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Automation Across
Verticals Is the Need
of the Moment

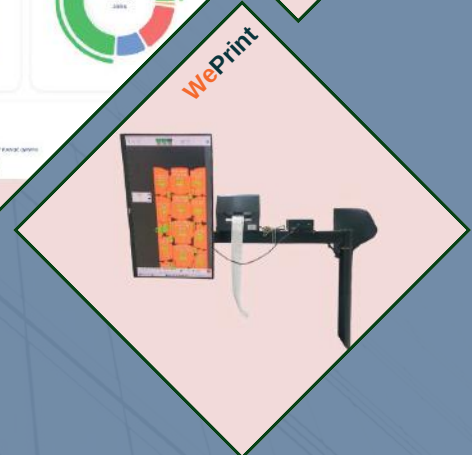
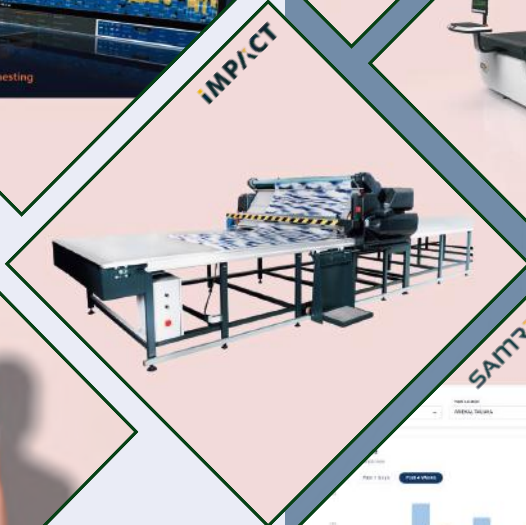
AEPC and Trichy
Customs Engage
Tiruppur Exporters in
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From Skepticism to
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Why Textile Manufacturing
Must Move from
Awareness to Action
Tze Ching Yeung

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CONTENTS

India's Apparel Exports at a Crossroads as Growth Meets Global Disruptions	4
Why Textile Manufacturing Must Move from Awareness to Action	6
Automation Across Verticals Is the Need of the Moment	12
Knit-Tech 2026 Reinforces Tiruppur's Position as a Global Technology Hub	16
Recycled Polyester versus Virgin Polyester: Are We Truly Making a Difference?	18
AEPC and Trichy Customs Engage Tiruppur Exporters in Trade Facilitation Outreach	22
Zero Defect, Zero Effect and the Growing Impact of ZED Certification on MSMEs	25
Biosynthetic Fibres and the Future of Fashion Beyond Polyester	28
From Skepticism to Insight A Meaningful Dialogue on India's Apparel Future	30
Digital Twin of a Fabric Roll	32
India's Textile Industry Emerging as a Partner for Sustainable Fashion	34
Made in EU Initiative Could Reshape Textile Sourcing and Strengthen Turkey's Role in European Supply Chains	36

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India's Apparel Exports at a Crossroads as Growth Meets Global Disruptions

India's Ready-Made Garment (RMG) export sector has once again demonstrated resilience in the face of an increasingly complex global trade environment. Even as geopolitical tensions, tariff pressures, and logistics disruptions continue to challenge global supply chains, the Indian apparel industry has sustained growth and signalled recovery momentum.

Recent export data underscores this dual reality: steady progress on the one hand and emerging uncertainties on the other, placing the sector at a critical inflexion point.

Steady Growth Signals Underlying Strength

India's RMG exports during the period April–January 2025–26 stood at USD 13,129.1 million, marking a growth of 1.6% over the corresponding period of the previous year. More significantly, exports registered a strong growth of 13.3% compared to April–January 2023–24, indicating a clear recovery trajectory over the past two years.

On a month-on-month basis as well, the sector showed encouraging signs. When compared to January 2024, exports in January 2025–26 increased by 7.2%, reflecting underlying demand strength and the industry's ability to adapt to evolving global dynamics.

This performance highlights the structural resilience of India's apparel sector, supported by a strong manufacturing base, diversified product offerings, and increasing global relevance. Despite short-term fluctuations, the broader trend indicates that the industry continues to move forward with stability and confidence.

Tariff Pressures and Market Volatility

However, the growth narrative has not been without challenges. The temporary decline in exports observed during January can largely be attributed to high tariff pressures in the United States, one of India's most important apparel markets.

These tariff barriers, combined with ongoing global economic volatility, have disrupted order flows and created uncertainty across key markets. Buyers have adopted cautious sourcing strategies, often delaying or redistributing orders in response to shifting cost dynamics.

Encouragingly, the tariff reduction announced on 7th February is expected to improve India's export competitiveness in the coming months. This development could help restore order flows and provide a much-needed boost to textile and apparel shipments, particularly in price-sensitive segments.

Emerging Geopolitical Risks in West Asia

Even as the industry looks forward to recovery, new geopolitical risks have emerged. The recent escalation in tensions following air strikes involving Israel, the United States, and Iran has introduced fresh uncertainties into the global trade landscape.

For India's textile and apparel sector, the implications are significant. West Asia accounts for nearly 13–14% of India's textile and apparel exports, making it a critical market for the industry.

The UAE, in particular, stands out as a key destination. With textile and apparel exports worth nearly ₹5,000 crore, the UAE ranks among the top markets for Indian exporters, following the United States, the European Union, and Bangladesh. Exports to other parts of West Asia contribute an additional ₹1,500 crore, underlining the region's strategic importance.

Any disruption in this corridor, whether due to geopolitical tensions, shipping delays, or cost escalations, can have a cascading impact on export volumes, delivery timelines, and overall trade confidence.

Polyester Segment Faces Cost Pressures

Among the various segments, polyester yarn is likely to be one of the most affected by the current developments. Unlike cotton, polyester is heavily dependent on petroleum-based inputs, making it highly sensitive to fluctuations in crude oil prices.

The production of polyester involves key raw materials such as para-xylene, which is processed into purified terephthalic acid (PTA) and ethylene glycol before being polymerised into fibre. Notably, PTA

accounts for nearly 85% to 90% of the input cost for one kilogram of yarn.

With geopolitical tensions influencing global oil markets, any increase in crude prices directly translates into higher raw material costs for polyester production. This, in turn, impacts pricing, margins, and competitiveness across the value chain—especially in export markets where cost sensitivity is high.

Freight Costs Surge Amid Shipping Disruptions

Compounding the challenges is the sharp rise in freight costs. Shipping disruptions linked to the West Asia crisis have led to significant increases in container rates, placing additional financial strain on exporters.

Freight charges, which were previously in the range of \$200–\$250 per container, have now surged dramatically. Major shipping lines have implemented steep hikes, with some increasing rates by \$1,500 to \$2,000 per container.

Reports indicate that companies such as Maersk have raised rates by nearly \$1,700 per container, while CMA CGM has increased charges by \$2,000 to \$3,000 per container for shipments to West Asia and beyond.

Such escalations not only erode exporter margins but also affect pricing competitiveness in international markets. For many exporters, especially MSMEs, these cost pressures can be particularly difficult to absorb.

Industry Calls for Policy Support

In light of these challenges, exporters have urged the government to introduce supportive measures to ease the burden. One key demand is the waiver of demurrage charges on export cargo, especially in cases where delays are caused by flight disruptions and logistical bottlenecks linked to the ongoing crisis.



Timely intervention in this regard could help mitigate losses, improve liquidity, and ensure smoother export operations during this period of uncertainty.

Navigating Uncertainty with Resilience

Despite the multiple headwinds, from tariff pressures and geopolitical tensions to rising input and logistics costs, the Indian apparel sector continues to demonstrate resilience.

The industry's ability to sustain growth, adapt to changing conditions, and maintain its presence in global markets speaks to its inherent strength and strategic importance. With supportive policy measures, improved trade conditions, and stabilisation of global dynamics, the sector is well-positioned to regain momentum.

At this critical juncture, the focus must remain on enhancing competitiveness, strengthening supply chains, and leveraging emerging opportunities. As global trade continues to evolve, India's apparel industry stands ready, not just to withstand disruptions but to emerge stronger in the global marketplace.

At this critical juncture, the focus must remain on enhancing competitiveness, strengthening supply chains, and leveraging emerging opportunities. As global trade continues to evolve, India's apparel industry stands ready, not just to withstand disruptions but to emerge stronger in the global marketplace.

More importantly, this phase calls for a strategic shift, from cost-driven competition to value-led positioning. Investments in MMF, sustainability, speed-to-market, and digital integration will define the next growth cycle. The players who adapt fastest to this new reality will not just survive volatility, but lead the future of global apparel sourcing.

Editorial Team

THE READINESS GAP :

Why Textile Manufacturing Must Move from Awareness to Action

EU sustainability regulations are reshaping global supply chains. The question is no longer whether change is coming — but whether the industry is prepared to respond.

By Tze Ching Yeung

For decades, the global textile industry has been defined by speed, scale, and efficiency. Supply chains expanded across continents, production costs were optimised, and manufacturing hubs such as India became essential engines of the global fashion economy.

Today, however, the rules of the game are beginning to change.

Sustainability regulation is moving from voluntary commitments to enforceable policy, and nowhere is this shift more visible than in the European Union. From Digital Product Passports to Extended Producer Responsibility, a new regulatory architecture is emerging that will reshape how textiles are designed, produced, traded and managed through its entire life cycle.

And yet, during numerous conversations with manufacturers, technology innovators, and supply-chain leaders over the past couple of years — from Portugal to East Africa, India, and Taiwan — a consistent pattern has been noted.

The industry knows change is coming.

But it is not behaving as if it is.

Awareness is growing. Urgency is not.

In management terms, this is a classic example of what Harvard Business School professor John Kotter describes as the urgency gap — the difference between recognising a challenge and mobilising an organisation to respond to it (Kotter, *Leading Change*, 1996).



This gap is noticeable throughout the industry but in textile manufacturing, that gap is becoming increasingly visible.

Regulation Is Moving — And It Will Affect Global Supply Chains

Europe has become the regulatory epicentre of the textile sector's sustainability transition.

In March 2022, the European Commission introduced the EU Strategy for Sustainable and Circular Textiles, setting a clear ambition: by 2030 textile products placed on the EU market should be durable, repairable, recyclable and largely made from recycled fibres (European Commission, 2022).

