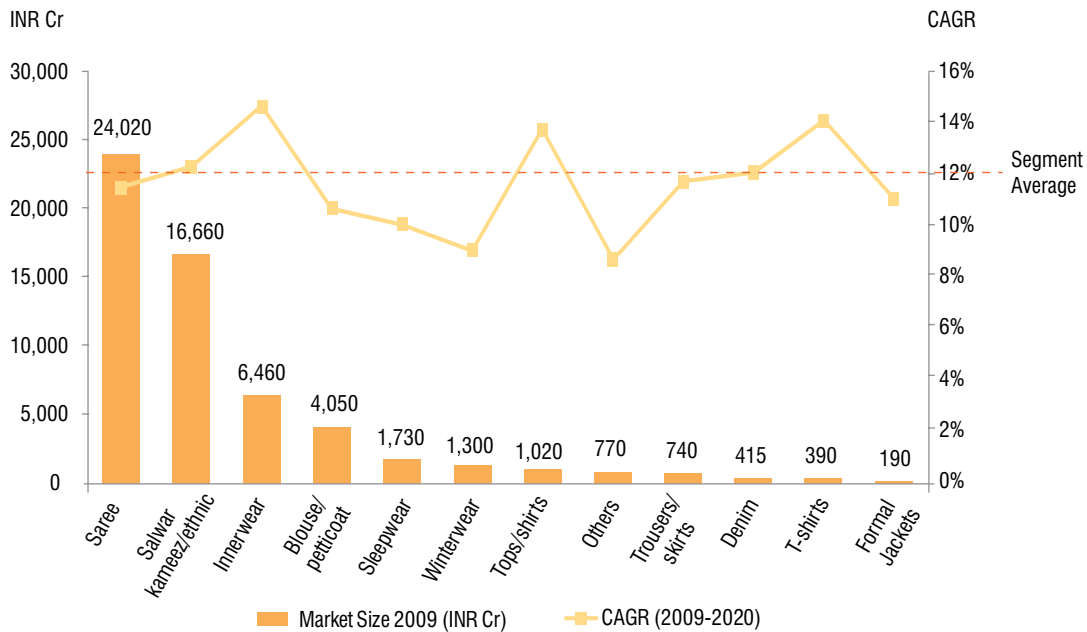
High growth categories in men's market include Activewear, T-Shirts, Innerwear and Shirts



Source : Technopak Analysis

*All numbers are rounded off

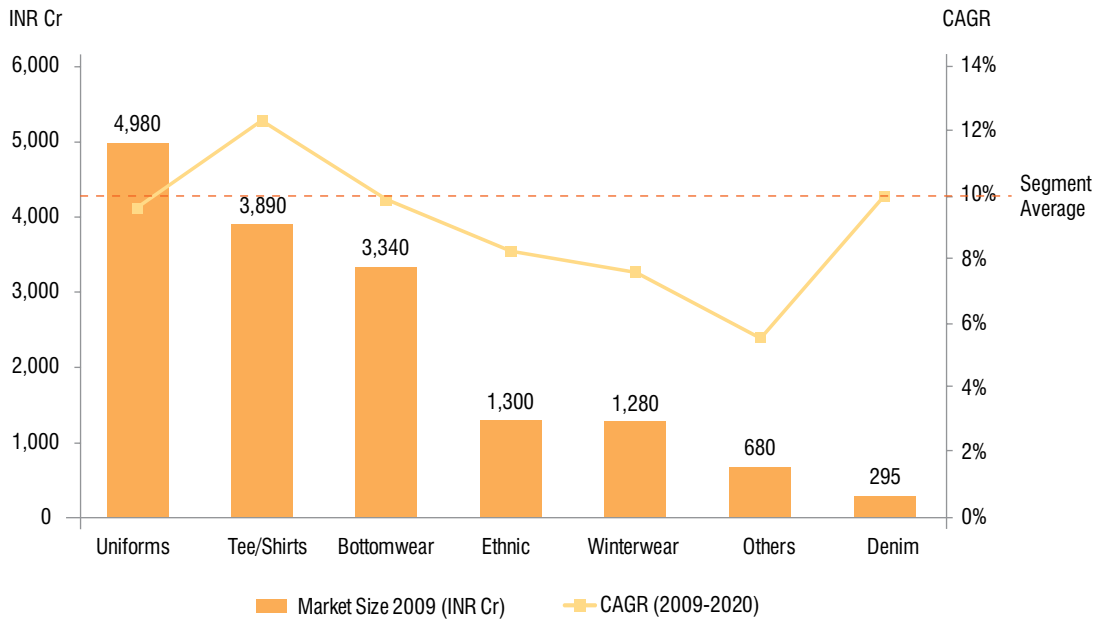
High growth categories in women's market include Innerwear, Woven tops / Shirts and T-shirts. Ethnicwear categories like Sarees and Salwaar Kameez also have high growth potential



Source : Technopak Analysis

*All numbers are rounded off

High growth categories in kids boys market include T-Shirts / Shirts, Bottomwear and Uniforms



