

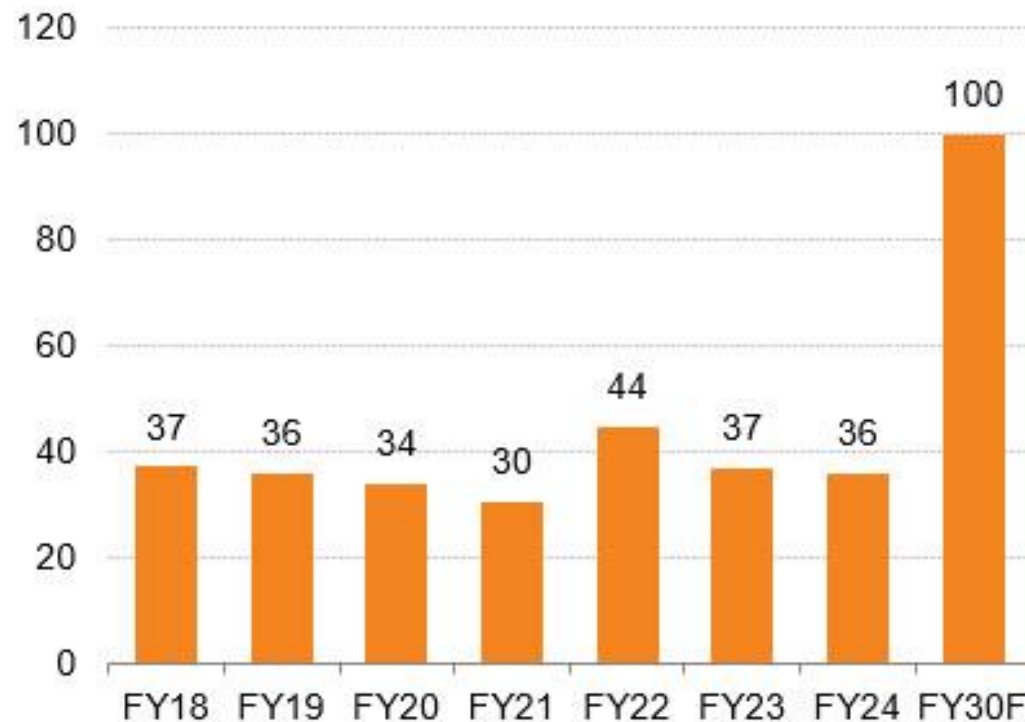
Indian Textile Industry

- India's textile sector is one of the oldest industries in the Indian economy, dating back to several centuries. India's textile sector contributes around 12% to the country's total export earnings. In 2023, India's textile and apparel exports were around \$44.4 billion, making it one of the world's largest exporters of textiles. The textile industry is the second largest employer in India, only after agriculture and is also very labour intensive. It employs about 51 million people directly and 68 million people indirectly.
- The textile industry in India can be divided in two broad segments.
 - First, the unorganised sector which consists of handlooms and handicrafts, operated on a small scale and through traditional tools and methods.
 - The second is the organised or semi-organised sector consisting of much more complicated and technical manufacturing such as spinning, weaving, apparel, garments, etc. which apply modern machinery and techniques

Market Size

- The market for Indian textiles and apparel is projected to grow at a 10% CAGR to reach US\$ 350 billion by 2030. Moreover, India is the world's 3rd largest exporter of Textiles and Apparel. India ranks among the top five global exporters in several textile categories, with exports expected to reach US\$100 billion.
- The textiles and apparel industry contributes 2.3% to the country's GDP, 13% to industrial production and 12% to exports. The textile industry in India is predicted to double its contribution to the GDP, rising from 2.3% to approximately 5% by the end of this decade.
- Global apparel market is expected to grow at a CAGR of around 8% to reach US\$ 2.37 trillion by 2030 and the Global Textile & Apparel trade is expected to grow at a CAGR of 4% to reach US\$ 1.2 trillion by 2030.
- India's home textile industry is expected to expand at a CAGR of 8.9% during 2023-32 and reached US\$ 23.32 billion in 2032 from US\$ 10.78 billion in 2023.