This vision is being implemented through several key regulatory frameworks.

One of the most significant is the Ecodesign for Sustainable Products Regulation (ESPR), which entered into force in July 2024. The regulation allows the European Commission to introduce sustainability performance and transparency requirements across product categories, including textiles (European Commission, 2024).

A central mechanism within ESPR is the Digital Product Passport (DPP) — a digital system designed to store and transmit information about a product's materials, environmental footprint, and lifecycle characteristics.

Sector-specific rules under this framework are expected to begin phased implementation from 2026 onwards.

At the same time, Extended Producer Responsibility (EPR) schemes are expanding across EU member states, shifting responsibility for managing textile waste onto producers and brands (European Environment Agency, 2024).

Taken together, these policies represent one of the most significant regulatory shifts the textile industry has experienced in decades.

And importantly, they will not only affect companies operating within Europe.

They will reshape expectations across the global supply chain.

Why Governments Are Acting

The urgency behind these policies is grounded in the scale of the textile industry's environmental footprint.

According to the European Environment Agency, EU countries generated approximately 6.94 million tonnes of textile waste in 2022, equivalent to around 16 kilograms per person (EEA, 2024).

Meanwhile, textile consumption continues to rise. The European Parliament reports that the average EU citizen purchased approximately 19 kilograms of textiles in 2022, reflecting the growth of fast-fashion consumption (European Parliament, 2023).

Globally, the textile industry generates an estimated 92 million tonnes of waste each year (Ellen MacArthur Foundation, 2017).

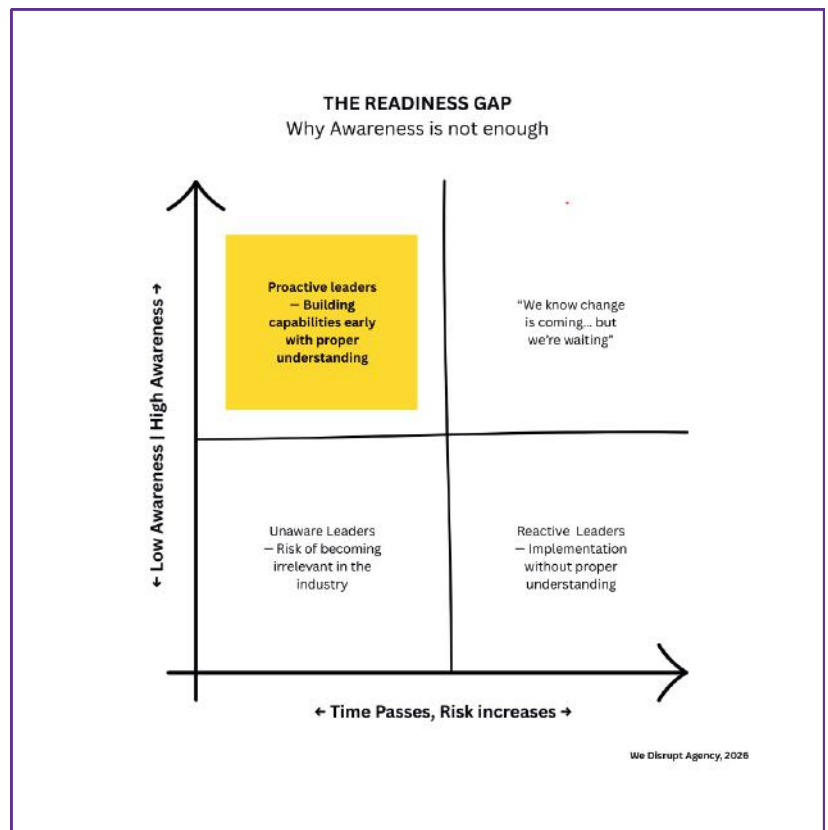
These figures illustrate the structural challenge policymakers are attempting to address: a production system built largely on a linear model of take, make, dispose.

The EU's regulatory response therefore aims not simply to reduce waste, but to redesign the system.

A Global Pattern: "Let's Wait and See"

Despite the clear direction of these impending regulations, the industry's response remains uneven.

Across manufacturing regions — whether established textile clusters in Europe or emergin



g production hubs in Africa and Asia — conversations with industry leaders often reveal a similar mindset.

Many still assume there is time.

Time for regulations to become clearer.

Time to see how competitors respond.

Time to wait for stronger signals from brands.

In strategy research, this behaviour is often described as strategic inertia — the tendency of organisations to delay action until change becomes unavoidable. Donald Sull of London Business School has written extensively about this phenomenon, describing how companies often fall into what he calls "active inertia": continuing familiar patterns of behaviour even when the external environment is shifting (Sull, Harvard Business Review, 1999).

In the textile sector, this pattern often appears in subtle ways.

Manufacturers acknowledge that Digital Product Passports are coming, but postpone investments in traceability systems until the final rules are published. Waste management practices remain largely unchanged while the industry waits for clearer circularity standards. Data systems are discussed internally, but implementation is delayed until buyers begin demanding them explicitly.

Each decision may appear reasonable in isolation.

After all, textile manufacturing operates under tight margins and complex operational pressures. Leaders must prioritise investments carefully.

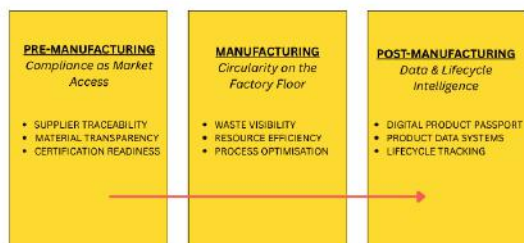
But taken together, these delays can accumulate into a strategic disadvantage. By the time regulatory frameworks are fully operational and brands begin enforcing new sourcing requirements, the companies that waited may find themselves rushing to build capabilities that others have already integrated into their operations.

Strategic inertia rarely feels like inaction. It often feels like prudence and cautiousness.

Yet history shows that industries rarely lose competitiveness because they ignore change completely. More often, they recognised it — but responded too slowly.

Textile manufacturing may now be approaching such a moment. “The biggest risk facing the textile industry today is not regulation — it is hesitation.”

A ROADMAP FOR TEXTILE MANUFACTURING READINESS READINESS IS BUILT ACROSS THE ENTIRE LIFECYCLE — NOT IN ISOLATION.



WE DISRUPT AGENCY, 2026

Innovation Is Accelerating — But in Silos

The textile sector is not lacking innovation.

Across the ecosystem, new technologies and initiatives are emerging faster than ever, in areas such as:

- fibre-to-fibre recycling technologies
- sustainable material development
- supply-chain traceability systems
- textile waste collection and sorting infrastructure
- digital product identification platforms

But these innovations are often developing independently of one another.

A recycling technology may not connect with production waste data.

A traceability platform may not integrate with factory operations.

Circular material initiatives may lack the digital infrastructure needed to verify them.

Recycled yarn may not be suitable for existing production infrastructure.

And more often than not, circular innovations are not connected to customer demand.

The result is fragmentation.

Instead of simplifying the transition to sustainable production, the industry risks creating an increasingly complex landscape of disconnected solutions.

Management thinker Peter Senge, in *The Fifth Discipline* (1990), described this challenge as a failure of systems thinking — when organisations attempt to solve complex problems through isolated interventions rather than understanding how different elements of a system interact.

The textile sector today provides a striking example of this phenomenon.

“Innovation is not the industry’s problem. Integration is.”

From Systems Thinking to Strategic Choice

What becomes clear from these observations is that the challenge facing textile manufacturing is not simply regulatory compliance.

It is strategic positioning.

The industry is entering a period where transparency, circularity, and data connectivity are becoming foundational capabilities rather than optional initiatives. Building these capabilities will require new coordination across supply chains, new digital infrastructures, and new ways of thinking about production systems.

But it also requires leadership willing to move ahead of certainty.

Industries that successfully navigate major transitions rarely wait for full clarity before acting. Instead, they recognise structural change early and begin building capabilities before the

Five Signals the Textile Industry Cannot Ignore

1. Regulation Is Becoming Structural

The EU Strategy for Sustainable and Circular Textiles and the Ecodesign framework indicate a long-term shift in how textile products entering the European market will be evaluated.

2. Product Data Will Travel With the Product

Digital Product Passports will require structured information about materials, production processes, and lifecycle impacts to accompany goods throughout their lifecycle.

3. Waste Is Moving From Liability to Resource

Extended Producer Responsibility schemes are pushing the industry toward circular material systems where textile waste becomes part of future production cycles.

4. Transparency Is Becoming a Sourcing Requirement

Brands are increasingly evaluating suppliers not only on cost and capacity but also on their ability to provide traceability and environmental data.

5. The Competitive Landscape Is Shifting

Manufacturers that develop these capabilities early may gain strategic advantages as brands seek partners capable of supporting regulatory compliance.

shift becomes unavoidable. Waiting for certainty rarely creates advantage; more often it compresses the time available for adaptation.

Organisations experiencing strategic inertia, often recognise shifts in their environment but delay meaningful change because existing routines feel safer than experimentation (Sull, Harvard Business Review, 1999). Well-known examples include Kodak and Blockbuster, both of which understood the technological disruption facing their industries but continued prioritising their existing business models until competitors had already reshaped the market.

In other words, organisations rarely fail because they cannot see change coming. They fail because they respond too late.

In this sense, the textile sector may now be approaching a strategic inflection point.

The technologies exist.

The policy direction is clear.

The market signals are beginning to emerge.

The remaining question is whether the industry will move proactively — or wait until change is forced upon it.

A Strategic Turning Point

The coming decade will likely redefine what competitiveness looks like in global textile manufacturing

For many years, competitive advantage in the sector was driven primarily by scale, efficiency, and cost optimisation. But the emerging regulatory environment suggests that a new set of capabilities is becoming equally important: traceability, transparency, circular production practices, and the ability to provide reliable product data across the supply chain.

Manufacturers that begin aligning their production systems with these expectations today may strengthen their position in international markets. They will have time to experiment, integrate systems gradually, and build the operational capabilities required to support evolving sourcing requirements.

Those that delay face a very different scenario.