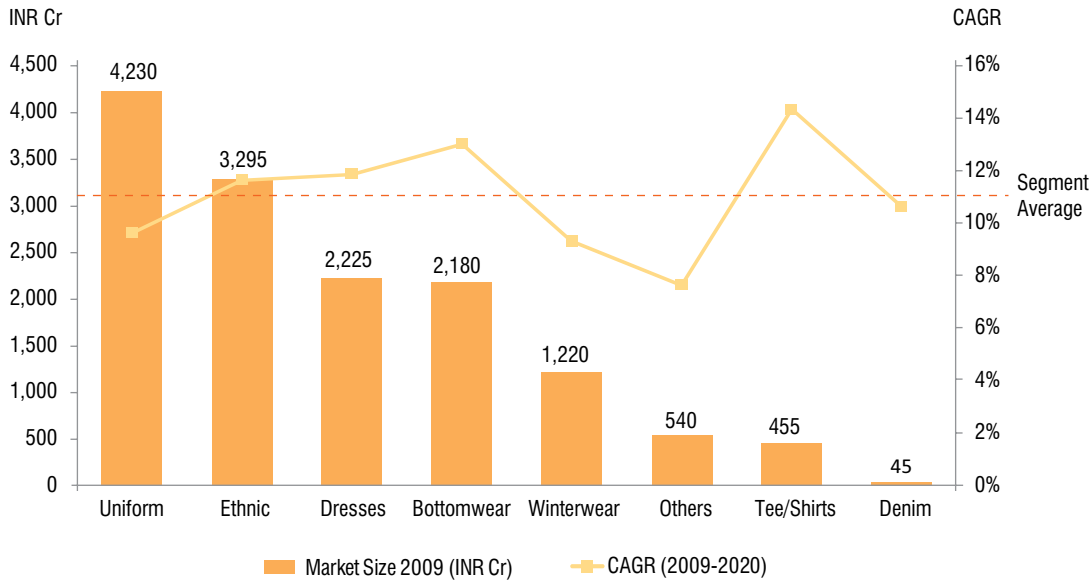
Boys: Male < 14yrs



Source : Technopak Analysis

*All numbers are rounded off

High growth categories in kids girls market include Ethnicwear, Dresses, Bottomwear, Uniforms and T-Shirts



Girls: Female < 14yrs

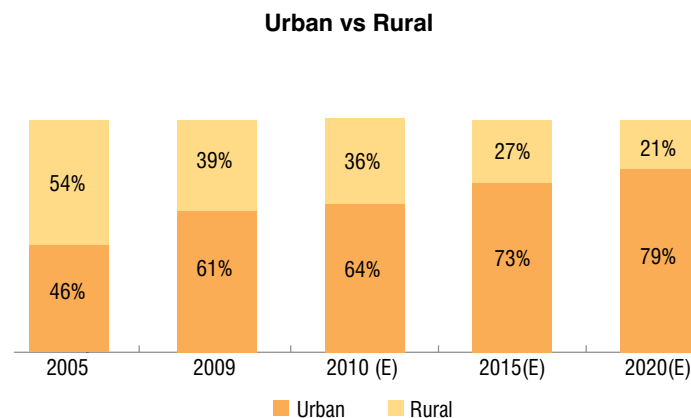
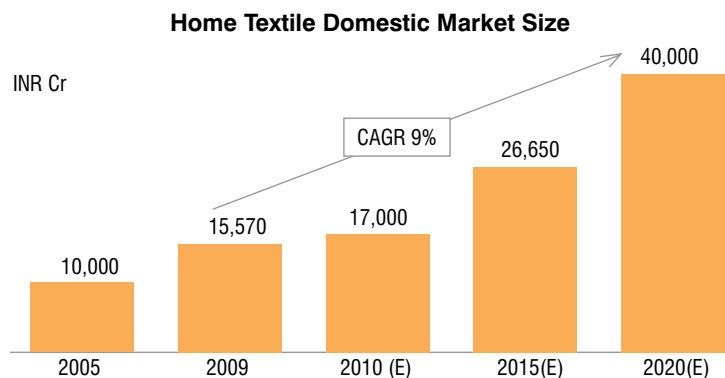


Source : Technopak Analysis

*All numbers are rounded off

Home Textile Market –Increasing with Urban Development

Home Textile market is expected to grow by 9% CAGR till 2020 on the back of increased urban household population and corporatization



Category wise Market Breakup

Categories	2005	2009	2010(E)	2015(E)	2020(E)	CAGR 2009-20
Bed Linen	4,800	7,600	8,300	13,000	19,670	9%
Towels	1,900	2,830	3,080	4,750	6,960	9%
Curtains	970	1,520	1,680	2,700	4,150	10%
Blankets	850	1,270	1,370	2,000	2,820	8%
Upholstery	630	980	1,080	1,800	2,820	10%
Kitchen Linen	600	950	1,030	1,600	2,320	8%
Rugs and Carpets	250	420	460	800	1,260	11%
Total	10,000	15,570	17,000	26,650	40,000	9%

Source : Technopak Analysis

*All numbers are rounded off

Technical Textiles Domestic Market

INR Cr

Sl.No	Segment	2005	2009	2010(E)	2015 (E)	2020 (E)	CAGR
1	Packtech	7,250	18,492	23,400	49,000	72,150	13%
2	Clothtech	6,105	7,200	7,500	9,200	10,230	3%
3	Homotech	1,950	6,887	9,450	15,900	25,600	13%
4	Mobiltech	2,020	3,707	4,300	8,300	11,650	11%
5	Indutech	2,900	3,315	3,400	4,050	4,400	3%
6	Sporttech	3,920	2,564	2,300	2,950	3,350	2%
7	Buildtech	1,500	2,432	2,700	4,990	6,800	10%
8	Meditech	1,410	1,765	1,900	2,470	2,850	4%
9	Protech	670	1,623	2,000	4,070	5,850	12%
10	Agrotech	380	627	700	1,330	1,850	10%
11	Geotech	170	320	380	780	1,150	12%
12	Oekotech	55	68	70	100	120	5%
	Total	28,330	49,000	58,100	1,03,140	1,46,000	10%

High Growth Segments



Domestic demand for Technical Textiles has been increasing and there is substantial opportunity for investments in this sector.

