



## APPAREL INDUSTRY: AN OVERVIEW

and

Why Choose ATDC Pro-UP as Knowledge & Skill facilitator for your organization?

*(360 SECONDS READING CAN CHANGE YOUR VISION 360 DEGREES)*

### Global Scenario

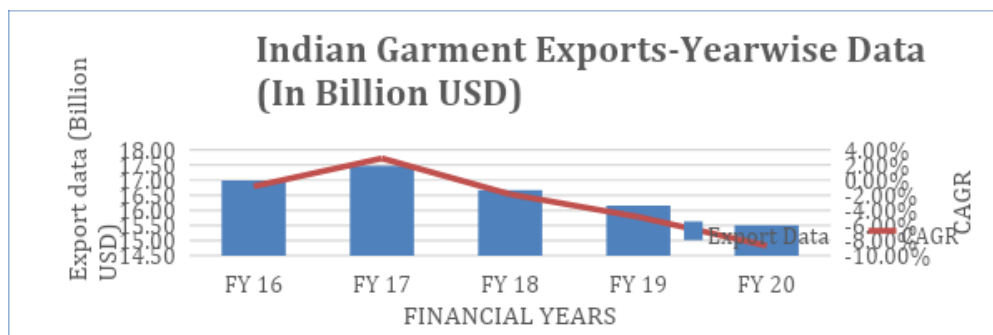
The apparel industry has been hugely impacted due to the unprecedented challenges of the pandemic. The current scenario of the global apparel industry shows decline in consumer purchasing power and disruption of supply chains across all segments globally. The global apparel consumption is estimated to have shrunk by 22% in 2020. Below is a glimpse of the major textile & apparel markets performance over the corona ridden year.

Region	Value in Billion USD		Year- Over- Year Difference
	2019	2020	
EU- 27	264	219	-17%
US	235	171	-27%
China	181	173	-4%
Japan	106	83	-22%
India	78	55	-29%
Brazil	48	34	-29%
Canada	33	27	-18%
RoW	690	517	-25%
World	1635	1279	-22%

Source: Published Industry Report

## Indian Apparel Industry

COVID- 19 acutely impacted every industry, and the Apparel Industry was no exception. While the Indian Apparel Industry was already plagued with a plethora of issues, the wave of COVID- 19 hit, creating more challenges for the industry. In the same period, Indian apparel exports declined from 15.5 billion USD to 12 billion USD in FY 20, recording a decline of 23%.



**Source:** Published Industry Report

### *What are the persistent problems being faced by Indian Apparel Industry ?*

- **Limited Product diversity:** The Indian apparel industry owing to its limited product basket could not take benefit of the market vacated by China due to the US-China trade war and countries of the likes of Vietnam, Cambodia and Bangladesh benefited of the same.
- **Inadequate no. of free trade agreements with major markets:** The Indian garment exporters also face stiff competition from the manufacturers of Bangladesh, Vietnam and African countries due to the latter having comprehensive free trade agreements with EU, USA and the other major apparel markets.



- **Average productivity lesser compared to other competitors:** : The Indian garment industry also loses on to countries like china, Vietnam & Bangladesh when it's come to productivity as an average Indian apparel factory works at lower productivity when compared to the likes of Bangladesh, Vietnam

Garment Factory Productivity Levels in Selected Countries	
India	40-45%
Bangladesh	50-55%
Turkey	60-65%
China	60-65%

**Source:** Industry Feedback

- **Lower investment in Operational excellence & Product development:** The global garment industry is becoming intensely competitive, hence it's imperative for the Indian apparel manufacturers to invest comprehensively in scientific industrial engineering, measures to ensure operational excellence and further innovations in product development.

### ***Strengths of the Indian Apparel Industry***

- **A wide raw material base covering both natural as well as synthetic fibres-** The other Asian and African countries which compete with India lack such diversity, which makes India a natural option after China to be considered for a value chain independent of imports.
- **The demographic dividend of largest youth population in the world-** if utilized skillfully, this can establish India as a leading manufacturer of apparel in the future.



- **An emerging domestic Market:** The Indian domestic textile and apparel market was estimated at US\$ 106 billion in the year 2019. The domestic market has grown over the years at 11% CAGR and seems quite promising for leveraging the market industry and reducing its dependability on exports.
- **Markets looking to reduce dependency from China post-pandemic:** Brands tend to keep backup suppliers in another country in addition to China for contingency as an alternative against total dependency on China. India is well placed to attract such brands with its balance of skill, raw material and cheap workforce.