Textiles and apparel exports from India (US\$ billion)



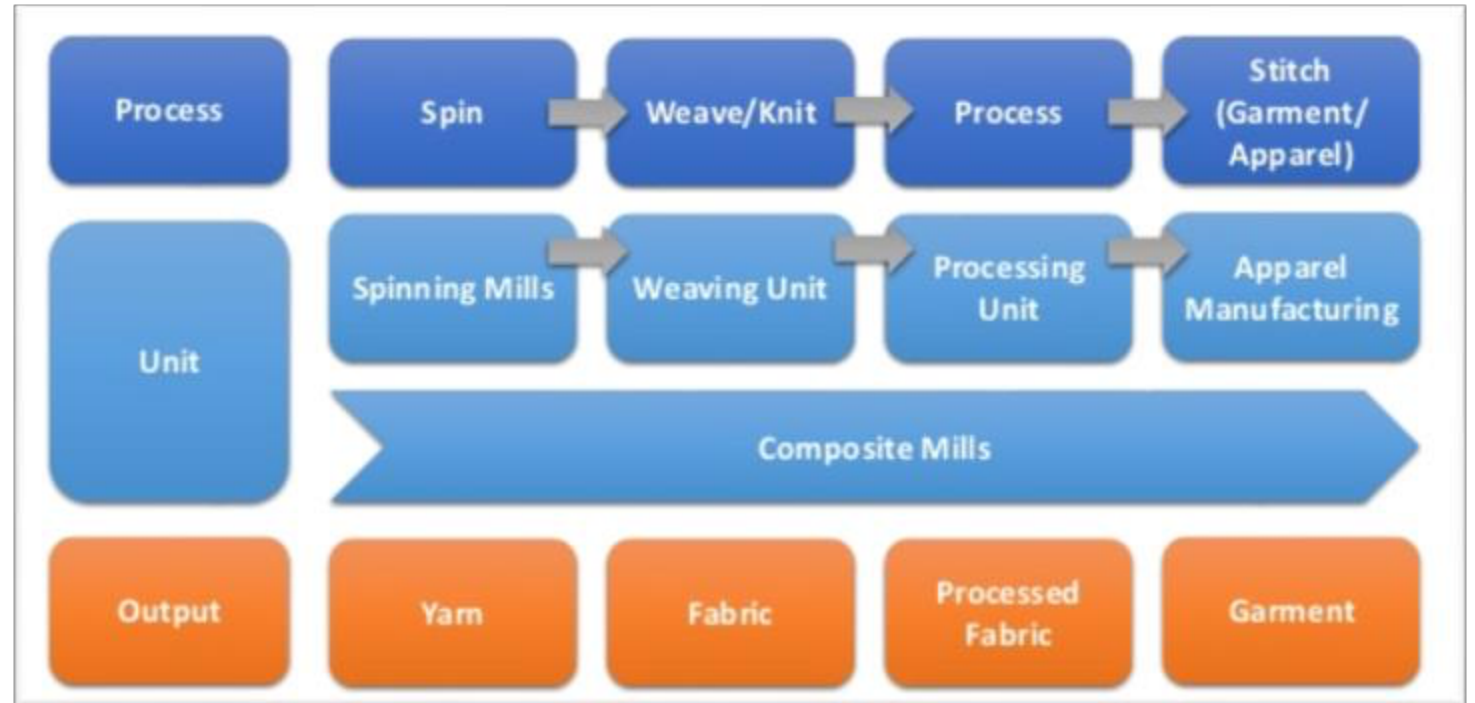
Source: Ministry of textiles

Investments & Key Developments in Textiles

- Total FDI inflows in the textiles sector stood at US\$ 4.47 billion between April 2000- March 2024.
- In August 2023, government has sanctioned the establishment of seven PM Mega Integrated Textile Region and Apparel (PM MITRA) Parks on Greenfield and Brownfield sites. These parks will feature world-class infrastructure, including plug-and-play facilities, with a total investment of Rs. 4,445 crore (US\$ 535 million) over a seven-year period, extending to 2027-28.
- Ministry of Textiles has sanctioned 19 research projects totalling approximately Rs. 21 crore (US\$ 2.52 million) across various domains of Technical Textiles under the National Technical Textiles Mission.
- DS Group's luxury menswear division, Brioni inaugurates its first boutique in India in November 2023.
- In November 2023, Reliance Foundation launched the first 'Swadesh' handicrafts store in Hyderabad, aimed at supporting and promoting Indian craftwork.
- Industry bodies to host the largest global mega textiles event, Bharat Tex 2024 from February 26-29, 2024, in New Delhi. According to Union Minister, Mr. Piyush Goyal, Bharat Tex 2024 Expo is a testament to India's commitment to becoming a global textile powerhouse.

Textile Value Chain

- In the above snapshot of the textile value chain, Tuni Textile Mills Ltd (TTML) fits under the weaving unit.
- We are not a composite unit, thereby, we buy yarn from spinning mills, dye the yarn, weave it, process it and supply to apparel manufacturers and brands like Raymond's, Siyaram's and Mafatlal to name a few.

