

A Study on Buyers' Requirements in Apparel Export Orders in Tirupur Knitwear Industry



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India is today recognized as one of the best sourcing destinations for garments, textiles, accessories and finish. It provides a perfect blend of fashion, designs, quality, patterns, textures, colours and finish. Manufacturers here are ready to innovate, be flexible on quantities, have a hands-on approach to quality control and keep the integrity on deadlines. As the world's second largest producer of textile and garments, India's garment exports total US\$ 10.17 billion during the year 2008-09, giving it an enviable market share of 2.99%. USA, EU, much of Asia and Middle East are India's clients. The industry proudly supports 7 million people as part of its workforce, and aims to double this figure by 2011-12; even today it is the second largest provider of employment in the country. For every INR 100,000 invested in the industry, an average of 7 additional jobs created.

The Apparel Sector alone contributes to 8% of India's total exports with exports recording a 1 % growth over last year. By the year 2011-12, India expects to record a 15% growth in quantity and 20% growth in values in Ready Made Garments (RMG) exports. India, today, ranks 6th in the world, with a 2.6% world market share and robust 11 % growth. A friendly Government policy towards exports and excellent cultural and political connections with the importing countries has nurtured this industry and made it bigger and better each year.

Tirupur for its contribution to the apparel export efforts claims the title of 'Town of Export Excellence'. Tirupur is a knitwear town in Tirupur District of Tamilnadu and is popularly known as Banian City / Knit City. Tirupur is situated at 50 Kms, east of Coimbatore and the municipal area of town is spread over 27.20 sq kms with a population of around 7 lakhs. Some of the world's largest retailers including C&A, Wal-Mart, Switcher, Diesel, ARMY, Tommy Hilfiger, M&S, FILA, H&M, HTHP, Whale, Reebok, VALUE, etc. are the main buyers importing apparel from this city.

The buyers' requirements differ from buyer to buyer who belongs to the same country as well as to different countries. This difference is due to their culture, level of business, targeted customer such as high class, middle class and low class. Targeted category such as ladies wear, kids wear, men's wear etc. The factors which they differ from buyer to buyer is quality, price, delivery time, short quantities, approvals, international commercial terms, mode of shipment, code of conduct, order size etc., This study is carried out to know the various levels of requirements of buyers in an export garment order.

Objective of the Study

The main objectives of this study are

- ☞ To get awareness about attitudes of different buyers from various countries
- ☞ To identify the buying attitude of different buyers on the basis of quality, price, delivery time, short quantities, international commercial-terms, AQL level etc.

- ☞ To identify the major deviation factors from buyer to buyer.
- ☞ To give solution to the problem of misunderstanding between buyers and manufacturers.

Need of the Study

India is one of the leading textile and apparel hub for many countries all around the world. The buyers' requirements differ from buyer to buyer and also from country to country. The need of the study is to identify the factors in which how the buyers differ from each other and to get an awareness of the buying behaviour of specified buyer of different country.

Scope of the Study

Buying attitude differ from buyer to buyer because of their culture ,trend, season, targeted category, consumer requirements etc., The scope of the study is to identify the attitude towards quality, price, delivery time, short quantities, approvals, international commercial-terms, mode of shipment, code of conduct, order size, AQL level etc., changes from buyer to buyer and country to country. This study may be used as reference while approaching and dealing with buyers.

Limitations of the Study

The limitations of this study are, the study was carried out only in Tirupur apparel industry, and the data may not represent the full actual fact. The sample size is limited and also time constraint is also a limitation for the study. Bias on the part of the respondent while answering the questions is yet another limitation. Communication barrier with both the researcher as well as the respondents may not be accurate.

Back Ground of the Study

Indian exports of Apparel & Textile – Facts & Figures

Indian readymade garments and textiles are extremely popular the world over. Today, garments exports from India have made inroads into the international market for their durability, quality and beauty. One of the reasons for the economical pricing of India's ready made garments and apparels is the availability of highly skilled, cheap labor in the country. The superiority of India's Garment Industry has been acknowledged in the National Textile Policy (NTP) of India. Having realized the tremendous growth potential of this sector there is a proposal in the NTP for taking the Indian Garment Industry out of the SSI reservation list.