Source : Ministry of Textiles, Technopak Analysis

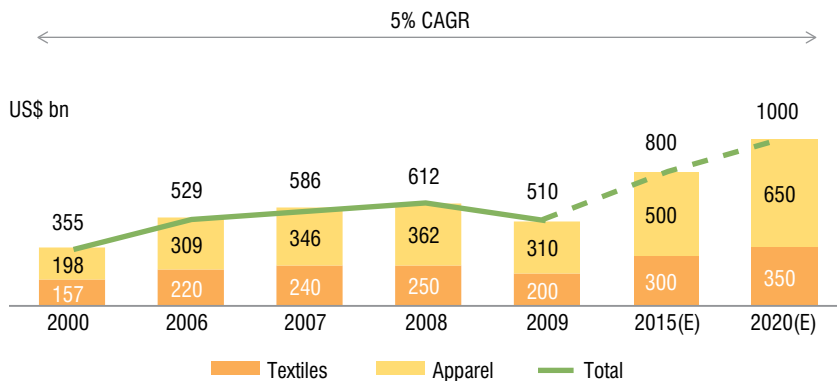
*All numbers are rounded off

A map of Central Asia and China, with labels for 'AFGHANISTAN', 'CHINA', and 'KISTAN'. The map is overlaid on a gradient background that transitions from orange to red.

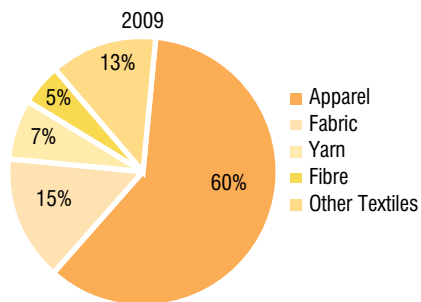
Export Market & Supply Chain Overview



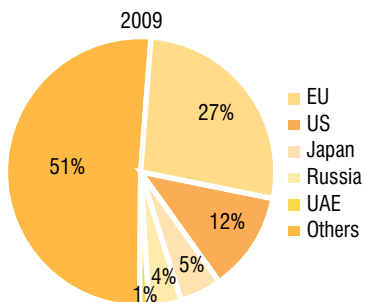
Global Textile & Apparel Trade



Category wise Breakup of Trade



Country wise share of imports



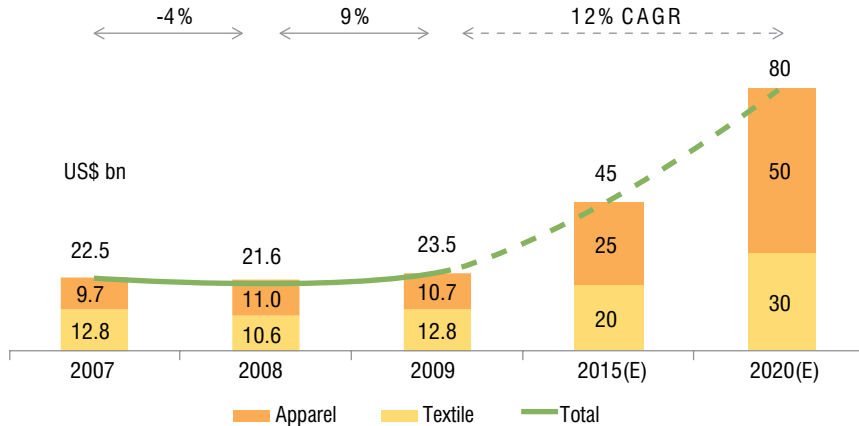
Top Traded Categories

Category	2007	2008	2009
Trousers /Shorts etc.	63	60	48
Sweaters / Jersey's etc.	47	47	37
T-shirts	29	27	22
Blouses / Women's Shirts	17	17	12
Dresses	12	13	12
Overcoats etc.	12	12	9
Men's Woven Shirts	13	12	9
Jackets / Blazers etc.	13	12	8
Babies Garments	9	8	7
Cotton Fibre	7	10	6
Others	365	393	340
Total	586	612	510

Global Textile and Apparel trade is recovering after a slump during the economic recession in 2008-09, and is expected to reach US\$ 1 Trillion by 2020 from the current US\$ 510 Bn

Source: UN Comtrade, OTEXA, Eurostat & Technopak Analysis
 *Other Textiles include: Made ups, Carpets, Accessories, Laminated Textiles etc.

Indian Textile & Apparel Exports

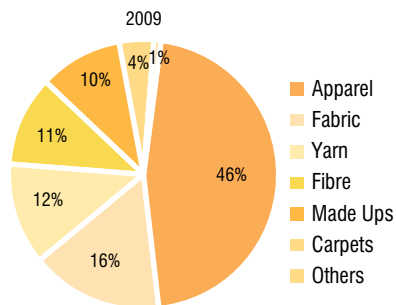


Major Export Categories

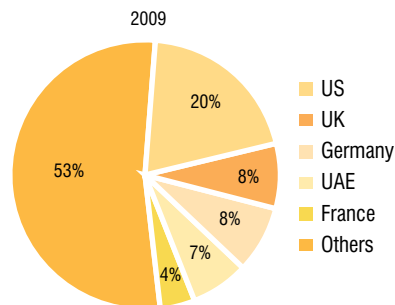
US\$ Million

Category	2007	2008	2009
Cotton Fibre	2,226	645	2,051
Blouses / Women's Shirts	1,419	1,634	1,738
T-Shirts	1,663	1,912	1,678
Trousers / Shorts etc.	1,099	1,214	1,142
Dresses	732	857	1,036
Men's Woven Shirts	803	782	749
Shawls / Scarves etc.	423	612	702
Cotton Bed Linen	429	438	507
Babies Garments	409	460	505
Knitted Shirts	504	520	463
Others	12,741	12,493	12,916
Total	22,448	21,567	23,487

Category wise Export Break up



Country wise Export Break up



Source : Ministry of Textiles, UN Comtrade, Technopak Analysis

- India's exports have also recovered in 2009-10 following increased global demand.
- India has the potential to increase its export share in world trade from the current 4.5% to 8% by 2020.
- The high growth for Indian exports is possible due to increased sourcing shift from developed countries to Asia and India's strengths as a suitable alternative to China for global buyers.

India produces 8 mn tons of fibre annually and production has increased @ 4% CAGR in the last 3 years. Fibre exports have also grown significantly in the last 3 years @ 20 % CAGR.