Waiting often appears safe in the short term. But in practice it compresses the time available for adaptation. When regulations are fully implemented and buyer expectations become explicit, companies that have not prepared may find themselves forced into rapid and costly adjustments — retrofitting systems, integrating new technologies under pressure, and attempting to meet new requirements without the operational foundations already in place.

Rita McGrath describes this challenge in her work on strategic

inflection points, noting that organisations that delay adaptation often discover that the window for gradual transition has already closed (Seeing Around Corners, 2019).

By contrast, companies that begin building capabilities early can shape the competitive landscape rather than react to it.

For textile manufacturers supplying global markets, this distinction may prove decisive, as strategic leadership research consistently shows that competitive advantage rarely comes from reacting to change.

It comes from anticipating it.

What Comes Next: A Roadmap for Readiness

This article serves as the starting point for a practical three-part series exploring what readiness looks like across the manufacturing lifecycle.

The next articles will examine three critical phases of transformation:

Pre-Manufacturing — Compliance as Market Access

How traceability and supplier transparency are becoming prerequisites for global sourcing.
During Manufacturing — Circularity on the Factory Floor

Why waste visibility and resource efficiency will define the next generation of circular production systems.

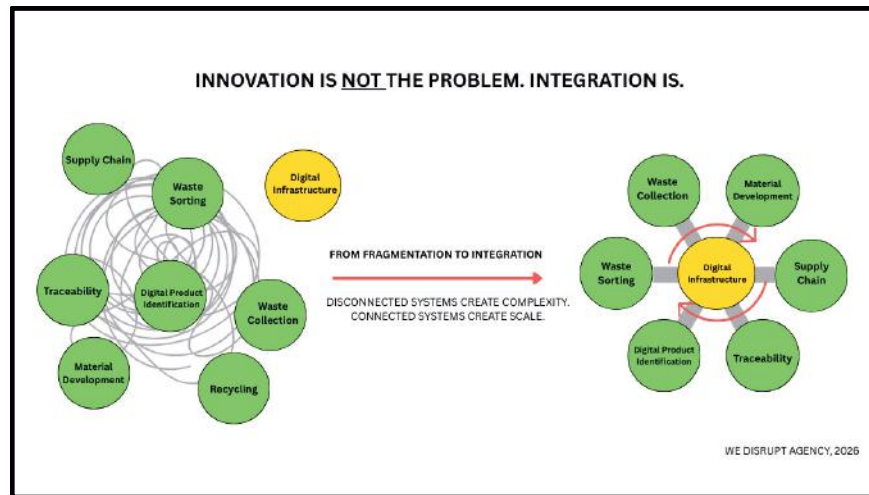
Post-Manufacturing — Data Readiness and Digital Product Passports

How structured product data will increasingly travel with goods throughout their lifecycle.

Together, these perspectives will outline a practical roadmap for manufacturers seeking not only to adapt to regulatory change — but to compete within it.

Because the real question facing the textile industry today is no longer whether transformation will happen.

It is whether the industry will be ready for it.



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Tze Ching Yeung is a sustainability strategist and systems builder working at the intersection of strategic leadership, circular resource flows, waste intelligence, and digital infrastructure in the textile industry. With nearly two decades of experience in brand strategy and sustainability innovation, she focuses on developing integrated solutions that enable traceability, circular material systems, and future-ready supply chains. Her work explores how better data, waste visibility, and demand creation can unlock scalable circularity across global textile ecosystems.

Tze Ching Yeung works with industry partners through We Disrupt Agency Limited and CIRKA AB to explore strategies that enable circular resource flows, waste visibility and future-ready textile supply chains.

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Automation must now begin where instability begins - at the process level.

Automation Across Verticals Is the Need of the Moment

In the AI age, labour shortage can no longer be managed with manpower alone

**By Deepak Siddharth
Technical Editor**

The real challenge is not only labour cost. It is labour dependency.

The knitwear industry has always grown under pressure – cost pressure, delivery pressure, quality pressure, and compliance pressure. What has now become sharper across factories is labour instability. The problem is no longer just wage inflation. It is shortage of people, shortage of skill, high attrition, inconsistent execution, and overdependence on a few experienced hands to keep critical processes under control.

That is why automation across all verticals has become the need of the moment. Not as a fashionable concept, and not as a branding line, but as a direct response to a structural production problem. A factory may have orders, machines, and demand for expansion, yet still become fragile if

every department depends too heavily on manual judgment and constant supervision.

“The problem is not only labour cost. The bigger problem is labour dependency.”

Knitting: stability has to begin here

Knitting is the starting point of quality. If defects are not controlled early, the consequences move downstream into processing, printing, cutting, and stitching. Yet in many factories, knitting performance still depends heavily on manual supervision and experience. That creates avoidable risk.

This is where automation has a clear role. Real-time efficiency monitoring, maintenance alerts, and AI-based auto-stop for defects can help arrest problems at the right moment instead of allowing defects to multiply further into the process chain.

- real-time machine efficiency visibility
- preventive maintenance alerts
- AI-based auto-stop for defects
- production tracking against plan
- better yarn and machine utilisation visibility



Process consistency now needs objective monitoring, not only experience-based control.

Dyeing and processing: consistency cannot depend only on experience

Dyeing and processing remain among the most sensitive departments in any textile operation. Small variations in recipe control, timing, chemistry, or handling can lead to major quality consequences. For years, many factories have depended heavily on experience-based control in this area. That model is becoming harder to sustain.

The stronger path is tighter automation and stronger measurement. Auto dosing, process standardisation, live batch tracking, and spectrophotometer-based colour consistency checkpoints are now critical if factories want repeatable shade control and lower reprocessing.

- recipe standardisation
- automated dosing and process control
- live batch monitoring
- spectrophotometer-based colour consistency checkpoints
- traceability across lots and batches

Printing: complexity is rising, so control must rise with it

Printing is one of the clearest examples of why automation matters now. Designs are becoming more complex, approvals are expected faster, and production

timelines are tighter. Whether the setup is screen, digital, or hybrid, the direction is the same: reduce manual dependency and improve repeatability.

The conversation should not be limited to speed. Speed without control only creates faster mistakes. The real gain comes from setup discipline, calibration consistency, registration support, production visibility, and AI-based defect detection.

- faster setup support
- better registration and calibration discipline
- colour workflow standardisation
- AI-based defect detection
- production analytics and smarter guidance for execution

“Speed without control only creates faster mistakes.”

Cutting and flow before stitching

Many garment issues that appear later actually begin earlier. Cutting accuracy, marker efficiency, bundle discipline, and internal flow all affect what happens in the sewing line. Automated spreading, cutting optimisation, and digital bundle tracking reduce confusion and lower dependence on supervision-heavy coordination.

Stitching: automation has to be process-specific

Stitching remains one of the most labour-sensitive and variation-prone departments in garment manufacturing. The right approach is not generic automation. It is process-specific automation and customisation based on garment type, process type, and production requirement, so tailors can work with better consistency and less avoidable variation.

Some operations need attachment automation. Some need folders and guides. Some need semi-automatic handling. Some need machine

modification and work-aid engineering based on the garment and process. Alongside this, a centralised system should monitor tailor efficiency line by line and process by process so management can identify imbalance, bottlenecks, and improvement opportunities quickly.

- process-specific machine customisation
- attachments, folders, and guides matched to garment type
- stronger consistency in tailor-intensive critical operations
- centralised efficiency monitoring across lines and processes

Planning, inventory, and internal coordination: the most ignored automation layer

Some of the biggest productivity losses in factories do not come from dramatic machine failures. They come from weak planning, unclear inventory visibility, delayed approvals, missing materials, and poor coordination between departments. This is where many factories silently lose profit every day.

Factories now need live inventory visibility, BOM-linked planning, process-stage tracking, shortage alerts, and centralised dashboards for status monitoring. In the AI age, data cannot remain trapped inside departments. It has to move through the factory like an operating system.

“The factories that win in the AI age will be the ones with the least dependency.”



Across knitting, dyeing, and garmenting, automation is no longer a machine-only conversation. It is a systems conversation.

Inspection and quality assurance: prevention matters more than correction

Manual inspection alone is no longer enough for scale. Fatigue affects attention, standards vary, and repetitive defect identification is exactly where vision systems can add practical value. AI-based defect detection can help identify recurring problems earlier, classify defect patterns, and create useful production feedback loops.

- camera-based defect capture
- AI-based defect detection and classification
- live alerts for abnormal rejection trends
- defect mapping by process, machine, style, or shift

Conclusion

Automation in textiles is no longer about showing that a factory is modern. It is about making the factory more stable, more measurable, and less fragile. Knitting needs smarter control. Dyeing needs tighter measurement. Printing needs higher repeatability and AI-based defect detection. Stitching needs process-specific automation and centralised efficiency monitoring. Inspection needs intelligent visibility. Planning and inventory need connected systems.

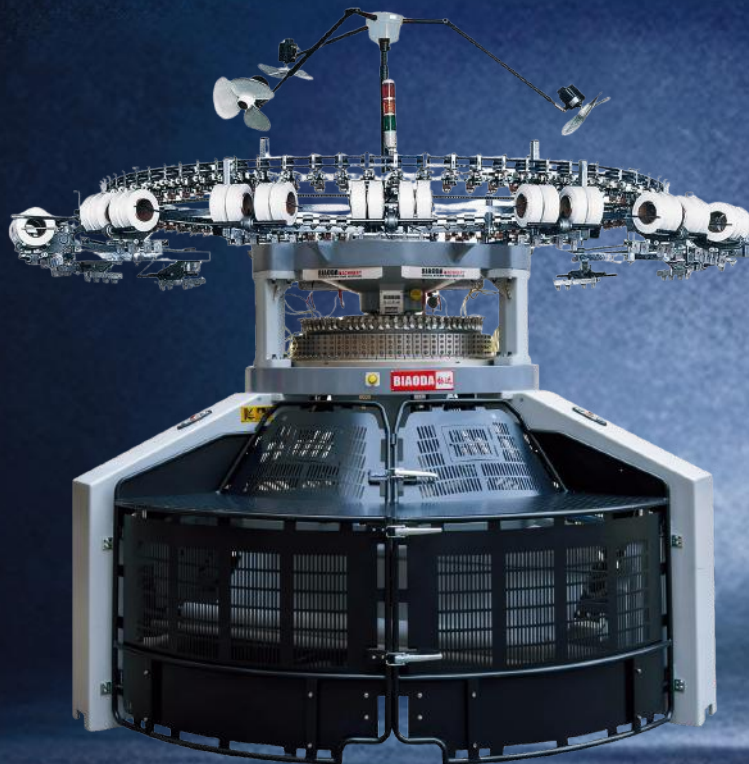
That is the direction forward. Not because it sounds advanced, but because labour shortage and production complexity have made it necessary.

