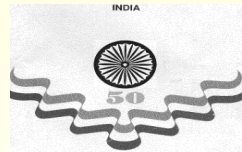




**Govt. of India**  
**Ministry of Small Scale Industries**

# **DIAGNOSTIC STUDY REPORT** **ON** **READYMADE GARMENTS CLUSTER**



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## *GLOBAL SCENARIO:*

The textile and apparel industry, in particular, is one of the most globalised industries. India has been the largest source of natural fiber and a reservoir of ethnic designs. Textile industry is called “Engine of Industry.” Exports show a quantum jump with removal of quantity restrictions. There is a need to develop a world-class apparels industry drawing upon India’s strength in raw materials, skilled manpower and ethnic designs.

The textile and apparel industry differs from producer-driven supply chains led by multinational companies. The apparel industry is a buyer driven commodity chain led by a coalition of retailers, contractors, sub-contractors, merchandisers, buyers and suppliers.

India’s ready-to-wear garment industry is facing tough competition from China, which has emerged as an important sourcing base for international brands and retailers in the Asian regions because of its comparative cheaper costs.

**World wide trade in textiles and clothing of the top 10 countries**  
**Source WTO**

Country	In 2003	% share in the global market			
	Billion US \$	2003	2000	1990	1980
E.U.	58.94	34.8	34.3	48.7	49.4
CHINA	26.90	15.9	10.5	6.9	4.6
U.S.A.	10.92	6.4	7.1	4.8	6.8
SOUTH KOREA	10.12	6.0	8.2	5.8	4.0
TAIWAN	9.32	5.5	7.7	5.9	3.2
INDIA	6.51	3.8	3.9	2.1	2.4
JAPAN	6.43	3.8	4.5	5.6	9.3
PAKISTAN	5.81	3.4	2.9	2.6	1.6
TURKEY	5.24	3.1	2.4	1.4	0.6
INDONESIA	2.90	1.7	2.3	1.2	0.1
TOTAL (Top – 10)	143.9	84.4	83.8	85.0	82.0
WORLD	169.00	100%	100%	100%	100%

## **2.2 INDIAN APPAREL INDUSTRY – AN OVERVIEW:**

**The apparel Industry is one of India's largest foreign exchange earners accounting for nearly 16% of the country's total exports. During 2003-04 the total exports of apparel was US\$ 5200 million.**

**It has been estimated that there are above 40,000 readymade garments manufacturing units in the industry.**

**Exports during April'02-Feb'03 amounted to 1172 million pcs. valued at US\$ 4346.3 million and during 2003-04, the export of garments touched US\$ 5200 million and export target for 2004-05 in US\$ 6000 million.**

## The export statistics (Figures in million US \$)

Item	1999-00	2000-01	2001-02	2002-03	2003-04
Readymade Garments	4765.20	5569.60	4993.84	4085.40	3969.21
RMG of cotton including accessories	3322.40	3926.20	3688.32	3141.72	2963.25
RMG of Silk	124.20	186.60	151.35	100.88	110.34
RMG of Wool	176.70	295.60	237.42	177.90	219.75
RMG of Man made fibres	1007.80	975.40	772.48	540.31	524.31
RMG of other textile material	134.10	185.80	144.27	124.58	151.56
Source:	Foreign Trade Statistics Of India (PC&C) DG CI &S, Kolkata.				

## Trend of Exports of Readymade Garments from India:

Year	Million pieces	Million US \$	US \$/Piece.
2001-02	1422	5005.45	3.57
2002-03	1543	5749.00(+15%)	3.73(+6%)
2003-04	1606	6435.78(+12%)	4.01(+7.5%)

Source: Ministry of Commerce.