- Exports increased from US\$ 14 million (2004-05) to US\$ 17 million (2005-06) - 21.77 % increase.
- With continuing growth, the total exports has increased to - US\$ 19.62 billion (2006-07).
- Current share in world export of textiles - 3.5 - 4 %.
- Current share in world clothing export - 3 %.
- Major export market - Europe (22% share in textiles & 43% share in apparel).
- Single largest buyer - US (10% share in textiles and 32.65% share in apparel).
- Other major export markets include - UAE, Saudi Arabia, Canada, Bangladesh, China, Turkey and Japan.

- Largest export segment - Readymade Garments (45% share in textile exports and 8.25% share in India's total exports).
- Readymade garments sector has benefited significantly with the termination of Multi-Fibre Arrangement (MFA in January 2005)
- Exports of readymade garments are expected to touch US\$ 14.5 billion with a cumulative annual growth rate of 18-20% (Apparel export Promotion Council).

The textile and apparel sector is highly diverse, and covers the entire supply chain from fibre production through spinning, weaving, knitting and dyeing and finishing to the production of finished goods such as apparel and home textiles. The apparel industry is one of the country's largest foreign exchange earners. It is also the most fragmented industry of the sector. There are approximately 60,000 manufacturers. The majority is small firms with 30-50 machines, and accounts for 75% of domestic production. More than 50% of Indian knitwear is manufactured in Tirupur (Tamilnadu). The majority of Tirupur's production is for the lower price segment of the market. India's strength lies in the manufacture of medium-quality and relatively high fashion ready-made apparel produced in small lots for niche segments of the domestic and export market (e.g. containing garments of considerable embroidery). The apparel industry employs around 4 million people, and helps to support labour working in ancillary manufacturing buttons, zippers, sewing threads, metal stands, poly bags, cartons, cardboard sheets, etc.

Strengths

- Large and growing domestic market of 1.1 billion people, growing at annual rate of 1.44%
- Fully integrated from fibre to finished garments,
- vertically integrated and almost complete in value chain
- Availability of domestic raw material, especially cotton
- Adequate skilled manpower
- Comparatively lower labour rate, US\$0.57 per hour
- Increased purchasing power and rapidly growing consumer market of 300 million people
- Bulging middle income group with disposable income
- Improving rural economy helping to create a surge in demand for consumer goods
- Heavy investments in machinery and equipment in textile and garment sectors
- World's second largest production of textiles
- Government support with well package of fiscal incentives
- One of the largest economies in the world
- Diverse textile base, availability of an unmatched variety of power-loom fabrics and creative handloom fabrics

Weaknesses

- Low price image
- Buyer hardship and control
- Environmental and social regulations

- Export base in garment narrow. Over 50% confined to four products.
- Relatively low technology
- In the decentralized garment sector, traditional tailoring background and automation are hardly available.
- Inconsistent quality and low productivity
- India's power cost works out to be higher. As per ITMF Study 2003 of seven countries higher than China, Brazil, Korea, Turkey and the U.S. - Cost US\$0.08 per kW.
- India's cotton yield is only 372 kg per hectare as compared with world's average of 900-1,000 kg.
- Low labour productivity
- Labour laws weighted towards employees; as a result, companies end up with disruptive and unproductive employee unions mainly externally and politically motivated.

Buying Behaviour of Clothing Buyers

Research and development in apparel industry is ongoing process. Every now and then, there are new developments, innovations, improvements in existing processes, which are in terms of fabric, style, stitching details, patterns, prints and their designs, but cycle of fashion keeps on revolving and always repeats after certain period. Fashion trends moves in the direction from west to east. Trends which are in the western countries (USA, UK, France and Italy, will be the future trends in east and other countries. In other terms, we can call them fashion trendsetters.

Trends are in terms of styling, detailing and patterns, which is the invention of their dexterous designers and trend readers. Innovations and research done in terms of fabric and accessories in China, India, and Hong Kong shall be the basis of styling and patterns of trendsetters. Eventually call them supporters/active participants of the trends. Nevertheless, we can segregate the whole apparel and fashion world in three categories.