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KNIT-TECH 2026 REINFORCES TIRUPPUR'S POSITION AS A GLOBAL TECHNOLOGY HUB

Knit-Tech 2026, the 18th edition of the International Knitting Technology Exhibition, held from 6–9 March 2026 at the Hi-Tech Tiruppur Exhibition Centre, successfully brought together global technology providers and the Tiruppur garment manufacturing ecosystem. The event once again reinforced its position as a key platform driving technology adoption, collaboration, and business growth in the textile and apparel sector.

The exhibition showcased a comprehensive range of technologies across the knitted garment value chain, including knitting machinery, dyeing and

finishing systems, compacting technologies, CAD/CAM solutions, embroidery, printing, sewing machinery, textile chemicals, and accessories. A major highlight was the live machinery demonstrations, which enabled manufacturers to assess real-time performance and make informed investment decisions.

Strong Participation and Business Impact

Knit-Tech 2026 witnessed strong participation, reflecting the growing importance of innovation in the industry. The event recorded 26,740 visitors, 220 exhibitors, and 350 stalls, with participation from 14 countries. A total of 126 live demonstrations were conducted, and the exhibition generated an estimated business value of ₹860 crore, underlining its commercial impact.

The event attracted a diverse audience, including garment manufacturers, knitting and processing units, export houses, buying agents, and textile technologists. The strong turnout from Tiruppur and the surrounding regions further highlighted the exhibition's relevance to the core industry cluster.



Beyond technology display, Knit-Tech served as a powerful platform for business networking and collaboration. Exhibitors reported high-quality interactions with both existing clients and new prospects. Post-event feedback revealed that 92% of exhibitors were satisfied with visitor quality, while many generated strong leads and confirmed participation for future editions.

Knowledge Sharing and Future Outlook

A key highlight of the exhibition was the Yi - Knit-Tech Learning Conclave, organised in collaboration with Young Indians. Sessions covered critical topics such as:

- AI and automation in textile manufacturing
- US and EU trade tariff developments
- Sustainability in textile production

The panel discussion on sustainability,

featuring leading industry experts, provided valuable insights into the challenges and opportunities in building environmentally responsible manufacturing systems.

The conclave not only facilitated knowledge exchange but also encouraged dialogue between industry leaders, policymakers, and young professionals—an essential step toward building a future-ready textile ecosystem.

Exhibitor feedback further underscored the event's success, with many participants appreciating the quality of engagement and organisation. The participation of students and young professionals also reflected growing interest in textile technology and innovation.

Knit-Tech 2026 once again highlighted Tiruppur's strategic importance as a global knitwear hub. By connecting international technology providers with local manufacturers, the exhibition strengthened the industry's ability to adopt advanced production solutions and remain competitive in global markets.

As the textile industry evolves, driven by sustainability, automation, and efficiency, platforms like Knit-Tech play a crucial role in shaping its future. Building on the success of this edition, the next Knit-Tech in 2028 is expected to witness even greater participation and technological advancements.

N. KUMARAN



RECYCLED POLYESTER VERSUS VIRGIN POLYESTER: ARE WE TRULY MAKING A DIFFERENCE?

Over the past decade, the global textile and apparel industry has intensified its search for more sustainable materials. Among the most widely promoted solutions is recycled polyester, commonly referred to as rPET. Brands, retailers, and manufacturers have embraced recycled polyester as a responsible alternative to virgin polyester, highlighting its role in reducing plastic waste and lowering dependence on fossil resources.

But beyond the marketing narratives, an important question remains: are we truly making a meaningful environmental difference, or are we simply shifting the conversation without addressing the core issue?

To answer this question, it is essential to examine the science and data behind polyester fibres rather than relying solely on sustainability claims.

Understanding Polyester: Virgin vs Recycled

Polyester, whether virgin or recycled, is fundamentally the same material: polyethylene terephthalate (PET). Virgin polyester is produced from petrochemicals derived from fossil fuels. Recycled polyester, on the other hand, is typically manufactured by processing post-consumer plastic waste, most commonly PET bottles, into new fibres.

However, the fundamental chemical structure of the fibre does not change. Both virgin and recycled polyester remain synthetic polymers, and both exhibit similar behaviour throughout their lifecycle.

The Microplastic Challenge

One of the most pressing environmental concerns associated with synthetic fibres is the release of microplastics.

When polyester garments are worn, washed, or subjected to friction during use, microscopic fibres, known as microfibrils, can shed from the fabric. These tiny particles often pass through wastewater treatment systems and ultimately enter rivers, oceans, and ecosystems.

Scientific research published in several peer-reviewed studies has demonstrated that microfibre shedding is influenced primarily by yarn structure, fabric construction, and finishing processes, rather than by whether the fibre originates from virgin or recycled polymer.

In other words, a recycled polyester garment does not necessarily shed fewer microplastics than a garment made from virgin polyester.

This means that while recycled polyester may offer certain environmental benefits, it does not eliminate the microplastic challenge associated with synthetic textiles.

Where Recycled Polyester Does Make a Difference

Despite these limitations, recycled polyester still contributes to sustainability in several important ways.

First, it reduces dependence on fossil-based raw materials. Virgin polyester production relies heavily on petroleum-derived inputs, whereas recycled polyester utilizes existing plastic resources.

Second, it diverts plastic waste from landfills and oceans, at least at the upstream stage. By converting used plastic bottles into textile fibres, the industry creates a secondary lifecycle for materials that would otherwise become environmental pollutants.

Third, recycled polyester typically requires less energy during production compared to virgin polyester manufacturing, depending on the recycling process used.

These advantages should not be dismissed. They represent



meaningful steps toward reducing the environmental footprint of textile production.

However, it is equally important to recognise that these benefits occur primarily before the garment reaches the consumer. Once the product enters the use phase, during washing, wearing, and disposal, the environmental behaviour of recycled polyester closely resembles that of virgin polyester.

The Gap Between Perception and Measurement

The growing popularity of recycled materials has created a powerful narrative within the fashion industry. Garments labelled “made from recycled polyester” are often perceived by consumers as inherently sustainable.

Yet sustainability in textiles cannot be defined by a single attribute.

This raises a crucial distinction between perceived sustainability and measurable sustainability.

Perceived sustainability refers to claims that resonate with consumers and communicate environmental responsibility, often through labels or marketing messages.

Measurable sustainability, on the other hand, requires objective analysis based on lifecycle assessments, material science, and environmental impact data.

While recycled polyester performs well in certain metrics, such as resource conservation, it does not solve all environmental challenges associated with synthetic textiles.

Recognising this distinction is vital for an industry that increasingly faces scrutiny over transparency and accountability.

Structural Solutions vs Communicable Improvements

The debate surrounding recycled polyester ultimately leads to a deeper question: Are we focusing on structural solutions, or simply on improvements that are easier to communicate?

Structural solutions address the root causes of environmental impact. In the context of textiles, this may involve:

- Developing new fibre technologies that reduce or eliminate microfibre shedding
- Improving yarn and fabric construction to minimise fibre release

- Designing garments for durability and extended lifecycle
- Investing in advanced recycling technologies capable of true fibre-to-fibre recycling
- Exploring biodegradable or bio-based materials

Communicable improvements, by contrast, are changes that are easier to explain and market to consumers, such as switching from virgin to recycled inputs.

While these improvements have value, they should not be mistaken for comprehensive solutions.

The Role of Responsible Design

One of the most effective ways to address microfibre shedding lies in responsible textile design.

Research indicates that tightly constructed fabrics, continuous filament yarns, and carefully engineered finishing processes can significantly reduce fibre release. By prioritising design and engineering at the manufacturing stage, producers can mitigate environmental impact without relying solely on material substitution.

This approach highlights the importance of collaboration between fibre producers, fabric manufacturers, garment designers, and testing laboratories.

Sustainability is not the responsibility of a single stakeholder; it is a collective challenge across the entire value chain.

The Importance of Testing and Data

Objective testing and scientific evaluation must play a central role in the ecological transition of textiles.

Advanced testing methods allow manufacturers to measure microfibre release, assess fabric durability, and evaluate environmental performance more accurately. These tools enable informed decisions based on data rather than assumptions.

For industry professionals working closely with fibres and fabrics, this evidence-based approach is essential. Without rigorous testing, sustainability risks become a marketing exercise rather than a measurable goal.

Moving Beyond a Single Solution

The future of sustainable textiles will not depend on a single material innovation. Instead, it will require a combination of strategies, including:

- responsible material sourcing
- intelligent product design
- improved recycling systems
- technological innovation in fibre development
- and greater transparency across supply chains

Recycled polyester represents one piece of this broader puzzle. It contributes to waste reduction and resource efficiency, but it does not represent a complete environmental solution.

A Call for Honest Conversations

As the textile industry moves toward a more sustainable future, honest conversations about materials and their limitations become increasingly important.

Progress will depend on the willingness of brands, manufacturers, researchers, and consumers to look beyond simplified narratives and examine the full lifecycle of textile products.

Recycled polyester is a step forward, but it is not the final destination.

If the industry truly seeks to reduce its environmental footprint, the focus must shift from isolated improvements to systemic change driven by innovation, transparency, and science-based decision-making.

Only then can sustainability move beyond marketing claims and become a measurable reality for the global textile and apparel sector.

Dr. Jane Sheeba





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AEPC AND TRICHY CUSTOMS ENGAGE TIRUPPUR EXPORTERS IN TRADE FACILITATION OUTREACH

In a significant initiative aimed at strengthening trade facilitation and improving communication between exporters and regulatory authorities, the Apparel Export Promotion Council (AEPC), in association with the Trichirappalli Customs Commissionerate, Preventive Zone, organised a Trade Outreach Programme for exporters in Tiruppur.