### **3.1 DESCRIPTION OF THE CLUSTER:**

**The readymade garments manufactured in Indore are well received in the overseas market. The products are exported through various marketing Channels to U.K., France, Other EU Countries, and Middle East etc.**

**Indore city has been a large center of textile mills and thus Readymade Garments industry is an offshoot of these textile mills. The industry also owes its debut to the readymade garment industry in the nearby cities of Mumbai & Ahmedabad.**

**The Readymade garment industry started with a view to supply dresses to the Royal families of the Holkar State.**

**The readymade garment industry in this era created new designs adding value to the products with gold and silver embroidery and other artwork with proper fittings**

**The high quality of the raw materials and skill used during those days made the dresses and outstanding work of art. The artisans were encouraged in popularizing the industry throughout the country. Four decades back, there were only 8-10 garment units in Indore.**

**During 1940-50 decade, there were only 2 to 3 units which between 1950-60 moved to 5 to 6.**

**However during 1960-70, the total number of readymade garment units shot up to 150 due to big change in fashion & people tried new designs encouraged by the movies of the time. Between 70's & 80's, the number rose sharply to 500 and it went on increasing to 1200 between 80's – 90's & to 1500 between 90's to 2000.**

**Most of the units are tiny units with about 1,00,000 persons directly or indirectly engaged in the cluster.**

### **3.1 DEFINING THE PRODUCT:**

**In India, the Readymade Garment industry is located in Delhi, Mumbai, Kolkata, Indore, Bangalore, Jaipur, Tirupur, Ludhiana, Cochin & Hyderabad. The product manufactured in Indore is mainly kidswear, though there are many units manufacturing shirts & trousers for men's wear and ladies wear. Lately many new units, which have come up in the last decade are manufacturing jeans, which is now the popular apparel among the growing young population. Large MNCs or large domestic players have not entered the kids wear market and ladies wear market as "brands" have not made any headway in this sector. The readymade garment units of Indore have no dearth of orders, as it caters to the non-branded kids wear, ladies wear & gents wear market.**

### **3.1 BROAD PRODUCT GROUPING:**

**The Readymade Garments industry in Madhya Pradesh is mainly concentrated in Indore, which is well known for its fashion garments.**

## Category of garments are manufactured in Indore.

Men & Boy wear	Ladies & Girls (women)	Babies	Articles of knitted garments for men's, ladies, Girls,& infants	Industrial & Institutional garments.	Other clothing & Accessories
A	B	C	D	E	F
<ol style="list-style-type: none"> <li>1. Shirts (Classical/casual)</li> <li>2. Trousers/jeans</li> <li>3. Shorts/ Bermudas</li> <li>4. Coats/Suits</li> <li>5. Nightwears</li> <li>6. Undergarments</li> <li>7. Others.</li> </ol>	<ol style="list-style-type: none"> <li>1. Salwar Suits</li> <li>2. Frocks &amp; Middies</li> <li>3. Nightwear.</li> <li>4. Skirts</li> <li>5. Trousers/jeans</li> <li>6. Blouses</li> <li>7. Party wear.</li> <li>8. Kurta, pajama, churidar.</li> <li>9. Undergarments- Sameej, panties, bra.</li> <li>10. Petticoats.</li> <li>11. Langha, Ghagra &amp; chunni suits</li> <li>12. Long frocks</li> <li>13. Other garments</li> </ol>	<ol style="list-style-type: none"> <li>1. Baby suits</li> <li>2. Frocks</li> <li>3. Rompers</li> <li>4. Shirts</li> <li>5. Bibs</li> <li>6. Knickers</li> <li>7. Jhabla</li> <li>8. Nepi's</li> <li>9. Other Garments.</li> </ol>	<ol style="list-style-type: none"> <li>1. Socks</li> <li>2. Sweaters</li> <li>3. T-Shirts</li> <li>4. Other Garments</li> </ol>	<ol style="list-style-type: none"> <li>1. School Uniforms</li> <li>2. Apron</li> <li>3. Hand Gloves</li> <li>4. Industrial Uniforms.</li> </ol>	<ol style="list-style-type: none"> <li>1. Caps</li> <li>2. Scarves.</li> <li>3. Belts</li> <li>4. Pillow covers/ Bed sheets</li> <li>5. Saree falls</li> <li>6. Curtains</li> <li>7. Cushions Covers</li> <li>8. Others.</li> </ol>

### **3.4 DEFINING VARIOUS SUB-ACTIVITIES:**

**The basic raw material cloth, which is used for manufacturing of readymade garments is available in the following categories.**

- 1. Fabrics – Regs/fents/cutpieces**
- 2. Fabrics- (a) Rolls- (upto 20mt. Length)  
- (b) Lumps ( above 20 mts & upto 60mts.)**