Fibre - Mn Kg (2008-09)	Production	Imports	Exports	Production Growth (3 yr CAGR)	Imports Growth (3 yr CAGR)	Exports Growth (3 yr CAGR)
Cotton	4,930	195	1,275	6%	32%	17%
Viscose staple fibre	233	11	28	1%	120%	23%
Polyester staple fibre	752	16	136	6%	1%	47%
Acrylic staple fibre	80	11	2	-10%	-3%	-33%
Other MMF fibre	3	17	4	4%	24%	17%
Total MMF	1,067	55	170	3%	13%	37%
Silk	18	8	0.1	2%	0%	-30%
Jute	1,952	59	188	0%	-4%	32%
Wool	45	67	5	0%	-9%	14%
Total Fibre	8,013	384	1,638	4%	10%	20%



Source : Ministry of Textiles, Technopak Analysis

India's yarn production is 5.3 mn tons, increasing @ 5% CAGR in the last 3 years. 20% of the yarn produced is exported.

Yarn - Mn Kg (2008-09)	Production	Imports	Exports	Production Growth (3 yr CAGR)	Imports Growth (3 yr CAGR)	Exports Growth (3 yr CAGR)
100% cotton spun yarn	2,899	5	556	5%	2%	0.20%
Cotton blend spun yarn	655	28	76	4%	16%	-3%
100% non cotton spun yarn	361	42	174	1%	27%	4%
MMFY	1,416	152	225	6%	0%	14%
Viscose Filament Yarn	42	5	4	-7%	27%	-25%
Polyester Filament Yarn	1,330	70	200	7%	-9%	24%
Nylon Filament Yarn	28	3	2	-9%	-32%	-22%
Other MMFY	15	74	18	4%	17%	-17%
Total Yarn	5,331	227	1,031	5%	5%	3%



Source : Ministry of Textiles, Technopak Analysis

India's fabric production is 54,966 mn sq mtrs increasing @ 3% CAGR in the last 3 years. 5% of the fabric produced is exported. Exports are increasing at a high rate of 14% CAGR in the last 3 years, driven by significant growth of knitted fabric exports.

Fabric - Mn sq mtrs (2008-09)	Production	Imports	Exports	Production Growth (3 yr CAGR)	Imports Growth (3 yr CAGR)	Exports Growth (3 yr CAGR)
Knitted fabric	12,077	989	459	5%	64%	66%
Woven fabric	42,889	601	2,102	3%	5%	9%
Cotton Woven	16,720	144	688	3%	1%	4%
Synthetic Woven	20,093	161	992	4%	-1%	15%
Other Woven	6,076	296	422	2%	11%	7%
Total Fabric	54,966	1,590	2,561	3%	29%	14%



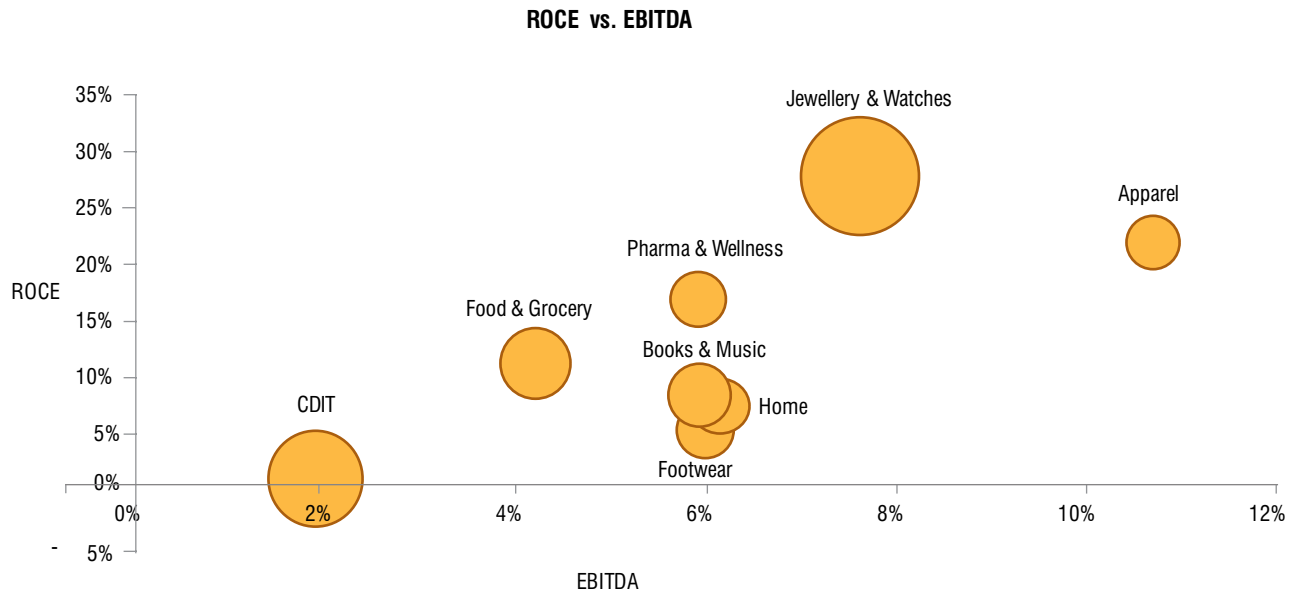
Source : Ministry of Textiles, Technopak Analysis