The programme focused on creating awareness about key Customs facilitation schemes such as the Authorized Economic Operator (AEO), Manufacture and Other Operations in Warehouse Regulations (MOOWR), and the Self-Sealing Procedure (SSP). The event also highlighted improvements to the Thunaivan Exporters' Facilitation Portal, an online platform designed to streamline grievance redressal and enhance interaction between exporters and Customs authorities.

Focus on Trade Facilitation

Shri Bharat Prakash, IRS, Commissioner of Customs, Trichy Customs Preventive Zone, Tiruchirappalli, attended the programme as the Chief Guest and engaged directly with exporters to discuss various initiatives undertaken by Customs to support the export community.

Delivering the welcome address, Dr A. Sakthivel, Chairman of the Apparel Export Promotion Council (AEPC), welcomed the Customs officials and members of the exporting community. He highlighted that Shri Bharat Prakash had previously served with the Ministry of Micro, Small and Medium Enterprises (MSME) in New Delhi, giving him valuable exposure to the challenges faced by small and medium enterprises.

Dr Sakthivel noted that this experience is particularly relevant to Tiruppur, where nearly 99 per cent of industrial units belong to the MSME sector. He expressed confidence that the Commissioner's understanding of MSME dynamics would help further strengthen trade facilitation efforts in the region.

Thunaivan Portal Strengthening Industry–Customs Interface

During his address, Dr Sakthivel appreciated the proactive initiatives undertaken by the Customs department, particularly the introduction

of the Thunaivan Portal. The portal has significantly improved the communication mechanism between exporters and Customs authorities by providing a structured platform to raise and resolve operational issues.

He observed that exporters in the region have not faced major Customs or GST-related issues in recent years, largely due to the responsive administration and effective grievance redressal mechanisms put in place by the authorities.

Encouraged by the success of the Thunaivan Portal in Tiruppur, AEPC has requested the Customs department to consider replicating the model in other major export hubs such as Delhi and Mumbai. Dr Sakthivel expressed hope that wider adoption of such platforms would further strengthen trade facilitation across the country.

He added that the outreach programme was organised specifically to increase awareness among exporters regarding important Customs initiatives such as AEO, MOOWR, SSP, and the Thunaivan Portal, enabling them to take full advantage of these schemes for smoother export operations.

Tiruppur's Strategic Role in India's Exports

Addressing the gathering, Shri Bharat Prakash, IRS, Commissioner of Customs, highlighted Tiruppur's significant contribution to India's export economy. He noted that nearly 70 per cent of the country's knitwear exports originate from the Tiruppur cluster, making it one of the most important apparel export hubs in the country.

The Commissioner pointed out that global trade is currently undergoing significant changes, with new trade agreements and shifting market dynamics creating both opportunities and challenges for exporters. In this evolving environment, Customs authorities remain committed to supporting exporters through simplified procedures, faster clearances, and proactive engagement.

He encouraged exporters to make greater use of facilitation initiatives such as the AEO, SSP, and MOOWR schemes, which are designed to reduce compliance burdens and improve operational efficiency.

Shri Bharat Prakash also informed the gathering that a Trade Facilitation Centre (TFC) would soon be established in Tiruchirappalli. The centre will provide exporters with guidance on customs procedures and regulatory requirements, thereby strengthening the overall support ecosystem for the export community.

He concluded by thanking Dr. A. Sakthivel, AEPC, and the Tiruppur Exporters' Association (TEA) for organising the programme, noting that such initiatives help foster constructive dialogue between industry and government agencies.



Detailed Presentations on Customs Schemes

During the technical sessions, Customs officials presented detailed information about key schemes designed to facilitate exports.

The Authorized Economic Operator (AEO) programme was explained as a trust-based initiative that offers several facilitation benefits to compliant exporters, including reduced inspections and faster cargo clearance.

The Manufacture and Other Operations in Warehouse Regulations (MOOWR) scheme enables manufacturers to operate within bonded warehouses while deferring import duties. This provides exporters with greater operational flexibility and improved cash flow management.

Officials also explained the Self-Sealing Procedure (SSP), which allows exporters to seal containers at their factory premises before dispatching them to ports or container freight stations. This reduces logistical delays and streamlines the export process.

Thunaivan Portal Performance

Mr Niranjan, Inspector of Customs, presented the functioning and achievements of the Thunaivan Portal. According to the data shared during the programme, a total of 510 grievances have been received through the portal. Of these, 435 grievances have been successfully resolved, while 47 cases are currently under process, and 28 cases are pending with exporters awaiting additional details.

The total value involved in the grievances registered through the portal amounts to ₹2.08 crore. With the resolution of 435 grievances, a sum of ₹1.61 crore has already been credited back to exporters.

Several exporters present at the programme also shared their positive experiences with the portal, highlighting its effectiveness in resolving operational issues quickly.

Interactive Session with Exporters

An open interaction session was conducted towards the end of the programme, providing exporters with an opportunity to raise practical concerns and seek clarification from Customs officials.

Discussions included issues arising from the ongoing Middle East crisis and its impact on international trade flows. Exporters also shared their expectations from Customs authorities in ensuring smoother export operations during uncertain global conditions.

Participants raised concerns regarding operational challenges encountered on the ICEGATE portal, certain matters relating to the Directorate General of Systems, and the issuance of show cause notices related to the submission of electronic Bank Realisation Certificates (e-BRC).



Shri Bharat Prakash, along with Shri Vijay Krishna Velavan, IRS, Additional Commissioner of Customs, and Shri Umesh Rathod, IRS, Joint Commissioner of Customs, addressed the queries raised by exporters and assured them of continued support.

During the discussion, Mr V. Elangovan, EC Member of AEPC and Vice President of TEA, highlighted the issue of long queues of trucks waiting at Container Freight Stations (CFS) for unloading export consignments and requested appropriate facilitation measures to address the bottleneck.

Industry Participation

The programme witnessed active participation from key representatives of the apparel exporting community.

Among the prominent attendees were Mr. V. Elangovan, EC Member, AEPC and Vice President of TEA; Mr. Gopalakrishnan, EC Member, AEPC and Treasurer, TEA; Mr. R. Ramu, AEPC Committee Member; Mr. Kumar Duraisamy, Joint Secretary, TEA; Mr. Anand, Joint Secretary, TEA; Shri Vijay Krishna Velavan, IRS, Additional Commissioner of Customs, Trichy; Shri Umesh Rathod, IRS, Joint Commissioner of Customs, Trichy; and Shri Unni, IRS, Assistant Commissioner of Customs, ICD Tiruppur.

Executive Committee members from AEPC and TEA, along with representatives from the apparel exporting industry, also participated in the event.

Commitment for Continued Engagement

The outreach programme served as a valuable platform for exporters to gain clarity on important Customs schemes, raise operational concerns, and receive direct guidance from Customs authorities.

Both industry representatives and Customs officials emphasised the importance of continued dialogue and collaboration to strengthen India's export ecosystem.

The session concluded with a commitment to organise follow-up discussions and review meetings to address specific operational challenges and implement suggestions raised during the programme, thereby facilitating smoother export operations for the apparel sector. The vote of thanks was delivered by Mr Kumar Duraisamy, Joint Secretary of the Tiruppur Exporters' Association (TEA).

N. KUMARAN



ZERO DEFECT, ZERO EFFECT AND THE GROWING IMPACT OF ZED CERTIFICATION ON MSMES

India's Micro, Small and Medium Enterprises (MSMEs) form the backbone of the country's industrial ecosystem. Across sectors such as textiles, engineering, food processing and electronics, MSMEs play a critical role in manufacturing, employment generation and exports. Recognising the importance of strengthening this sector, the Government of India introduced the Zero Defect Zero Effect (ZED) Certification Scheme to help MSMEs enhance quality standards while adopting environmentally responsible manufacturing practices.

The ZED initiative, implemented by the Ministry of MSME in collaboration with the Quality Council of India, aims to guide enterprises toward producing high-quality products with minimal environmental impact. By encouraging better manufacturing practices, efficient resource utilisation and improved management systems, the programme seeks to make Indian MSMEs more competitive in global markets.

Understanding the ZED Philosophy

The ZED concept is built around two key principles. The first, "Zero Defect," focuses on producing goods that meet global quality standards with minimal defects. The second, "Zero Effect," emphasises reducing the environmental impact of manufacturing processes.

In today's international marketplace, buyers are not only concerned about product quality but also about how those products are made. Environmental responsibility, energy efficiency and responsible use of resources have become key considerations for global brands and retailers. The ZED framework, therefore, encourages MSMEs to align their operations with these expectations while strengthening product reliability.

Why ZED Matters for MSMEs

India is home to millions of MSMEs that contribute significantly to the country's industrial output and export performance. Despite their importance, many small enterprises operate with limited access to advanced technology, structured quality

management systems and environmental management practices.

The ZED certification programme helps address these gaps by providing a structured framework for improvement. Through self-assessment and professional evaluation, enterprises are guided to review their production systems, quality processes, safety standards and environmental practices.

The aim is not only to obtain certification but also to encourage a continuous improvement culture within the organisation. By adopting better systems and processes, MSMEs can improve efficiency, reduce operational risks and enhance product consistency.

Certification Levels and Progressive Improvement

The ZED certification framework follows a progressive structure designed to support gradual improvement. Enterprises can begin with the Bronze level certification, which focuses on establishing basic operational and quality standards. As companies strengthen their systems and processes, they can move toward Silver and Gold certification levels, reflecting higher degrees of operational excellence and sustainability.

This step-by-step approach makes the programme accessible even for smaller enterprises that may be at an early stage of process development. Instead of imposing complex requirements immediately, the framework allows businesses to gradually upgrade their capabilities.

Government Support and Incentives

To encourage MSMEs to participate in the programme, the government provides financial support and incentives. Enterprises enrolling under the scheme receive a joining reward that helps cover the cost of the initial certification stage. Additional subsidies are available for product testing, system certification and technology upgradation.