1. Fashion and trend-setter countries
2. Retailing, Marketing and merchandising specialist countries
3. Sourcing, Production and process oriented countries

1. Fashion and trendsetter countries are France, Italy, UK and USA. We find lots of excellent designers, designing institutes, fashion stores, boutiques, and renowned brands like Chanel, Armani, Hugo Boss, GAP, A&F, and Valentino etc.

2. Marketing and Merchandising specialist countries are USA, UK, Hong Kong & India. They have the best concepts of marketing, retailing and merchandising in their own areas. Due to presence of the best fashion merchandising schools, they have good command over their retailing and marketing skills, India and Hong Kong are the emerging markets nowadays in terms of their retailing plans and encouragement to satisfy the domestic demand. Like Macys, Wal-Mart, Target, GAP, A&F, Nordstrom, Reebok, Nike, Sainsbury, Lifestyle, Wills lifestyle, Max, etc.

3. Sourcing, Production and process-oriented countries are China, India, Vietnam & Bangladesh. They are export & process oriented countries due to less expensive labor,

cheap raw material and govt. encouragement to exports. They are the best in to their own areas of specialization. Like- Li-n-Fung, Must Garments, Lenny Fashions, GI, Orient Craft etc.

There are many other countries, which are the part of above-mentioned categories like Spain, Germany, Pakistan, Canada, Brazil, Thailand etc. Nevertheless, they cover only a small part of these categories. However, buyers study the trends very carefully, understanding the concepts of behaviour of consumers, their presence, their aesthetic sense etc. Generally, when we get into this concept, we find that North American buyers travel to European markets to grab the idea of fashion trends, stories, themes and colour combinations. After studying the market, they apply the same to prepare their style packages, to get the prices and costing from vendors. It applies the same to European buyers; visit the America or Retail outlets of US based brands to sense the market trends.

Many Italian/US brands emphasis to colours and hand feels with their basic patterns. Brands like UCB, American eagle are the examples of these outfits. However, it is presumed thinking that, it is not the color, but also the hand feel, which sells the garment into the market. Colors are their to tempt the customers to pull them in the showroom, it is the hand feel and price, which ultimately satisfy their aesthetic desires and psychological needs.

Buyer – Vendor Relationship in Apparel Industry

As the Indian textile industry expands, the relationship between the buyer and the vendor in the Indian apparel export sector is undergoing a gradual metamorphosis. The once professional relationship is fast changing into a partnership. Earlier, it was the buyer who usually dictated the terms, but now both the buyer and the vendor are on an almost equal footing. This change has occurred on account of the rising competition and the rising supremacy of the customer. Both the players now recognize the importance of the other in their own growth.

More and more buyers are trying to provide assistance to the vendor in the production process. In most of the cases, this assistance is in the form of production process support. Today, vendors are also looking to buyers to help them in collecting market information. Some buyers also provide information to the vendor as to how their products are being liked and bought by the customers. This helps the vendor in knowing customer preferences and in making the necessary changes in the product. Sometimes, the buyers also help the vendors in procuring the necessary raw material for the production of the final product. At the same time, the buyers are actively taking interest in the process of production and in how the cost of production is constituted.

Initially, quality checks were undertaken only after the order was fully processed or after most of the processing was done. Buyers and vendors are now realizing the fact that this leads to wastage of resources and time. In order to avoid delays in shipping, buyers are now allocating quality control officials to the vendors to monitor the quality of the product at the same time as it is being produced. This ensures that the product of the required quality is produced with minimal wastage of resources and that any delay is avoided proactively. By cutting down unnecessary wastage, this step ensures that the

cost of production remains under control. Any problems in the production of the product can be detected at an early stage and resolved. Customers all over the world are becoming more informed and thus, more aware and choosy. They are now more selective in terms of price and quality. It is necessary for the buyer to provide products of the best quality at the required time and at a competitive price, in order to retain customers.

Hence the buyers and vendors find it easier and in their best interests to work closely with each other. In this way, this change in relationship also ensures that the buyer is able to deliver goods of the desired quality at a reasonable price to the customer at the proper time. The vendors have realized their dependence on the buyers for their own sustained growth. Thus, close ties between the buyer and the vendor have become imperative. The level of transparency and cooperation in the buyer-vendor relationship is on the rise. Both parties no longer hesitate to share important information, as surviving the tough competition has become a joint effort. The focus has now shifted to greater communication, trust and working together towards a common goal."