**In the above said first category, the whole lot is sorted out and put in various groups as per required sizes. The second category of rolls and lumps are used in better quality and big orders. The fabrics used are checked visually for defects and machine tested for texture strength & colour fasteners if required. The fabrics is then put into various operations as per the process flow chart.**

**Keeping in view the innumerable products and designs manufactured by the readymade garment industry, the process of manufacture for each item varies and thus it cannot be presented in this report.**

**The sample is first designed & developed according to the sample supplied by the buyer and all the components and raw material details are recorded & cost calculated. The sample is then approved after which patterns for different sizes are developed. The sorted fabric is then layered and patterns' marking is done. The layered cloth is then cut, marked, components grouped together & sent to stitching section. The special value added operations like embroidery etc, if required, is done and the components stitched. The goods are then checked, finished, packed & dispatched.**

### **3.5 CURRENT OUTPUT:**

- **Approximate number units - 1500 nos.**
- **No. of Exporter- 20**
- **Supplier to Domestic Market- 850**
- **Fabricating or stitching units 550**
- **Dyeing/washing units-30 nos.**
- **Machine embroidery units. -10**
- **The value of products manufactured by the cluster is estimated to be Rs. 600 crores. Out of which Rs. 100 crores worth of readymade garments are exported and the rest are consumed in the domestic market.**
- **The broad sub groupings of products is as follows:**
  - **Readymade garments for gents - 30%**
  - **Readymade garments for ladies- 15%**
  - **Readymade garments for Children -50%**
  - **Other items \_ 5%**

**About 1,00,000 persons are directly & indirectly getting employment in this sector. The average employment in small unit is about 15 persons**

### **3.6 FACTORS FOR GROWTH**

- AVAILABILITY OF RAW MATERIALS**
- SKILLED MANPOWER**
- NON-PROXIMITY OF OTHER RMG CLUSTERS**
- FLEXIBLE SPECIALIZATION**
- PATRONAGE FROM STATE GOVERNMENT OF MADHYA PRADESH**
- ENTREPRENEURSHIP**

## **4.1 CORE CLUSTER ACTORS:**

**The readymade garment industry of Indore can be categorized as under:**

**CATEGORY 1: Manufacturer- exporters numbering about 20 units.**

**CATEGORY 2: Manufacturer in the domestic market. numbering about 850 units.**

**CATEGORY 3: Fabricators numbering about 550 units.**

**CATEGORY 4: Machine embroidery group. numbering about 10 units.**

**CATEGORY 5: Skilled labour doing hand embroidery and other related works.**

**CATEGORY 6: Group engaged engaged bleaching /dyeing / washing of the fabric garment numbering about 30 units.**

**CATEGORY 7:** Group comprises of dealers, traders and manufacturers of fabric, buttons, labels, fittings etc. The annual turnover of textiles by these traders is estimated to be around Rs. 300 Crores.

**CATEGORY 8:** Machine suppliers ,tooling suppliers manufacturers of packaging materials and other inputs. Though the exact number of suppliers are not known, they are sufficient in number to the needs of the industry.

**CATEGORY 9:** Group comprises of dealers, traders, exporters & marketing agents. The number of agents in the market is high and the total cannot be ascertained.

## **THE EXISTENCE OF INTER-FIRM AND INTRA-FIRM LINKAGE:**

**There is a strong existence of inter-firm and intra-firm linkage among the readymade garments cluster of Indore. The firms are mostly integrated horizontally and not vertically. Because of the low scale of operations and subcontracting relationship, the cluster is capable of executing all kinds of orders.**

## **4.2 OTHER CLUSTER ACTORS:**

-  
**(a) ASSOCIATIONS HAVING DIRECT STAKE IN THE CLUSTER.**

- (i) INDORE READYMADE VASTRA VYAPAR SANGH  
23:24, Subhash Chowk, Rajwada, Indore (M.P.)  
Ph-2453438**

**This association was formed in 1966. It plays an active role in the developmental work of its members and organizes many events from time to time. It also solves disputes between buyers and manufacturers of Readymade garments. There are 600 members in this association.**

**(ii) READYMADE GARMENTS COMPLEX ASSOCIATION,  
131, Pardesipura, Indore (M.P.)**

**This association was formed recently and consists of all units, which are located within the readymade garment complex. It is actively involved in all matters for the development of the readymade complex & problems faced by its members.**