Such support is particularly important for small enterprises that may otherwise hesitate to invest in quality certification or process improvements due to financial constraints. By reducing these barriers, the scheme enables a larger number of MSMEs to adopt internationally recognised standards.

Enhancing Competitiveness Through Better Processes

One of the most valuable outcomes of the ZED framework is its focus on improving operational efficiency. When enterprises systematically review their processes, they often identify opportunities to reduce waste, optimise resource use and improve production planning.

Better process management can lead to several benefits. Product quality becomes more consistent, operational costs are reduced, and delivery performance improves. These improvements directly strengthen the competitiveness of MSMEs in both domestic and international markets.

For export-oriented industries, such improvements are especially critical. Buyers prefer suppliers who can demonstrate reliable quality standards, efficient manufacturing systems and responsible environmental practices.

Relevance for the Textile and Apparel Sector

The textile and apparel industry, particularly clusters such as Tiruppur, is dominated by MSME units involved in knitting, dyeing, processing and garment manufacturing. In recent years, global brands sourcing from these clusters have increased their expectations regarding quality control, sustainability and compliance.

Adopting the ZED framework can help textile MSMEs align with these evolving global requirements. The programme encourages practices related to resource efficiency, energy management, waste reduction and systematic quality control, areas that are directly relevant to textile manufacturing operations.

For garment exporters, improving these aspects can strengthen their credibility with international buyers and open doors to new markets.

CERTIFICATION SCHEME



Building a Culture of Continuous Improvement

Beyond certification, the long-term value of the ZED initiative lies in promoting a culture of continuous improvement. Instead of viewing quality management and environmental responsibility as regulatory obligations, enterprises are encouraged to integrate these principles into their everyday operations.

When organisations adopt this mindset, quality and sustainability become part of the company culture. Employees become more conscious about efficiency and resource utilisation, management decisions become more data-driven, and businesses become better prepared to respond to changing market expectations.

Over time, this transformation helps enterprises become more resilient and adaptable in a rapidly evolving global industry



Supporting India's Manufacturing Vision

India's ambition to become a global manufacturing hub depends significantly on the strength of its MSME sector. Initiatives like the ZED certification programme aim to build this strength by improving quality standards and promoting sustainable production practices.

By encouraging MSMEs to adopt globally recognised standards, the programme supports the broader goal of enhancing India's manufacturing reputation. Enterprises that consistently deliver high-quality products while maintaining environmental responsibility are better positioned to compete in international markets.

For industrial clusters like Tiruppur, where thousands of MSMEs contribute to the global apparel supply chain, embracing the principles of Zero Defect and Zero Effect can help reinforce the region's reputation as a reliable and responsible manufacturing hub.

As global markets continue to evolve and sustainability expectations increase, the ZED initiative provides a practical roadmap for MSMEs seeking to build stronger, more competitive and future-ready businesses.

Dr. Jane Sheeba



BIOSYNTHETIC FIBRES AND THE FUTURE OF FASHION BEYOND POLYESTER

The global fashion industry has increasingly embraced the language of sustainability. Terms such as “eco-friendly,” “green fashion,” and “sustainable textiles” are now widely used across marketing campaigns, brand messaging, and product labels. Consumers are becoming more conscious of environmental impact, and companies are responding by promoting materials that claim to reduce environmental harm.

However, beneath this growing narrative lies a more complex reality. A significant portion of garments marketed as sustainable are still made from polyester, a fibre derived from petroleum-based plastics. Even when polyester is recycled, it remains fundamentally the same synthetic polymer. While recycled polyester helps reduce the use of virgin fossil resources and diverts plastic waste from landfills, it does not eliminate one of the major environmental challenges associated with synthetic textiles, microplastic pollution.

The Hidden Problem of Microfibres

Polyester is valued in the textile industry for several reasons. It is durable, lightweight, resistant to wrinkles, and capable of delivering performance features such as stretch and moisture management. These qualities have made polyester one of the most widely used fibres in modern apparel, particularly in sportswear, performance garments, and everyday clothing.

Yet the environmental consequences of polyester extend beyond its production

stage. During regular wear and especially during washing, polyester fabrics release tiny synthetic fibres known as microplastics. These microscopic particles often pass through wastewater treatment systems and eventually enter rivers, oceans, and soil ecosystems.

Over time, these fibres accumulate in the environment and have been detected in marine life, drinking water, and even the human body. As awareness of microplastic pollution grows, the textile industry is increasingly being asked to address the role that synthetic fibres play in this global issue.

Recycling polyester does help reduce reliance on fossil fuels and can extend the life of existing plastic materials. However, recycled polyester behaves in much the same way as virgin polyester when it comes to fibre shedding. The microplastic problem, therefore, remains largely unresolved.

Rethinking the Future of Textile Materials

As sustainability expectations rise, the industry is beginning to explore alternatives that move beyond traditional petroleum-based fibres. One of the most promising areas of innovation is the development of biosynthetic materials, often referred to as biosynthetics.

Unlike conventional synthetics, which are derived from fossil fuels, biosynthetics are produced using renewable biological resources. These may include plant-based feedstocks such as sugar or corn, as well as advanced materials created through biotechnology, including lab-grown proteins.

The objective of these innovations is not simply to create another fibre option, but to replicate the performance characteristics that have made polyester so successful in the first place. Manufacturers are seeking materials that can deliver the same durability, flexibility, moisture management, and lightweight comfort that modern consumers expect from performance fabrics.

At the same time, the goal is to reduce the environmental impact associated with plastic-based fibres.

The Promise of Biofabrication

Advances in biotechnology and material science are making this vision increasingly feasible. Through processes known as biofabrication,

scientists and engineers are able to create new types of fibres using biological systems rather than petrochemical processes.

For example, certain biosynthetic materials are developed using microorganisms that convert plant-based sugars into polymer structures capable of forming textile fibres. Others rely on engineered proteins, such as collagen or silk-like molecules, that can be grown in controlled laboratory environments and then processed into yarns.

These emerging materials have the potential to combine the performance advantages of synthetic textiles with improved environmental compatibility. In some cases, biosynthetic fibres are designed to biodegrade more safely under natural conditions, reducing the persistence of plastic pollution in ecosystems.

Equally important, many of these materials aim to minimise or eliminate the release of persistent microplastics during the use phase of garments.

Early Stages of a New Material Revolution

Despite their promise, biosynthetic fibres are still in the early stages of development and adoption. Several challenges must be addressed before these materials can be widely integrated into global textile supply chains.

Cost remains one of the most significant barriers. Producing advanced biosynthetic materials often involves sophisticated biotechnology processes that are currently more expensive than conventional fibre manufacturing. Scaling these technologies to meet the massive demand of the global apparel industry will require significant investment and infrastructure development.

Another challenge lies in integrating new fibres into existing textile manufacturing systems. Spinning, knitting, dyeing, and finishing processes have been optimised for traditional materials such as cotton,

polyester, and nylon. Adapting these processes to new biosynthetic fibres will require collaboration between material scientists, textile manufacturers, and machinery suppliers.

Nevertheless, the direction of innovation is becoming increasingly clear. As research progresses and production technologies mature, biosynthetic fibres may gradually become more commercially viable.

Implications for the Textile Industry

For the textile and apparel industry, the emergence of biosynthetic materials represents both an opportunity and a challenge. On one hand, these innovations offer the possibility of reducing reliance on fossil-based resources and addressing the environmental concerns associated with microplastic pollution.

On the other hand, the transition to new materials will require adjustments throughout the supply chain. Fibre producers, yarn manufacturers, fabric mills, and garment producers will all need to adapt to evolving technologies and market expectations.

Industrial clusters such as Tiruppur, which play a major role in global knitwear exports, may eventually become important hubs for adopting and scaling next-generation textile materials. As sustainability requirements from international buyers continue to intensify, the ability to work with innovative fibres could become a key competitive advantage.

Looking Ahead

The global conversation around sustainable fashion is gradually moving beyond simple material substitutions. While recycled polyester represents an important step toward resource efficiency, it does not fully resolve the environmental challenges associated with synthetic textiles.

Biosynthetic fibres offer a pathway to a new generation of performance fabrics, materials that deliver the durability and functionality of polyester while reducing dependence on fossil fuels and limiting the long-term impact of microplastic pollution.

Although the industry is still at an early stage in this transition, research and investment in bio-based materials are growing rapidly. As technologies mature and production scales up, these innovations could reshape the future of textile manufacturing.

In the coming years, the key question for the industry may no longer be whether alternatives to polyester are necessary. Instead, the focus will likely shift to how quickly these alternatives can be developed, scaled, and integrated into global supply chains.

The next generation of performance textiles may not come from oil wells, but from laboratories and bioreactors that harness the potential of biological science to create smarter, cleaner materials for the future of fashion.

N. KUMARAN



From Skepticism to Insight A Meaningful Dialogue on India's Apparel Future

When Doubt Turns into Discovery

It was yet another long day when I was informed about a meeting with a delegation from New Delhi to discuss scaling up India's global share in the apparel sector. My immediate thought was—another meeting that would drain energy without tangible outcomes.

However, I must admit, I was proven completely wrong.

An Interaction That Redefined Expectations

What unfolded was an engaging and insightful interaction at our association, alongside my esteemed office bearers, with a distinguished team led by Padma Shri Dr. Ashok Gulati, accompanied by Dr. Sulakshana Rao, Ms. Ayushi Gupta, and Ms. Riya Jain.

They presented a comprehensive study—an outcome of a year of

rigorous fieldwork, data collection, and deep analysis—titled:

"From Farm to Foreign: Saga of Indian Textile and Apparel Sector."

Representation at the National Stage

Our association had earlier been invited to participate in a Round Table Discussion held on 18.03.2026 in New Delhi, where I had the opportunity to represent the Tiruppur Apparel Cluster as a panelist.

During this engagement, the team also released their second report titled:



Kumar Duraiswamy

Joint Secretary
Tiruppur Exporters' Association

"Stitching Apparel Export Strategy: Lessons from China, Bangladesh, and Vietnam."

A Reality Check: Where India Stands

This report is a remarkable comparative study of competing nations, covering every critical dimension—raw material sourcing, skill development, government support, financial costs, adaptability to global changes, quality benchmarks, operational efficiency, logistics, and institutional commitment.