Buyers' Requirements in an Apparel Export Order

The main requirements of buyers in an apparel export order are as follows:

1. Delivery Time

The delivery time required by the buyer may range from 30 days to 90 days.

2. Quality Level

The Acceptable Quality Levels required by the buyer generally are AQL 1.0, AQL 1.5, AQL 2.5, and AQL 4.0. The acceptable quality level or AQL of a sampling plan is a measure of the level of quality routinely accepted by that sampling plan. It is defined as the percent defective (defectives per hundred units X 100%) that the sampling plan will accept 95% of the time. This means lots at or better than the AQL are accepted at least 95% of the time and rejected at most 5% of the time.

3. Shipment Quantity tolerance

This relates to the tolerance level of the excess quantity above the order quantity and the tolerance of shortage quantity below the order quantity that can be accepted by the buyer.

4. Mode of shipment

This refers to the preference of mode of shipment of the order by the buyers. The mode of shipment of the order may be by sea, by air, by road or by the combinations of all these modes.

5. INCO Terms

The International Commercial Terms (INCO terms) preferred by the buyer for this particular order. The INCO terms dictates the responsibility of the exporter till where and the buyer form where in the shipment process. There are 13 INCO terms are available and commonly used terms are Free On Board (FOB), Cost and Freight (CFR) and Cost, Insurance & Freight (CIF).

6. Mode of Payment

The mode of payment for the orders may be done through Letter of Credit (L/C), Cash in Advance, Cash on Telegraphic Transfer, and Credit.

7. Price Level

High quality conscious buyers normally give high price for the product where as normal quality conscious buyers give normal price. The buyers who give high volume tend to be more price conscious than quality conscious normally give lower price than the normal price of the product.

8. Quality standards

The quality requirements vary from buyer to buyer and also country to country. The quality standards generally preferred by the buyers are ASTM, AATCC, ISO 9001, ANSI, and BS.

9. Code of Conduct

This refers to the responsibility of the buyer towards employees and society. The main principles of the code of conduct standards are compliance with laws and workplace regulations, prohibition of forced labour, prohibition of child labour, prohibition of harassment or abuse, compensation and benefits, hours of work, prohibition of discrimination, health and safety, freedom of association & collective bargaining, environment, customs compliance, security etc. There are several code of conduct standards preferred by the buyer to which the exporters have to oblige. The commonly preferred code of conduct standards are SA 8000, WRAP, OHSAS, Oeko-Tex, ISO 14000, Sedimentary Exhalative Deposits (SEDEX) etc.

Research Methodology

The research method adopted for this study is Descriptive in manner as this study describes the actual state of particular situation in the Tirupur apparel export industry. The sampling technique is non probability convenience sampling and the sampling units are exporters. The respondents are management personnel like merchandisers, managing directors, general managers etc. The sample size selected is 50 respondents from 17 apparel export companies in Tirupur and the sampling frame is Tirupur apparel export cluster. A structured questionnaire is prepared to collect the primary data from the respondents. The descriptive data analysis is done using simple percentage analysis.

Data Analysis and Interpretation

| Country | No. of Respondents | Percentage |
|----------------|---------------------------|-------------------|
| UK | 14 | 28.00 |
| Italy | 6 | 12.00 |
| France | 6 | 12.00 |
| USA | 12 | 24.00 |
| Canada | 6 | 12.00 |
| Russia | 6 | 12.00 |
| Total | 50 | 100.00 |

It is observed from the above table that 28% of the buyers are from UK, 24% of the buyers are from USA, and 12% of the buyers are from Italy, France, Canada and Russia. It is concluded that majority of the buyers are from UK.

| Product Segment | No. of Respondents | Percentage |
|------------------------|---------------------------|-------------------|
| Men's wear | 17 | 23.29 |
| Kid's wear | 20 | 27.40 |
| Ladies wear | 20 | 27.40 |
| Sport's wear | 7 | 9.59 |
| Nightwear | 7 | 9.59 |
| Party wear | 0 | 0.00 |
| Innerwear | 2 | 2.74 |
| Others | 0 | 0.00 |
| Total | 73 | 100.00 |