**(b) INSTITUTIONS HAVING INDIRECT STAKE IN THE CLUSTER**

**(i) APPAREL EXPORT PROMOTION COUNCIL.**

**Unfortunately, AEPC does not have any Office in Indore. Efforts are to be made to open a branch of AEPC at Indore.**

**(ii) APPAREL TRAINING AND DESIGN CENTER**

**Indore does not have the centre. The presence of a ATDC branch at Indore would bring about a change in the most critical issue.**

**(iii) NATIONAL INSTITUTE OF FASHION TECHNOLOGY.**

**The institute did not have a centre in Indore. However recently they have tied up with Women Polytechnic , Indore and few courses will commence from the current session 2005-06.**

**(iv) NATIONAL INSTITUTE OF FASHION DESIGN.**

**The Indore Centre of NIFD has been judged as the best centre recently.**

**(v) INDUSTRIAL TRAINING INSTITUTE:**

**It is running tailoring courses and its influence in readymade garment industry is very limited.**

**(vi) REGIONAL VOCATIONAL TRAINING INSTITUTE;**

**The center runs 2 courses on Basic & Advanced course in Dress Making**

**(vii) TEXTILES COMMITTEE**

**Services include:**

- **Testing of textiles, dyes, chemicals, effluents**
- **Consultancy for ISO 9000/ISO 14000/SA 8000**
- **Organizing training programmes**
- **Creating database of the industry**
- **Inspection & certification-GSP, handloom certificates & classification of readymade garments.**

**The local centre of Textile Institute is actively involved in the textile sector and its activity in readymade garment cluster is limited.**

**(viii) WOMEN POLYTECHNIC**

**The polytechnic has now tied up with NIFT and will commence a 2 year course in Advance Diploma in Apparel Design & Manufacturing & few other short term courses from 2005-06.**

**(ix) ATIRA :**

**The Ahmedabad Textile Industry's Research Association an autonomous co-operative non-profit association for textile research. The main objectives are to carry out scientific research in textiles to help the textile & allied industries achieve international competitiveness. It also offers textile facilities, consultancy services & training programmes on computers in designing and pattern cutting of garments.**

**MADHYA PRADESH ADYOGIK KENDRA VIKAS NIGAM(INDORE)  
LTD.(MPAKVN)**

**Entrusted to develop the Readymade Garment Complex at Indore under the Textile centre Infrastructure Development Scheme. The complex has been set up to promote clusterisation of the small and medium apparel industry in Indore. It shall consequently promote linkages between different specialized units enabling the provision of shared facilities, services and an accelerated development of the apparel sector in the city. The agency is also instrumental in the development of the Special Export Zone (SEZ) and apparel park at Pithampur, approx.30kms form Indore. About 30 units have started operation in the Readymade Garment Complex.**

**The Government Departments having direct/indirect stake in the cluster.**

- 1) District Trade and Industries Centre**
- 2) Small Industries Service Institute.**
- 3) National Small Industries Corporation.**
- 4) Small Industries Development Bank of India**
- 5) Madhya Pradesh finance Corporation.**
- 6) Nationalized Banks.**
- 7) Madhya Pradesh Small Industries Development Corporation.**
- 8) Madhya Pradesh Trade and Investment Facilitation Corporation.**
- 9) Export Credit Guarantee Corporation.**

### **4.3 VALUE CHAIN ANALYSIS:**

- |   |                                   |
|---|-----------------------------------|
| <b>1. Fabric</b>                          | <b>45 - 60%</b> (% on sale price) |
| <b>2. Cutting &amp; stitching charges</b> | <b>10-16%</b>                     |
| <b>3. fittings &amp; accessories</b>      | <b>6-9%</b>                       |
| <b>4. finishing and packing</b>           | <b>5-7%</b>                       |

**For example, if a garment which is sold at Rs.100/- (whole sale price), the value chain analysis would be as such:**

<b>1. Cloth -</b>	<b>50.00</b>
<b>2. Cutting and stitching-</b>	<b>16.00</b>
<b>3. Fittings &amp; accessories –</b>	<b>08.00</b>
<b>4. Finishing &amp; Packing –</b>	<b><u>06.00</u></b>
<b>Total</b>	<b><u>80.00</u></b>