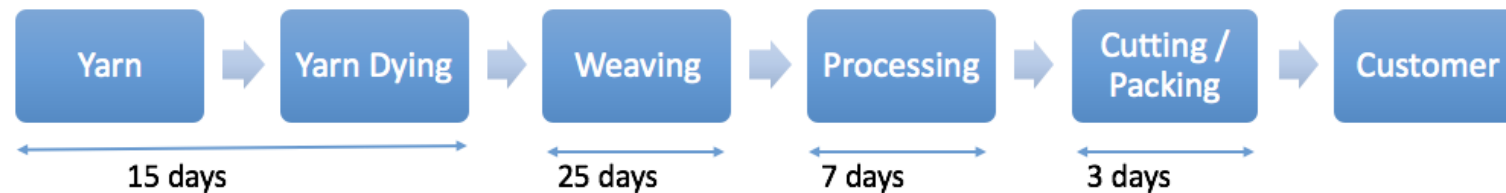


Key Players

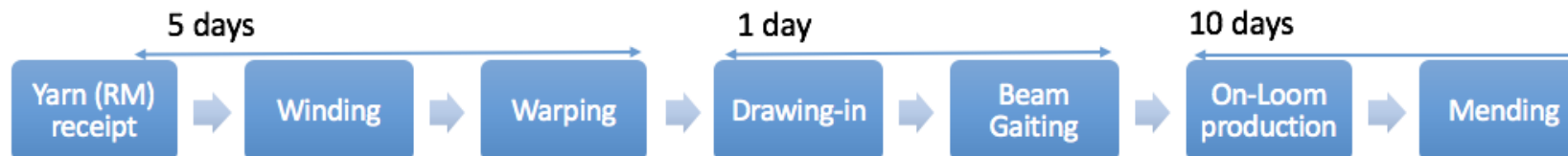
	Company	Business areas
	Welspun India Ltd	Home textiles, bathrobes, terry towels
	Vardhman Group	Yarn, fabric, sewing threads, acrylic fiber
	Alok Industries Ltd	Home textiles, woven and knitted apparel fabric, garments and polyester yarn
	Raymond Ltd	Worsted suiting, tailored clothing, denim, shirting, woollen outerwear
	Arvind Mills Ltd	Spinning, weaving, processing and garment production (denims, shirting, khakis and knitwear)
	Bombay Dyeing and Manufacturing Company Ltd	Bed linen, towels, furnishings, fabric for suits, shirts, dresses, saris in cotton and polyester blends
	Garden Silk Mills Ltd	Dyed and printed fabric

OUR VALUE CHAIN

We buy yarn from big mills like Reliance, Arvind, Ramalinga to name a few and send it on job-work for dying to Valson Industries, Siyaram Silk Mills Etc. After weaving, we put the fabric on job-work for processing, wherein the cloth is washed and smoothened for hand feel and luster. Finally, we cut and pack the material in rolls and send it to our customer.



The below diagram shows the operations that are performed in our weaving unit from the time the yarn is received and converted into fabric and sent to processing after quality check (mending).



B2B MARKETS THAT WE SERVE

1) **Corporate and School Uniform**

- a. We are a B2B manufacturer with tie up with local and large domestic uniform brands like Prabhu-G, Mafatlal and Vaaliji to name a few.
- b. The product range in corporate and school wear includes all kinds of plain sorts, twills, oxfords, herringbones, checks and stripes in various blends like 100% cotton, polyester cotton, polyester viscose, etc.
- c. Retail price for these fabrics are in the range of Rs. 100/meter to Rs. 300/meter.

2) **Fancy and Regular Wear**

- a. In this market we supply to Raymond's, Siyaram's and Donear to name a few.
- b. The product range in this market varies from customer to customer in terms of fancy innovative yarns, micro-cottons, dull-cottons, etc. with simple and sober designs.
- c. In this category, primary focus is on innovation and new product development.
- d. Retail price for these fabrics are in the range of Rs. 300/meter to Rs. 1000/meter.



CUSTOMER NEEDS

We directly belong to the fashion industry and in this age of “fast-fashion”, everything that is needed, was needed yesterday. Although we are not involved in mile end product & services, we need to be plugged in with the latest trends in fashion, colors and style. Being in the B2B business, it is crucial to know our customers customer. Emphasis today is on value addition, innovation and new product development. Our customers today, require a lot more from us than what they used to require a decade back.

We Believe that today manufacturing is an advantage only with a layer of service on top. Today, manufacturing activities are normal and manageable by operations staff. Superior service, exceptional client servicing and consistent quality promise are the rules of the game.

Our discerning customers’ need the following from us:

- 1) Computer Aided Designing
- 2) Prototype of fabric – called handlooms
- 3) Facility for Yardage / Sampling up to 50 meters of fabric
- 4) Color yarn inventory
- 5) On-time delivery
- 6) Research and Development- New products and innovations
- 7) Market Research, Market information and useful insights
- 8) Trend forecasting, color forecasting
- 9) Superior designing and technical expertise
- 10) Quick response time for new enquiries

Thank you



Tuni Textile Mills Ltd.