It is obtained from the above table that 27.40% of the buyers prefer kid's wear and ladies wear, 23.29% of the buyers prefer men's wear, 9.59% of the buyers prefer sports and night wear and 2.74% of the buyers prefer inner wear. It is concluded that majority of the buyers prefers kid's wear and ladies wear.

| Average order size | No. of Respondents | Percentage |
|---------------------------|---------------------------|-------------------|
| Below 10000 pieces | 23 | 46.00 |
| 10000-20000 pieces | 20 | 40.00 |
| 20000-50000 pieces | 3 | 6.00 |
| Above 50000 pieces | 4 | 8.00 |
| Total | 50 | 100.00 |

It is found from the above table that 46% of the respondents order below 10000 pieces for per order, 40% of the respondents order between 10000-20000 pieces for per order, 8% of the respondents order above 50000 pieces for per order and 6% of the respondents order between 20000-50000 pieces for per order. It is concluded that majority of the respondents order below 1 0000 pieces for per order.

| Required delivery time | No. of Respondents | Percentage |
|-------------------------------|---------------------------|-------------------|
| Below 45 days | 1 | 2.00 |
| 45-60 days | 28 | 56.00 |
| 60-90 days | 19 | 38.00 |
| Above 90 days | 2 | 4.00 |
| Total | 50 | 100.00 |

It is observed from the above table that 56% of the respondents required 45-60 days, 38% of the respondents required 60-90 days, 4% of the respondents required above 90 days and 2% of the respondents required below 45 days as delivery time. It is concluded that majority of the respondents required 45-60 days as delivery time.

| Quality level preferred | No. of Respondents | Percentage |
|-------------------------|--------------------|------------|
| AQL 1.0 | 4 | 8.00 |
| AQL 1.5 | 16 | 32.00 |
| AQL 2.5 | 24 | 48.00 |
| AQL 4 | 6 | 12.00 |
| Total | 50 | 100.00 |

It is inferred from the above table that 48% of the buyers prefer AQL 2.5, 32% of the buyers prefer AQL 1.5, 12% of the buyers prefer AQL 4 and 8% of the buyers prefer AQL 1.0 as quality level. It is concluded that majority of the buyers prefer AQL 2.5 as quality level.

| Shortage Quantity | No. of Respondents | Percentage |
|-------------------|--------------------|------------|
| No Shortage | 18 | 36.00 |
| 3% shortage | 8 | 16.00 |
| 5% shortage | 23 | 46.00 |
| Above 5% shortage | 1 | 2.00 |
| Total | 50 | 100.00 |

It is observed from the above table that 46% of the buyer allows 5% shortage on quantity level, 36% of the buyer doesn't allow any shortage on quantity level. 16% of the buyer allows 3% shortage on quantity level and 2% of the buyer allows above 5% shortage on quantity level. It is concluded that majority of the buyer allows 5% shortage on quantity level.

| Mode of Shipment | No. of Respondents | Percentage |
|---------------------|--------------------|------------|
| Sea | 38 | 76.00 |
| Air | 0 | 0.00 |
| Combination of both | 12 | 24.00 |
| Total | 50 | 100.00 |

It is obtained from the above table that 76% of buyers prefer sea for mode of shipment and 24% of the buyers prefer combination of both sea and air for mode of shipment. It is concluded that majority of the buyers prefer sea for mode of shipment.

| Inco-terms preferred | No. of Respondents | Percentage |
|----------------------|--------------------|------------|
| FOB | 39 | 78.00 |
| CFR | 3 | 6.00 |
| OF | 6 | 12.00 |
| Combination of all | 2 | 4.00 |
| Total | 50 | 100.00 |

It is clear from the above table that 78% of the buyer prefers FOB, 12% of the buyer prefers OF, 6% of the buyer prefers CFR and 4% of the buyer prefers combination all INCO terms. It is concluded that majority of the buyer prefer FOB as INCO-terms.

| Mode of Payment | No. of Respondents | Percentage |
|---------------------------|---------------------------|-------------------|
| Letter of credit | 37 | 74.00 |
| Cash on telegraphic trade | 11 | 22.00 |
| Cash in advance | a | 0.00 |
| Credit | 2 | 4.00 |
| Total | 50 | 100.00 |