It clearly identifies where India is falling short and explains why our global apparel market share has remained stagnant at 3–3.5% for over a decade, while countries like Bangladesh and Vietnam have surged ahead.

A Personal Reflection

For someone like me, who constantly reflects on why India has not been able to move beyond this plateau, it was both reassuring and inspiring to see a team of young researchers, guided by the highly respected Dr. Ashok Gulati, working with the same concern and clarity of purpose.

Strengths, Gaps, and Missed Coverage

Their first report, which I had the opportunity to review, brilliantly captures the Indian cotton value chain—from farm to fashion.

However, I must express a slight disappointment that it does not adequately cover the Tiruppur apparel cluster, which contributes nearly 68% of India's knitwear exports.

That said, the second report convincingly highlights the structural gaps and missing links between India and its global competitors.

The Three Pillars of Progress

I have always emphasized, in every forum I engage with—be it industry leaders, government officials, or academic institutions—that:

“True progress in manufacturing hinges on strong alignment between academia, industry, and government.”

When these three pillars come together with real-time insights and actionable solutions, scaling exports and strengthening domestic capabilities becomes achievable.

Research That Matters at the Right Time

It is heartening to see the team from the Indian Council for Research on International Economic Relations (ICRIER) doing commendable work in this direction.

With more findings expected by July, their research comes at a crucial time—especially as India advances Free Trade Agreements with Europe, the UK, and Australia, and moves towards concluding bilateral agreements with the US and Canada.

More Than Reports—A Call to Action

These reports serve as an eye-opener—not just for the industry but also for policymakers—to address the fragmented and missing links in our ecosystem.

If acted upon effectively, they can significantly contribute toward achieving our Hon'ble Prime Minister's vision of reaching USD 40 billion in apparel exports by 2030.

Recognizing Dedication and Authentic Work

While I may not be fully aware of the detailed backgrounds of all the research contributors, I can confidently say, as an industrialist and association representative, that this team—Dr. Sulakshana Rao, Ms. Ayushi Gupta, Ms. Riya Jain, and Ms. Ritika Juneja—has demonstrated exceptional dedication.

Their work reflects genuine field engagement, authentic data, and thoughtful analysis—free from superficial compilation or decorative narratives.

“These are not just reports—they are grounded, honest, and deeply insightful documents.”

Had such efforts been undertaken two decades earlier, India might well have crossed a 10% global market share by now.

Purpose-Driven Support

A special mention must be made of Kotak Karma, whose CSR initiative has been meaningfully invested.

Every rupee spent reflects purpose and impact.

Looking Ahead with Hope

Despite the challenges—from the COVID pandemic to geopolitical disruptions such as the Iran conflict—one hopes for global stability and peace.

A thriving global environment will enable India's apparel industry to grow exponentially, which, in itself, would be the greatest reward for the professor and his dedicated team.

●



Technology & Industry

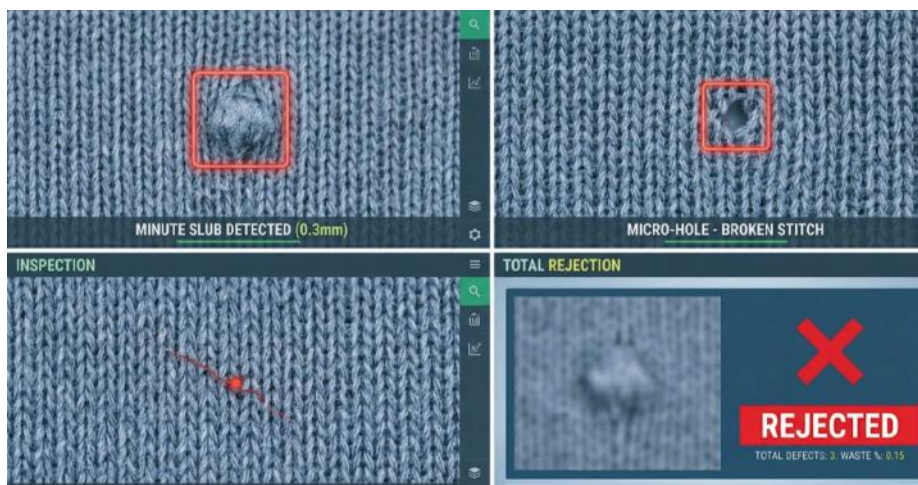
DIGITAL TWIN OF A FABRIC ROLL

This article idea is particularly relevant because fabric typically accounts for 65% to 75% of the total cost of a T-shirt. In a high-volume hub like Tiruppur, a 5% saving isn't just a "bonus"—it's the difference between a loss-making year and a highly profitable one.

AI Changes the Game

1. **Dynamic Nesting Algorithms:** Unlike traditional CAD, AI-powered systems can run thousands of layout permutations in seconds. They "learn" how to tuck smaller components (like pocket facings or neck tapes) into the gaps of larger panels (like front/back bodies), achieving efficiencies humans simply can't reach.

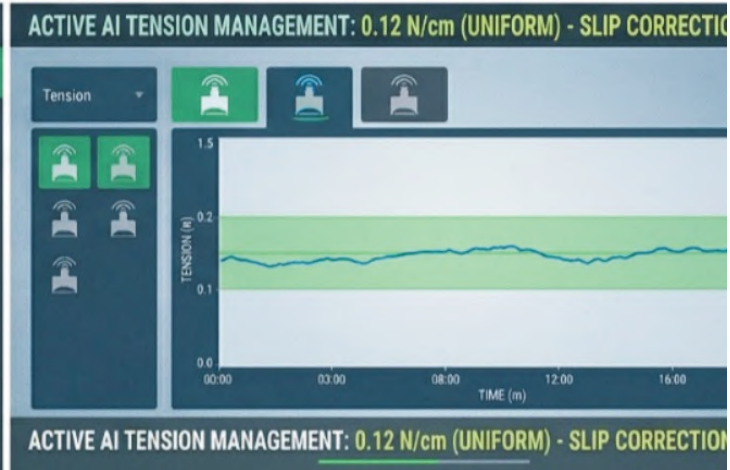
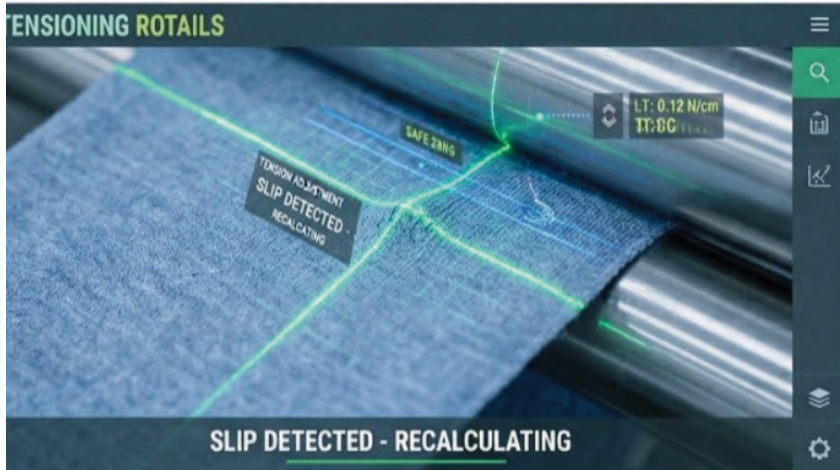
2. **Vision-Assisted Spreading:** Modern machines use high-definition cameras to scan for knitting defects or "slubs" in real-time. The AI then automatically shifts the digital marker to avoid the defect, ensuring that only "A-Grade" panels are cut, drastically reducing re-cuts.



3. **Tension Control for Knits:** Knitted fabric is "alive," it stretches. AI sensors monitor fabric tension during spreading to prevent "shrinkage snap-back" after cutting, ensuring higher size accuracy and fewer rejections.

Case Study: The 18-Month Payback

The Factory: A mid-sized Tiruppur exporter producing 200,000 units/month. **The Problem:** 12% average fabric wastage due to manual marker planning and overlapping errors in spreading. **The Solution:**



Implementation of an AI-integrated automatic spreader and a high-ply CNC cutter. **The Result:** > * **Fabric Saving:** Reduced waste from 12% to 6.5%.

- **Labor:** Reduced cutting room headcount by 60%, reallocating workers to the quality department.
- **ROI:** The **\$150,000** investment was recovered in **16 months** purely through fabric savings and reduced air-freight costs caused by previous delays.

Key Takeaways for Exporters

- **The "5% Rule":** For every 100 tons of fabric, AI saves you 5 tons. At current yarn prices, that's a massive addition to your bottom line.
- **Sustainability Branding:** Using AI to reduce waste is a "Green" story. European buyers prioritize factories that can prove lower material footprints.

"DIGITAL TWIN"

Digital Twins in Cutting: You can now create a "Digital Twin" of your fabric roll. The system knows exactly how much length is left on the roll and matches it to the next best order size, eliminating "short ends" (remnants) that usually end up in the scrap bin.

Traditionally, the fabric roll is a mystery, you don't know exactly where the defects are or how many centimetres will be left at the end.

The **Digital Twin of a Fabric Roll** changes this by creating a "virtual shadow" of the physical material. Before the blade even touches the cloth, the system has already simulated the most efficient way to use every millimeter.

☒ **Zero "Short Ends":** Usually, the last 2-3 meters of a roll are too short for a full marker and get tossed in the scrap bin. The Digital Twin scans the next order in the queue and "steals" that remnant for a smaller size or a pocket piece.

☒ **Defect Mapping:** Instead of stopping the machine when a hole or stain is found, the AI "sees" the defect in the digital twin and automatically rearranges the pattern pieces to move the defect into the waste area between parts.

☒ **Stress-Free Spreading:** It tracks the "tension profile" of the roll, ensuring that the digital measurements match the physical fabric even after it relaxes on the table.

T. Dinesh Kumar

INDIA'S TEXTILE INDUSTRY EMERGING AS A PARTNER FOR SUSTAINABLE FASHION



The global fashion industry is undergoing a profound transformation. Sustainability, once considered a niche concept, has now become a central priority for brands, manufacturers, and consumers alike. Concepts such as circular fashion, responsible sourcing, sustainable materials, and transparent supply chains are rapidly moving from optional initiatives to industry standards.