### *How to leverage strengths and enhance manufacturing excellence -HERE IS THE KEY*

It is critical for the industry to focus on achieving manufacturing excellence to achieve cost competitiveness in the global context. Manufacturing excellence is a process where all parameters of production are optimized to maximize production levels, quality and profit. The key components of Manufacturing Excellence include:

- **Operational Excellence:** This focusses streamlining manufacturing operations, quality & process improvement, capacity improvement, and information systems for operations & control.
- **Manpower:** The maintenance of the skill matrix, recruitment & induction of right people for a particular job and retention of human resources help in optimizing resources and enhancing benefits.
- **Market Intelligence:** Every market, whether globally or domestically, is inherently different and it is imperative for companies to develop a strong understanding of each market and how their product will be a specific market fit.
- **Continuous Improvement (Kaizen):** Innovating and sustaining continuous improvement of people, processes and product leads to achievement of excellence. Continuous improvement is all about leading by doing and empowering employees to make continuous improvement.



## **ATDC PRO-UP: YOUR SOLUTION PROVIDER**

ATDC India has always been at the front to provide support to the industry when it comes to providing them with the skilled workforce and other training support. Now at the present unprecedented Covid scenario ATDC has once again came up with a helping hand to the Indian garment & Apparel Industry with its new vertical” ATDC Pro-Up”

ATDC expands its horizons with “ATDC Pro-Up” implying ‘Professional Upgradation’. This vertical is envisaged with an objective to guide and support the Apparel manufacturing organizations by offering customized training solutions and capacity improvement services that would enhance productivity and efficiencies across the manufacturing value chain and solve specific problems faced by different organizations

### **What is ATDC Pro-Up?**

ATDC Pro-Up is an opportunity for the apparel industry to avail of the training solutions and productivity enhancement programs that will be customized to their requirements. Indian factories operate at productivity levels. It has been initiated with a vision to deliver value to manufacturing organizations by providing support based on the diagnostics conducted with their teams. This would also enable professionals & the workforce from the apparel sector and upgrade their skills for consulting skills to have better outcomes and results.



## Why Choose ATDC Pro-UP as Knowledge & Skill facilitator for your organization?

***WANT SAVINGS THROUGH LOW COST INTERVENTION---HERE IS THE SOLUTION***

The Apparel Industry is undergoing significant changes in the context of Industrial Revolution 4.0 and 'New Normal' in the post-Covid-19 health crisis. The current situation demands **better utilization and optimization of the resources** implying higher productivity of machines & workforce, reducing wastages and training for multi-tasking. Professionals also need to upgrade their knowledge base and skills to meet the new challenges. ATDC strongly feels that this can be achieved by proper scientific management, system, and processes. ATDC recognizes the urgency and needs for establishing a support system with direct linkages to the industry and delivers customized training modules that would directly address the specific needs. Professional Up-gradation (ATDC Pro-Up) therefore becomes important.

## Who would benefit from ATDC Pro-Up programs ?

The Pro-Up modules will be providing specialized and customized training to:

The garment factories, workforce across junior- middle management cadres and shop-floor workforce in the factory to enhance efficiency and productivity.

The existing professionals in the Fashion and Apparel sector can upgrade their skills & knowledge base across any segment of the value chain of the Apparel sector.

## Methodology Adopted by ATDC Pro-UP

To help organizations ensure that their workforce is equipped with best practices in the industry, ATDC Pro-Up will employ the following measures:

- ✓ Conduct existing 'Diagnostics Gap Study' in manufacturing chain through Focus Group Discussions with CEO, Team Leads, and cross-functional teams of the organization.
  
- ✓ Problem Identification and Remedial Need Analysis



- ✓ Customized Training Content Development
- ✓ Skill Intervention & Delivery of Customized Modules
- ✓ Assessment & Outcomes

### **A. Upgradation Training Solutions – Fast Track Upgradation Interventions**

- ✓ Fabric & Apparel Technology
- ✓ Pattern Making Techniques
- ✓ Cutting Room Efficiency Enhancement
- ✓ Merchandising Management
- ✓ Production Planning & Control
- ✓ Industrial Engineering Tools & Techniques
- ✓ Supervisors' Training Programme
- ✓ Quality Assurance

### **B. Enhancing Shop floor efficiencies - Long Term Interventions**

Lean Manufacturing Programmes: Lean Tools, Waste Reduction, increased 1st Hour Output and Culture of Continuous Improvement

Productivity Enhancement Programmes: Cost optimization through Work Measurement and Methods Improvement, Reduce Product Development Cycle time.

Quality Improvement Programmes: Understanding the Cost of Quality, Reduced Repair and Rejection Level

Enabling to set up systems and processes by driving efficiencies across operations.



## Modules most in demand under Fast Track Upgradation Interventions

### 1. Quality Enhancement Upskilling Program

For every business organization, to get increased sales and to enhance their brand image it is important to maintain a standard level of quality. Quality is significant to ensure minimum loss of resources both in terms of time and value for any organization.

The top defects majorly in any garment are Broken stitch, Open seam, Skip stitch, Label defects which are the “vital few” where 80% of total defects occur.