It is found from the above table that 74% of the buyer prefers letter of credit for payment, 22% of the buyer prefers cash on telegraphic trade for payment and 4% of the buyer prefers credit payment. It is concluded that majority of the buyer prefers letter of credit for payment.

| Price level | No. of Respondents | Percentage |
|--------------------|---------------------------|-------------------|
| Low price | 8 | 16.00 |
| Normal price | 32 | 64.00 |
| High price | 10 | 20.00 |
| Total | 50 | 100.00 |

It is observed from the above table that 64% of the buyers are buying at normal price, 20% of the buyers are buying at high price and 16% of the buyers are buying at low price. It is concluded that majority of the buyers are buying at normal price.

| Excess quantity | No. of Respondents | Percentage |
|------------------------|---------------------------|-------------------|
| No excess | 18 | 36.00 |
| 3% | 7 | 14.00 |
| 5% | 25 | 50.00 |
| Total | 50 | 94.00 |

It is obtained from the above table that 50% of the buyers are accepted 5% of excess quantity, 36% of the buyers doesn't accept any excess quantity level and 14% of the buyers are accepted 3% of excess quantity. It is concluded that majority of the buyers are accepted 5% of excess quantity.

| Code of conduct | No. of Respondents | Percentage |
|------------------------|---------------------------|-------------------|
| SA8000 | 7 | 14.00 |
| WRAP | 15 | 30.00 |
| OHSAS | 5 | 10.00 |
| ISO 14000 | 5 | 10.00 |
| SEDEX | 8 | 16.00 |
| None | 10 | 20.00 |
| Total | 50 | 100.00 |

It is inferred from the above table that 30% of the buyer prefers WRAP, 20% of the buyer don't prefer any code of conduct, 16% of the buyer prefers SEDEX, 14% of the buyer prefers SA 8000, and 10% of the buyers prefer OHSAS and ISO 14000 for conducting. It is concluded that majority of the buyer prefers WRAP for conducting.

| Standards quality | No. of Respondents | Percentage |
|--------------------------|---------------------------|-------------------|
| ASTM | 0 | 0.00 |
| AATCC | 24 | 48.00 |
| ISO 9001 | 10 | 20.00 |
| ANSI | 1 | 2.00 |
| SGS | 2 | 4.00 |
| None | 13 | 26.00 |
| Total | 50 | 100.00 |

It is observed from the above table that 48% of the buyers required AATCC for standard quality, 26% of the buyer don't required any standard quality, 20% of the buyers required ISO 9000 for standard quality, 4% of the buyers required SGS for standard quality and 2% of the buyers required ANSI for standard quality. It is concluded that majority of the buyers required AATCC for standard quality.

Findings and Suggestions

The findings of the study are as follows:

- ☞ Majority (28%) of the buyers are from UK
- ☞ Majority (27.4%) of the buyers prefers kid's wear and ladies wear.
- ☞ Majority (46%) of the respondents order below 10000 pieces for per order
- ☞ Majority (56%) of the respondents required 45-60 days as delivery time.
- ☞ Majority (48%) of the buyers prefer AQL 2.5 as quality level.
- ☞ Majority (46%) of the buyer allows 5% shortage on quantity level.
- ☞ Majority (76%) of the buyers prefer sea for mode of shipment.
- ☞ Majority (78%) of the buyer prefer FOB as Inco - terms.
- ☞ Majority (74%) of the buyer prefers letter of credit for payment.
- ☞ Majority (64%) of the buyers are buying at normal price.
- ☞ Majority (50%) of the buyers are accepted 5% of excess quantity.
- ☞ Majority (30%) of the buyer prefers WRAP for conducting.
- ☞ Majority (48%) of the buyers required AATCC for standard quality.