Across major fashion markets, particularly in Europe, brands are increasingly committing to ambitious sustainability goals. From reducing environmental impact to improving supply chain transparency, companies are rethinking how garments are designed, produced, and distributed. However, as these commitments grow stronger, many brands face a common challenge: finding reliable sources of sustainable materials and trusted manufacturing partners capable of meeting evolving environmental and ethical standards.

Rising Demand for Responsible Materials

European fashion brands are placing greater emphasis on sourcing materials that are both environmentally responsible and socially compliant. This shift is driven by multiple factors, including consumer awareness, regulatory developments, and corporate sustainability commitments.

Consumers today are more informed about the environmental impact of fashion. Issues such as textile waste, water consumption, chemical usage, and carbon emissions have gained widespread attention. As a result, brands are under increasing pressure to adopt sustainable alternatives and demonstrate greater transparency across their supply chains.

Materials such as organic cotton, hemp, recycled fibres, and plant-based dyes are gaining traction as brands explore ways to reduce their environmental footprint. At the same time, circular fashion models, where products are designed for longevity, reuse, or recycling, are becoming more prominent within the industry.

Yet despite this growing interest in sustainable materials, many brands still struggle to identify reliable sourcing partners that can provide both sustainability credentials and consistent manufacturing quality.

India's Strong Position in Sustainable Textiles

India's textile industry is uniquely positioned to support the growing demand for sustainable fashion. With a long heritage in natural fibres, traditional craftsmanship, and textile innovation, the country offers

a diverse range of materials and production capabilities that align well with sustainability goals.

From organic cotton farming to plant-based dyeing techniques and emerging sustainable fibre alternatives, India has developed a strong ecosystem for responsible textile production. In addition, the country's large network of skilled manufacturers provides brands with the capacity to scale production while maintaining quality standards.

This combination of traditional knowledge and modern manufacturing expertise makes India an attractive sourcing destination for international fashion companies seeking sustainable solutions.

Building Bridges Between Europe and India

While the potential for collaboration is significant, many European brands still find it challenging to navigate India's vast and complex textile landscape. Identifying trustworthy suppliers, verifying sustainability claims, and establishing reliable partnerships can require considerable effort and local expertise.

Bridging this gap between European design houses and Indian manufacturers has become an important aspect of strengthening global fashion supply chains.

Through initiatives focused on responsible sourcing and supplier connections, brands are increasingly exploring ways to build long-term partnerships with Indian textile producers who share their commitment to sustainability and transparency.

These collaborations can help brands gain access to innovative materials while supporting manufacturers who invest in environmentally responsible production processes.

Supporting Sustainable Product Development

For fashion brands, transitioning toward more sustainable production involves more than simply changing materials. It requires a comprehensive approach that integrates responsible sourcing, ethical manufacturing practices, and transparent supply chain management.

Connecting brands with reliable manufacturing partners plays a crucial role in this process. When designers and sourcing teams have access to trusted suppliers, they can focus more effectively on developing products that align with sustainability goals without compromising on design or quality.

Such partnerships also allow manufacturers to showcase their capabilities and contribute actively to the development of responsible fashion products. By working closely with international brands, textile producers can adopt new technologies, improve environmental performance, and strengthen their position in global markets.

A Growing Opportunity for Ethical Sourcing

The shift toward sustainable fashion presents a significant opportunity for India's textile industry. As brands continue to prioritise responsible sourcing, the demand for suppliers who can offer sustainable materials and transparent production processes is expected to increase.

Manufacturers that invest in environmentally friendly practices, traceable supply chains, and ethical labour standards will be well-positioned to attract global partnerships.

At the same time, building stronger connections between international brands and Indian suppliers can contribute to a more resilient and sustainable global fashion ecosystem.

Looking Ahead

The future of fashion will increasingly be defined by sustainability, transparency, and responsible production. Brands that succeed in this new environment will be those that establish strong relationships with suppliers who share their commitment to ethical and environmentally conscious practices.

India's textile sector, with its rich heritage and evolving innovation capabilities, is well placed to play a key role in this transformation.

By strengthening connections between European fashion brands and India's sustainable textile ecosystem, the industry can move closer to building supply chains that are not only efficient and competitive but also responsible and future-ready.

N. KUMARAN



MADE IN EU INITIATIVE COULD RESHAPE TEXTILE SOURCING AND STRENGTHEN TURKEY'S ROLE IN EUROPEAN SUPPLY CHAINS

The global textile and apparel industry is constantly influenced by shifting trade policies, supply chain realignments, and evolving market priorities. One development that has recently attracted attention across the European manufacturing landscape is the proposed “Made in EU” framework, an initiative aimed at strengthening production within Europe and its closely integrated economic partners.

While the initiative is primarily being discussed in the context of strategic industries such as technology, energy, and advanced manufacturing, its potential implications extend far beyond those sectors. If implemented in a way that recognises production in Customs Union countries such as Turkey, the framework could have meaningful consequences for the textile and apparel industry, particularly in terms of sourcing strategies and supply chain dynamics.

Strengthening Manufacturing

Over the past two decades, global apparel supply chains have been heavily reliant on manufacturing hubs in the Far East. Countries such as China, Bangladesh, and Vietnam have become dominant suppliers for global fashion brands due to their large production capacity and competitive manufacturing costs.

However, recent disruptions, from the COVID-19 pandemic to geopolitical tensions and logistics bottlenecks, have highlighted the vulnerabilities of long and complex supply chains. As a result, many European brands have begun reconsidering their sourcing strategies and exploring opportunities to bring production closer to their primary markets.

The “Made in EU” initiative, if extended to include Customs Union partners like Turkey, could further accelerate this trend toward near-shoring, where manufacturing is located geographically closer to the end market.

Regional



DR. JANE SHEEBA

Turkey's Strategic Advantage

Turkey has long been recognised as one of Europe's most important textile and apparel manufacturing centres. With a well-established industrial base, a skilled workforce, and decades of experience in textile production, the country has built a strong reputation for delivering high-quality garments with relatively short lead times.

One of Turkey's greatest advantages lies in its integrated textile infrastructure. Unlike many sourcing destinations that rely heavily on imported fabrics or intermediate materials, Turkey possesses a complete value chain, from fibre and yarn production to fabric manufacturing, dyeing, finishing, and garment assembly. This vertical integration enables manufacturers to respond quickly to changing market demands and produce smaller, flexible orders that are increasingly important in modern fashion retail.

If the "Made in EU" framework recognises production in Customs Union countries, Turkey's manufacturing ecosystem could become even more closely aligned with European industrial strategies.

Accelerating the Near-Shoring Trend

In recent years, European brands have been gradually shifting a portion of their production from distant manufacturing hubs to countries that offer shorter lead times and greater flexibility.

Turkey's proximity to Europe provides a clear logistical advantage. Transport times to major European markets are significantly shorter than those for shipments from Asia, enabling brands to replenish inventory faster and respond more quickly to changing consumer trends.

For fashion segments such as fast fashion, activewear, and premium collections, where speed-to-market is critical, this responsiveness can make a substantial difference. A strengthened "Made in EU" framework that includes Turkey could encourage more brands to increase their sourcing volumes from the region.

This shift could also support the growing demand for agile supply chains, where production cycles are shorter, and inventory risks are reduced.

Deeper Integration with European Production Ecosystems

Another possible outcome of the initiative is a deeper integration of Turkish manufacturers within European production networks. If Turkey's textile sector becomes more formally connected to EU industrial frameworks, collaboration between European brands and Turkish suppliers could expand further.

This integration may include closer partnerships in areas such as sustainable manufacturing, advanced textile technologies, and product development. As environmental regulations and sustainability expectations increase across Europe, suppliers capable of aligning with these standards will become increasingly valuable.

Turkey has already been investing in sustainability initiatives, energy efficiency improvements, and environmentally responsible production processes. Stronger alignment with European regulatory frameworks could further encourage these developments.

Potential for New Investments

An additional impact of the "Made in EU" initiative could be increased investment into Turkey's textile and apparel sector. If the country is positioned as a strategic partner within Europe's manufacturing ecosystem, international brands and investors may view Turkey as an attractive location for expanding production capabilities.

Investments could focus on advanced manufacturing technologies, sustainable processing facilities, and innovative textile materials. Such developments would not only strengthen Turkey's competitiveness but also contribute to the broader goal of building resilient regional supply chains.

For the textile industry, these investments could enhance production efficiency, support technological upgrades, and create new opportunities for product innovation.



Implications for the Global Textile Landscape

While the initiative is still under discussion, its potential influence reflects a broader shift in global manufacturing strategies. Companies are increasingly balancing cost considerations with supply chain resilience, speed, and sustainability.

Near-shoring and regional manufacturing are becoming important components of this new industrial approach. For European brands, sourcing from geographically closer partners can reduce logistical risks, improve responsiveness to market changes, and support sustainability goals by lowering transportation emissions.

If Turkey becomes more closely integrated within a “Made in EU” production framework, it could further strengthen its position as a key manufacturing partner for European apparel companies.

A Strong Textile Heritage

Turkey’s textile industry has a long and distinguished history, supported by a combination of craftsmanship, industrial expertise, and technological capability. The country has developed strong capabilities in a wide range of product categories, including knitwear, denim, activewear, and premium fashion garments.

Its ability to deliver high-quality products with speed and flexibility has already made Turkey one of the preferred sourcing destinations for many European brands. Developments such as the “Made in EU” initiative could further reinforce this position by aligning Turkey’s manufacturing ecosystem more closely with European industrial strategies.

Looking Ahead

Although the final structure and scope of the “Made in EU” initiative are still evolving, the discussions surrounding it highlight an important trend in global manufacturing. The future of textile sourcing may increasingly revolve around regional partnerships, supply chain resilience, and strategic production hubs.

For Turkey, these developments could present significant opportunities to strengthen its role within the European textile ecosystem. With its established infrastructure, experienced workforce, and strategic location, the country is well positioned to support the evolving needs of European apparel brands.

As the industry continues to adapt to changing economic and geopolitical realities, initiatives such as “Made in EU” may play an important role in reshaping the geography of textile production in the years ahead.

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