Financial & Growth
Aspects of Textile Value
Chain



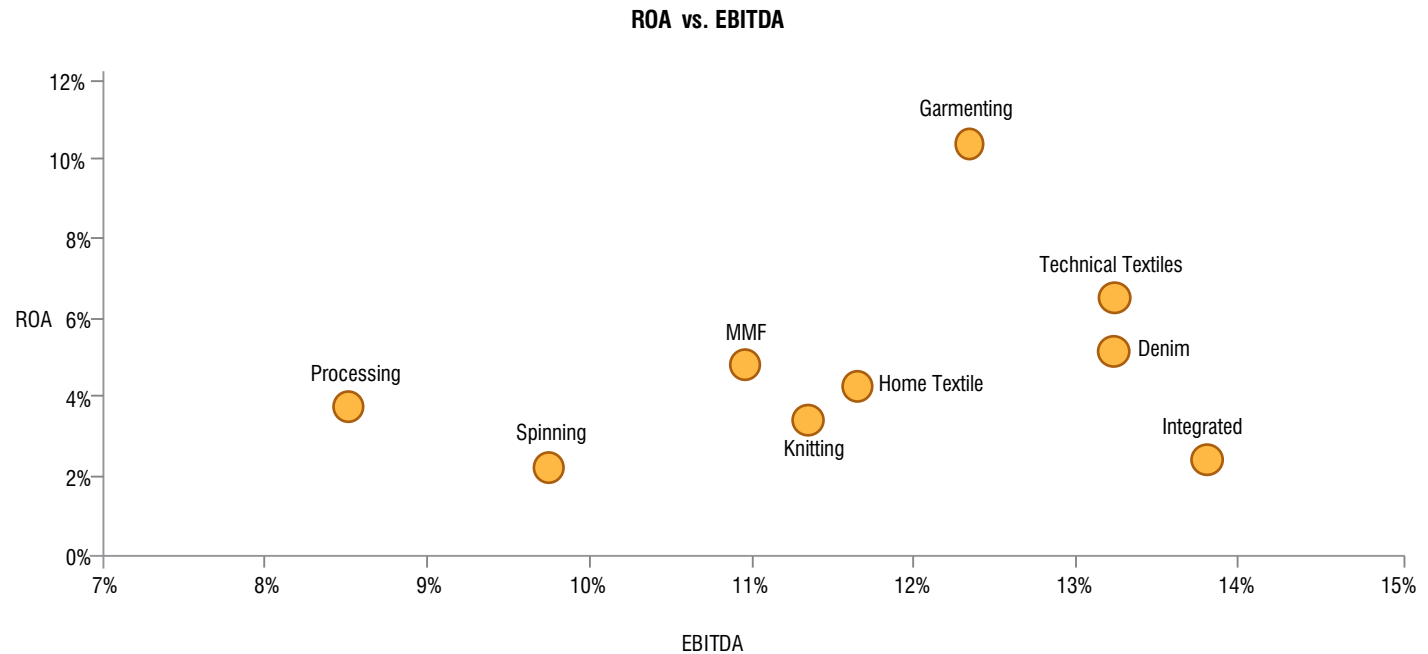
Apparel vs. Non-Apparel Retail: ROCE vs. EBITDA

Apparel retail is better than other product categories in terms of ROCE (Return on Capital Employed) and EBITDA and hence the most attractive segment for retail investment



Source : Technopak Analysis
Size of bubble represents sales per sq. ft per annum (for example Apparel bubble is Rs 8,000 per sq ft/ annum)
CDIT: Consumer Durables and Information Technology

Within the Textile supply chain Garmenting and Technical Textile segments are the most attractive in terms of financial returns



Source : Company Financial Reports, Technopak Analysis

*Based on financial statement analysis of Top listed companies in each of the above mentioned sectors

Value Addition Through Supply Chain

- Yarn – 40's, 100% cotton, combed yarn
- Fabric – 132 x 72 Poplin, Medium shade
- Shirt sold by a mass merchant



Fiber 375g
Rs 28



Yarn 300g
Rs 56



Fabric 1.5 m
Rs 120



Garment 1 shirt
Rs 190



Retail 1 shirt
Rs 400

• **Indicative Numbers**

Source : Technopak Analysis

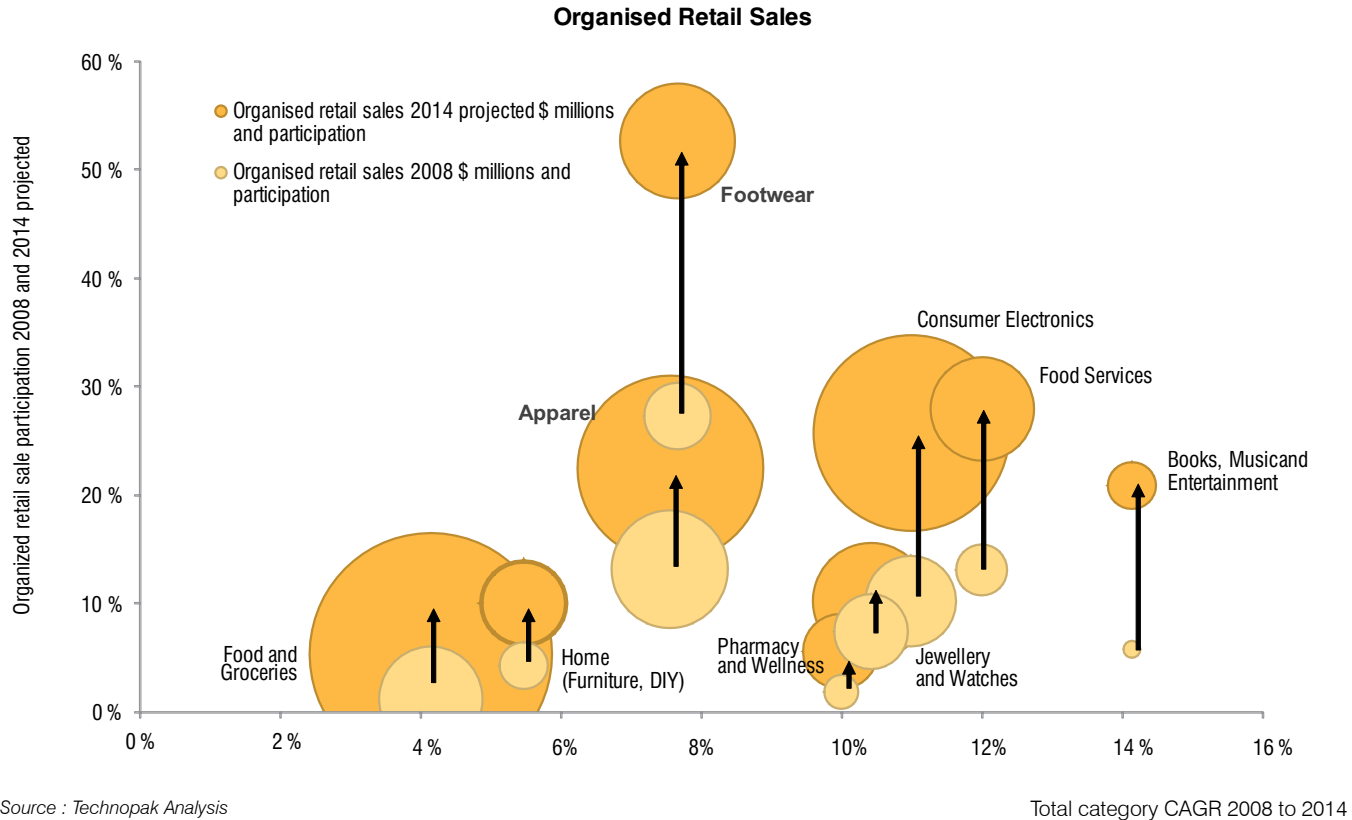
Investments Required in the Textile Supply Chain by 2020