**The cost of production for one shirt is Rs.80.00 and sale price is Rs.100. The gross profit is 25% for the product.**

**Net profit is much lower after adjusting the expenses for establishment, electricity, transportation, depreciation etc.**

## **5.1 ANALYSIS OF BUSINESS OPERATIONS: (PROBLEMS IDENTIFIED)**

**The following section presents an analysis of the business operations for the readymade garments cluster. The analysis is built on the following factors:-**

- **Raw materials**
- **Machinery and production**
- **Products and marketing**
- **Background of the entrepreneurs and their enterprises**
- **Finance and working capital**
- **Manpower requirements**
- **Infrastructure facilities**
- **Business development services.**

## **5.0 INDUSTRY STRUCTURE ANALYSIS**

**The industry structure analysis of the Readymade garment cluster of Indore determines the firm level profitability and SME viability and prospects of growth.**

**The entry barrier in the above cluster is low.**

**The rivalry amongst the units is moderate.**

**The bargaining power of the suppliers in the cluster is low.**

**The bargaining power of the customers is high.**

## **6.0 SWOT ANALYSIS:**

### **Strength**

#### **Market**

- **Strong presence in the domestic market**
- **Not much import of readymade garments.**
- **A highly developed relationship with the customers.**

#### **Technology**

- **Low investment & Labour intensive.**
- **Easy availability of domestic & imported machines.**
- **Demonstration effect.**

#### **Inputs Availability**

- **Easy availability of raw materials & other inputs.**

#### **Skills**

- **Easy availability of skilled manpower.**
- **Vast pool of skilled laborers.**

#### **Innovation Capability**

- **Ability to develop new items as per customers requirement.**
- **Flexible operating practices.**

#### **Business Environment.**

- **Stable business environment.**

## **WEAKNESS :**

### **Market**

- **Import started coming in.**
- **In adequate information on changing customer preference.**
- **Traders enjoy most of the profit in the value chain.**
- **Not aware of the market potential.**
- **Lack of brand image.**
- **No effective agency is presently working to help in export marketing.**
- **Unhealthy competition.**
- **Delayed & irregular payment.**

### **Technology**

- **Traditional method of production.**
- **Low level of technology development.**
- **High rejection & rework rate.**
- **Problems with quality & productivity.**
- **No suitable training courses by institutions.**

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### **Inputs Availability**

- **High cost of raw material**
- **Shortage of power.**
- **Low productivity of labour.**
- **High rate of interest.**

### **Skills**

- **No skill up gradation courses for workers.**
- **Techno-managerial capabilities of entrepreneur's poor.**
- **No tailor made training courses for the industry.**

### **Innovation Capability**

- **Slow response to change in fashion design.**
- **Hardly any change to technology, process & marketing.**

### **Business Environment.**

- **Customers becoming brand conscious**
- **Competition is increasing.**

## **OPPORTUNITIES:**

### **Market**

- **Growing domestic & international market.**
- **Product diversification.**
- **Quality and Productivity is the mantra.**
- **Participation in trade fairs, both domestic & international.**
- **Enterprises can form groups for international marketing.**

### **Technology**

- **Creating awareness of technology among entrepreneurs.**
- **Prospects of setting up Common Facility Centre.**
- **Possibility of setting up Design studios/Testing Centers.**

### **Inputs Availability**

- **Availability of inputs will become cheaper and range wider.**

### **Skills**

- **A highly skilled workforce can be created which will raise the productivity.**

### **Innovation Capability**

- **Exposure visits to developed clusters, inland and foreign.**
- **Participation in trade exhibitions, national & international.**

### **Business Environment.**

- **With the removal of the quota regime, a favorable business environment is in the offing.**

## **THREAT**

-

### **Market**

- **Competition will be more in the coming years.**
- **There will be more imports in future.**
- **Fittest will survive, and weak will perish.**

### **Technology**

- **Technology can impose a major threat unless modernization takes place.**
- **Technology is an ever changing process.**

### **Inputs Availability**

- **Government policy will make raw materials domestic or imported cheaper or costlier.**
- **Quality of raw materials.**