**Although organizations have dedicated teams for Quality control, there are a lot of areas where processes can be optimized and money can be saved.** Some of the areas are mentioned below:

- Understanding & complying with the buyer desired AQL
- Problem-Solving through Fishbone Diagram
- Methodology to ensure right garment formation
- Understanding of Fabric/ Garment Defects
- DHU reduction
- SOPs for Pre-production, Inline, and post-production quality inspection

### 2. Upskilling of Supervisors for productivity enhancement

Supervisors are one of the most important component of manufacturing in any organization and are the propellers for effective and efficient manufacturing. **More Skilled the supervisors, better will be the performance of the factory** (both of manpower and material) thereby implying better profit margins. Hence it is imperative for any organization to keep its supervisors well equipped with the best practices in the industry.

Some of the areas of supervisory upskilling are mentioned below:

- Orientation to IE (industrial Engineering) concepts & Tools
- Understanding, Identification and removal of NPT (Non- Productive Time)
- Concepts and tools of work-study, method study and motion study
- Methodology of scientific Line Balancing (Using pitch Time & Pitch diagram)





- Preparation of Standard Operation Bulletins

### **3. Upskilling Machine Maintenance of Basic and Advanced Sewing Machines:**

- Types of SNLS, O/L, F/L Machines, their parts, functions and basic preventive maintenance
- Types of Needles and calculation of Needle Sizes
- Operation Breakdown
- Types of stitches and stitching/ sewing defects
- Fault Analysis and their effects on garments
- work discipline, health and hygiene, and safety
- Basic Maintenance of Lockstitch, Overlock and Flatlock machine including preventive maintenance

### **4. Soft Skills, English and Digital Literacy**

- Soft Skills: Interpersonal Skill Development, Negotiation Skills, Creative Thinking, Time Management, Problem Solving, Decision Making, Group Discussion, Resume & Interview Preparation.
- English Skills: English Grammar & Business Communications, Writing Keys to effective writing, Email Etiquettes and Parts of Speech
- IT Literacy Skills: Typing Tutorial, Computer Security Awareness, Productivity Tools- MS Word, MS Excel, MS PowerPoint

## Summary of some of the Pro- Up Upskilling Programs Conducted

Sno	Organization	Customized Training Content	Training Outcomes
1	<b>Export Firm</b> (approximately Rs. 12-15 Cr turnover)	<ul style="list-style-type: none"> <li>- Communication Skills</li> <li>- Problem Solving and Decision Making Skills</li> <li>- Team Work</li> </ul>	-The group of candidates showed an increase in proficiency from an average of 52.75% to 79% in the pre and post-training assessment.
2	<b>Renowned Fashion Institute</b>	<ul style="list-style-type: none"> <li>- English Skills</li> <li>- Soft Skills</li> <li>- IT Literacy Skills</li> </ul>	<ul style="list-style-type: none"> <li>- Assessments were conducted after the sessions.</li> <li>- The candidates were able to write emails with appropriate punctuation and correct grammar.</li> <li>- They made more comprehensive presentations after the training.</li> <li>- They could solve problems using the Fishbone Diagram.</li> </ul>
3	<b>Export Firm</b> (approximately Rs. 20 Cr turnover )	Importance of Quality in Kidswear	<ul style="list-style-type: none"> <li>- Sensitization of significance of Quality in Kidswear</li> <li>- Awareness about AQL levels</li> <li>- Implementation of Quality Tools</li> <li>- Solving commonly found quality issues in kidswear.</li> </ul>
4	<b>Export and Domestic Brand Owners</b> (approximately Rs. 500 Cr turnover )	Maintenance of Basic and Advanced Sewing Machines	- Assessments were conducted before and after the training to measure the improvement in their knowledge for the maintenance of sewing machines.

			<ul style="list-style-type: none"> <li>- Awareness about preventive maintenance and how to avoid breakdown.</li> <li>-They could demonstrate the partwise maintenance of SNLS, O/L, F/L after the practical sessions conducted during the training.</li> </ul>
5	<b>Industry Professionals</b>	Computerized Pattern Making (CAD)	<ul style="list-style-type: none"> <li>- Candidates learnt new Pattern Making Techniques and made more accurate patterns.</li> <li>- They were more clear with the digital pattern making fundamentals and tools after the training.</li> </ul>
6	<b>Export Firm (approximately Rs. 400 Cr turnover )</b>	Basic Pattern Making	<ul style="list-style-type: none"> <li>- Candidates learnt drafting, draping, and how to work on production patterns with accurate grainlines, symbols and darts.</li> <li>- Candidates showed improvement in pattern making attributes like seam allowance, grainline marking and dart manipulation.</li> <li>- The group of candidates showed an increase in proficiency from an average of 40.55% to 84.15% in the pre and post-training assessment.</li> </ul>

### How to proceed to avail the benefit of ATDC Pro-up Programmes?

Please email us on [roopalishukla@atdcindia.co.in](mailto:roopalishukla@atdcindia.co.in) with details about the enquiry or fill the form <https://forms.gle/UF7aXiZqAqhUCiNS8>

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