In order to capture the additional market (US\$ 150 Bn) created for Textile and Apparel by 2020, investments to the tune of Rs 3,20,000 crores (US\$ 68 Bn) across the Textile supply chain will be required

Segment	Additional Production	Additional Capacities Required	Investment Required	
			In Rs. Crores	In US\$ Bn.
Spun yarn	3.9 Bn. kg	New spindles - 13.6 million Modernized spindles - 8 million	42,000	9
Filament Yarn	5.8 Bn. Kg	Production from modernized capacity - 0.5 Bn kg Production from brownfield expansion - 4.2 Bn kg Production from greenfield projects - 1.1 Bn kg	31,000	7
Weaving	50 Bn. sq. m.	New Shuttleless Looms - 77 thousand Second hand Shuttleless Looms - 65 thousand Automatic looms - 1 lakhs Semi automatic - 2 lakhs Plain - 2.35 lakhs	37,000	8
Knitting	76 Bn. sq. m.	New Machines - 84 thousand Second hand machines - 56 thousand	25,000	5
Processing	95 Bn. sq. m.		90,000	19
Garment and Made-ups	38 Bn. pcs.	Machines required - 21 lakhs (for 2 shift working)	65,000	14
Technical Textiles			30,000	6
Total			3,20,000	68

Apparel vs. Non-Apparel : Organized Retail

Apparel is placed well compared to other sectors both in terms of size and growth of organized retail



High Growth Opportunities

- Kids Wear
- Women's Western wear
- Plus Size Apparel
- Lingerie
- Workwear & Uniforms
- Technical Textiles
- Home Textiles



Key Growth Drivers

- Increasing brand /fashion consciousness and spending on kids
- Increasing urban women population and women corporate workforce
- High and increasing share of obese population in India and lack of existing ready to wear brands in this space
- Increasing fashion consciousness and need for better retail experience for women's innerwear
- Growing modernization and increasing image consciousness and compliance amongst corporates
- Increasing government infrastructure spending and growing sectors like healthcare, automobiles etc.
- Increasing urban households and corporate interiors

Annexure: Assumptions & Definitions



Key Assumptions

- Growth for market is in nominal terms
- Exchange rate (US\$ to Rs conversion) maintained at Rs 47 for current market and future projections
- All figures have been rounded off

Definitions

- Bn: Billion
- CAGR: Compound Annual Growth Rate
- Casual wear: clothes worn for casual occasions like t-shirts, denim, casual shirts etc.
- E: Estimated numbers for future years
- EBITDA: Earnings Before Interest, Tax , Depreciation and Amortization
- INR: Indian National Rupee (Rs)
- MMF: Man Made Fibres
- MMFY: Man Made Filament Yarn
- Mn: Million
- ROA: Return on Assets
- ROCE: Return on Capital Employed
- RTS (Ready To Stitch): includes fabric bought at retail stores by consumers. The following are the main categories
 - » Shirting fabric, Suitings / Trousers fabric, Salwaar Kameez Dupatta fabric (SKD)etc.
 - » Tailoring cost for these fabric are factored in the RTW market.
- RTW (Ready To Wear): includes all garments sold in India
- SEC: Socio Economic Classification

The following are the broad categories of Apparel and respective products in each category

Men's wear (Male > 14 yrs)	
Shirts	Woven Shirts (full sleeve and half sleeve)
Trousers	Woven Trousers (Formal wear, Casual wear)
Suits	Formal Suits , Safari Suits, Coats
Winterwear	Sweaters, Jackets, Jerseys, Shawls etc.
T-Shirts	Knitted T-shirts
Denim	Jeans, Denim Tops
Sleepwear	Woven & Knitted Pyjamas / Shorts worn during sleep
Activewear	Sportswear, Gymwear, Swimwear etc.
Ethnic	Kurta Pyjamas, Sherwani, Dhoti, Lungis etc
Innerwear	Mens Briefs, Vests etc.
Others	Ties, Socks, Handkerchiefs, Gloves and other accessories etc.