### **Skills**

- **Skill base of workers need up gradation to adopt latest technology.**

### **Innovation Capability**

- **Innovation will make or break an enterprise.**

### **Business Environment.**

- **The changing business environment is always a challenge to the less enterprising units.**

## **7.0 - CLUSTER VISION**

**TO ACHIEVE AND MAINTAIN A STRONG  
FOOTHOLD IN THE EXPORT AND DOMESTIC  
FRONT BY INCULCATING THE BEST  
MANUFACTURING PRACTICES BY THE YEAR  
2008.**

## **8.0 STRATEGY:**

**The readymade garment cluster of Indore has a high growth potential provided certain changes are brought about by interventions in “key areas.”**

**The key areas in which strategic interventions are needed is as given below.**

- **Networking among cluster actors**
- **Technology up gradation.**
- **Developing and activating the BDS.**
- **Exports led growth.**
- **Liberalization of Government policy & Regulations.**
- **Infrastructure development.**

## **9.0 ACTION PLAN**

### **(I) NETWORKING AMONG CLUSTER ACTORS.**

**A strong network has to be created among the cluster actors and/or smaller networks among the cluster actors performing similar functions within the cluster so that they can solve their common problems, appeal & place their demand to the related Government bodies. They can even jointly purchase raw materials & other inputs and /or market their products, in the global market by achieving economies of scale. The industry association needs to be strengthened and made more proactive. The association needs to have a website of its own.**

## **(II) TECHNOLOGY UP-GRADATION**

**Units are shifted to an industrial area with proper infrastructure, and manufacturing RMG with appropriate technology.**

**Alternative approach may be to set up a large common facility centre with modern machines and trained work force**

**Technology up-gradation Would leads to:**

**Minimizing rejection/rework rate.**

**Improving productivity**

- Savings on labour and time**
- Reducing cost of production**
- Improving quality standards**
- Making the cluster competitive.**

**The manufacturing process followed is to be studied thoroughly by technical experts and improvements suggested.**

**Diversification is also an area which is to be given due importance. A study needs to be conducted to identify products which can be easily assimilated into the cluster.**

## **DEVELOPING BUSINESS DEVELOPMENT SERVICES.**

Energizing the present Business Development Service Providers and Creating new ones in the important areas is the critical element in the development of the cluster.

The National Institute of Fashion Technology does not have any branch in the city, though a tie-up with Women Polytechnic has been arranged. A full fledged branch of NIFT is needed to give design development a boost.

**AEPC & ATDC** should open up centres.

The entrepreneurs are to be made aware of the immense opportunities in the export market.

There is a need to develop BDS in various fields.

A mechanism needs to be developed by BDS to benchmark the performance of the cluster against other clusters in India & abroad

Modern management practices like JIT, TQM, supply chain management form an important link between technology up-gradation and competitiveness.

BDS on quality management for ISO certification and to focus on international standards of quality & excellence is needed to achieve internationally comparable & quality finished goods. The cluster has to ensure that quality parameters are maintained at each level of production from raw material to finished product.

## GROWTH IN EXPORTS:

A continuous and sustained approach to promote exports by brand building exercises, participating in international fairs, joint marketing forming consortiums, organizing international level trade fairs, utilizing new yarns, exposure visits, improved value chain management, international sourcing of raw materials are suggested.

## **LIBERALISING GOVERNMENT RULES & REGULATIONS.**

The action plan has to be based on partnership of government and industry. The government has to provide conducive policy environment to strengthen the fundamentals of the industry. While the industry acts at the micro level to achieve international competitiveness.

The Government needs to take urgent action in the following areas.

- .. Fiscal levy reforms.
- .. Liberalization of labour laws.
- .. Infrastructural reforms.
- .. Interest rates
- .. Trade relations with other countries

## INFRASTRUCTURE:

The state infrastructure development agency MPAKVN and Indore Readymade Vastra Vyapar Sangh and local authorities are to be brought un a platform so that deliberations can take place in order to pave the way for shifting of the units to the Readymade Complex. The entrepreneurs are to be motivated to set up units in the SEZ and proposed apparel park either individually or jointly.

Benefits of cheaper power through TCIDS & Green Option credits to be availed by the exporters for improving profit margin.