Women's wear (Female > 14 yrs)	
Saree	Sarees
Salwar Kameez / Ethnic	Salwaar Kameez Dupatta, Lehenga, Churidar, Dresses etc.
Tops/shirts	Woven Tops / Shirts / Dresses mostly for Formal wear
T-Shirts	Knitted t-shirts for Casual wear / Party wear
Denim	Women's Jeans and Denim Tops
Formal Jackets	Women's suits Jackets for formal wear
Sleepwear	Nightwear including Maxi, Nighties etc.
Trousers/skirts	Women's Trousers (formal and casual), Capris, Skirts etc
Innerwear	Women's Lingerie items (Bras, Panties, Camisoles etc.)
Blouse/petticoat	Saree Woven Blouses and Petticoat
Winterwear	Sweaters, Jackets, Shawls etc.
Others	Accessories including Bags, Gloves, Handkerchiefs etc.

Boys' wear (Male < 14 yrs)	
Tee/Shirts – Boys	Boys' T-shirts, Woven Shirts
Denim – Boys	Boys' Jeans, Denim shirts etc.
Bottomwear – Boys	Boys' Trousers , Shorts, Corduroys, Cargos etc.
Ethnic – Boys	Boys' Kurta Pyjama, Sherwani etc.
Winterwear – Boys	Boys' Sweaters, Jerseys, Jackets etc.
Uniforms- Boys	School Uniforms
Others – Boys	Accessories like Socks, Gloves etc.

Girls' wear (Female < 14 yrs)	
Bottomwear – Girls	Girls Trousers, Skirts etc.
Ethnic – Girls	Salwaar Kameez Dupatta, Churidar etc.
Tee/Shirts – Girls	T-shirts, Woven Shirts
Denim – Girls	Jeans, Denim Tops etc.
Dresses – Girls	Frocks, Dresses etc.
Winterwear – Girls	Sweaters, Jackets etc.
Uniform – Girls	School Uniform
Others – Girls	Accessories like Socks, Scarves etc.

Technical Textiles	
Agrotech	Agriculture, Horticulture and Forestry
Buildtech	Building and Construction
Clothtech	Technical components of Shoes and Clothing
Geotech	Geotextiles, Civil Engineering
Homotech	Components of Furniture, Household Textiles and Floor Coverings
Indutech	Filtration, Cleaning and other industrial usage
Meditech	Hygiene and Medical
Mobiltech	Automobiles, Shipping, Railways and Aerospace
Oekotech	Environmental Protection
Packtech	Packaging
Protech	Personal and Property protection
Sporttech	Sport and Leisure

Home Textiles	
Bed Linen	Bed Sheets, Bed Covers, Quilts, Duvets, Comforters, Pillows etc.
Blankets	Blankets used for Warmth covering during sleep
Curtains	Made ups hanged for Covering Doors and Windows
Kitchen Linen	Aprons, Table Mats, Oven mitts etc
Rugs and Carpets	Textile floor covering
Towels	Bath Towels, Bath Robes etc
Upholstery	Sofa covers etc.

About Technopak



We are a management consulting firm with a difference. Founded in 1992 on the principle of “concept” to “commissioning”, we are in the top 5 consulting firms in India by revenues. We are strategic advisors to our clients during the ideation phase, implementation guides through start-up phase, and trusted advisors overall. The industries we serve include **Retail, Consumer Products, Fashion (Textiles & Apparel), Healthcare, Hospitality & Leisure, Food & Agriculture, Education and Real Estate.**

Our clients are leading Indian and international businesses, entrepreneurs, investment houses, multilateral development bodies and governments. Our 600+ clients include Aditya Birla Group, Apollo Hospitals, Arvind Limited, Asian Development Bank, Asian Paints, Temasek Holdings, Essar, GMR Group, Godrej Group, Gujarat Government, Hospital Corporation of America, ICICI Limited, Hindustan Unilever Limited, International Finance Corporation, Lenovo International, Mahindra Group, Marks & Spencer, Mother Dairy Foods, Ministries of Food Processing, Textiles & Commerce, Raymond, Reliance Industries, Samsung, Sequoia Capital, Starwood (Sheraton), Tata Group, United Nations Development Program, Walt Disney, Warburg Pincus and many other Indian and international leaders.

Services We Offer in Management Consulting

At Technopak, we foster innovation and creativity which challenge conventional thinking and generate practical and far reaching solutions for our clients. In 2009, we worked with over 95 clients across 120+ projects, in 12 countries besides India, across 3 continents.

Our key services are:

Business Strategy. Assistance in developing value creating strategies based on consumer insights, competition mapping, international benchmarking and client capabilities.

Start-Up Assistance. Leveraging operations and industry expertise to 'commission the concept' on turnkey basis.

Performance Enhancement. Operations, industry & management of change expertise to enhance the performance and value of client operations and businesses.

Capital Advisory. Supporting business strategy and execution with comprehensive capital advisory in our industries of focus.

Consumer Insights. Holistic consumer & shopper understanding applied to offer implementable business solutions.

Strategy & Planning

- Business Entry
- India Entry & Partnerships
- Growth and Diversification
- Marketing and Distribution

Development

- Cluster Development
- Capacity Building
- Public Private Partnerships
- Program Planning & Administration

Capital Advisory

- Due Diligence
- Mergers and Acquisitions
- Partner Search
- Investment Evaluation

Industry Insights

- Consumer Insights
- Industry Studies & Trends
- Industry Benchmarking
- Market Insights

Textile Operations

- Project Management (PMC)
- Construction Management (CMC)
- Technology Selection
- Techno-economic feasibility report
- Business Process Re-engineering

Apparel Operations

- Factory Start Up - Assignments:
 - » Planning and Design of Factory
 - » Selection and Pre-Training
 - » Implementation
- Lean Manufacturing
- Performance Enhancement

Industry Segments We Serve

Textile Manufacturers	Apparel Manufacturers	Textile Machinery Manufacturers
Fashion Retailers	Technical Textile	Government
Development Agencies	Private Equity	Financial Institutions

Services we offer through our Group Companies



Planning, implementation and project management of plants, warehouses and entertainment centers with a focus on modernization, process improvement, technical valuation, power & water audit and environmental engineering. www.arvana.in

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www.technopak.com/tfas

Services we offer through our Strategic Partnerships



World's largest privately held real estate services firm. We offer, through them, comprehensive retail real estate solutions to our clients.

www.cushwake.com



UK's leading design consultancy for developing brand environments. We offer, through them, design solution for retail environments.

www.dalziel-pow.co.uk



Global research and consulting firm specializing in the study of human behavior in retail, service, home, and on-line environments. We offer consumer and shopper insights.

www.envirosell.com



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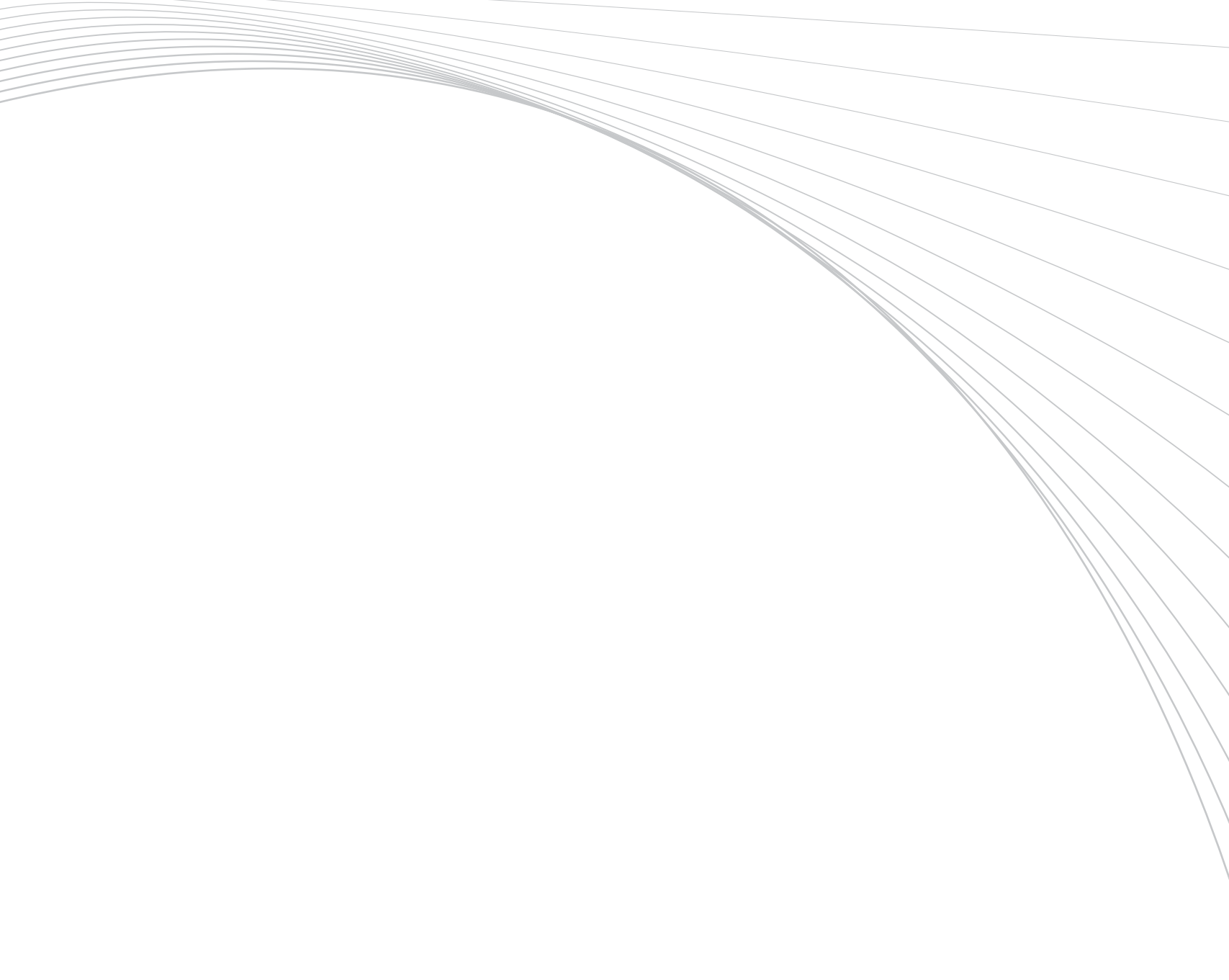
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Designing • Sampling • Weaving • Knitting • Processing • Embroidery • Garmenting • HomeTextiles • Retailing

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- **Raghav Gupta**, President | raghav.gupta@technopak.com
- **Ashish Dhir**, Associate Vice President | ashish.dhir@technopak.com
- **Pakhie Saxena**, Principal Consultant | pakhie.saxena@technopak.com
- **Vijaya Kumar**, Principal Consultant | vijaya.kumar@technopak.com
- **B.Prakash**, Senior Consultant | b.prakash@technopak.com
- **Varun Vaid**, Senior Consultant | varun.vaid@technopak.com
- **Somnath Talukdar**, Consultant | somnath.talukdar@technopak.com
- **Arvin Mondal**, Consultant | arvin.mondal@technopak.com



www.technopak.com

Ashish Dhir

Associate Vice President, Fashion Practice

E : ashish.dhir@technopak.com

M : +91 9871654747

Technopak Advisors Pvt. Ltd.

Gurgaon

4th Floor, Tower A, Building 8
DLF Cyber City, Phase II,
Gurgaon 122 002
(National Capital Region of Delhi)

T: +91-124-454 1111

F: +91-124-454 1198

Bengaluru

Prestige Solitaire, Ground Floor,
6 Brunton Road, Off MG Road,
Bengaluru 560 025
India

T: +91-80-4034 8600

F: +91-80-4034 8699

Mumbai

101-105, 2nd Floor, Sunjana Tower
Sun Magnetica Service Road,
Luis Wadi, Thane West,
Mumbai 400 602

T: +91-22-2583 2222

F: +91-22-2583 8408