Suggestions

The manufacturers should consider the country of the buyer before dealing with them. They have to understand the requirements of the buyers on the basis of quality, price, delivery time, short quantities, international commercial terms, AQL level etc. The buyers who preferred the quality level "AQL 1.0" won't accept the shortage or excess quantity level. So the manufacturer should act according to that to prohibit the loss. The textile and garment units in India have to implement the following points:

Quality Control and Testing

The Textile Industry in India, although more and more units have recognized the importance of quality control there are still others where there is unfortunately not as much analytical quality control as one would desire to have. More things are achieved by

the rule of the thumb. A single incidence of poor quality overly influences customers so much that they tell at least ten other prospective buyers to stay away from them. Achieving perception of quality is usually impossible unless quality claim has substance. Generating high quality requires an understanding of what quality means to customers segments as well as supportive culture and a quality improvement process that will enable the organization to deliver quality products and services consistently. It is seen that 90% Defects found in textiles are due to inadequate preparation of fabric during processing i.e. before dyeing and are noticed after dyeing cycle is over or printing process is over. Production of good quality fabric requires efficient and continuous online monitoring of production process.

Training of work force

Train them about modern machinery and how to operate.

Fulfillment of commitments

One must ensure that deadlines given by clients are satisfied.

No delays in deliveries

It should be seen that all deliveries are meeting the deadlines so that cost of returned goods is minimized.

Consciousness about quality

To produce the best quality fabric and garment based on best usage of chemicals and dyes. The fabric quality should meet the GOTS requirements and various other specified certifications.

Discipline

Timely deliveries, punctuality in the Organization are factors to be considered here.

Guidance

To give proper guidance and instructions to the assistants, subordinates, workers, supervisors, etc.

No neglecting maintenance

The maintenance of m/c's should carried out at least once in a month and also ensure that all the outgoing effluent is treated well so that environmental pollution is reduced.

Training through Institutions

If some institutions take up imparting of training the work force and exporters realize the necessity and compel the work force to take training the overseas orders will increase. Instead of imparting training only to executives and supervisors it should be extended to the primary workforce also. Training on job should be gone equally to the lowest and highest level of management. Then only organization can progress.

Awareness about latest technologies

There is a lack of awareness of latest technologies in textile industry. Only a few big players are having state-of-art technology machinery and the rest of others are working with conventional methods. This leads to production of qualities not matching International standards and hence fewer exports of garments and fabrics. To provide

consistency products newer technologies have to be adopted. New technologies not only help in environment friendliness but are also cost-effective. In arena of fabric dyeing there are tremendous improvements technologies like E-control for dyeing cotton without salt, then Air flow for dyeing with liquor ratios 1:3. These technologies provide Right First Time dyeing along with minimal chemical load to the environment. ETP (Effluent Treatment Plant) Zero discharge means Recycling water from the effluent treatment and using it back into processing without a single drop purged out to the environment. Since ETP requires high maintenance, substantial capital investment and high operating costs this would be of great advantage.

India has to rapidly modernize. Various kinds of modern machines for printing the garment, embroidery machines etc have been innovated and can be used for manufacturing cost-effective garments. The industry must work on economies of scale which directly affects the price-value realization. Also adequate infrastructure and adequate utilities (power and water) must be available for wet processing of fabric. Indian industries are still concerned with regard to availability of good quality water and scarcity of power. With the advent of new technologies coming into India in the processing sector (Like Eco-control, moist cross linking based resin finishes and so on.) there will be a good exposure of these technologies at the operating level, which has lot of scope for improvement in the textile and apparel industry.

Concentrate on Strengths

India has to concentrate on its strengths and capitalize on it to improve its share in global textile and clothing and garment business. We might have the best of technologies and experts in our own country but we must ensure that we also have adequate resources and other utilities to use these technologies and expertise to our advantage.

Indian exports are becoming uncompetitive due to competition from neighbouring Asian countries. International market is highly sensitive and competitive and if shipments do not reach within stipulated time, there will be a lot of cancellation of orders and substantial loss to the exporters from overseas market. There should be speedy movement of export cargo to avoid huge backlogs at the cargo complex. To provide right quality in all aspects an organization function with correct process being done right at the beginning so as to reduce loss in wasteful practices. The total organizational workforce right from the lowest to the highest order equally shares responsibility and commitment for quality improvement. With growing competitiveness and increasing challenges from Chinese and other S. East Asian countries, our apparel export industry needs scientific solution. In Textile units, management must be quick and prompt in attending the valid and genuine problems of the supervisors. We need more matured leadership rather than unplanned supervision to meet the quality needs of the buyer.

Job Security

The fear of losing job should be eliminated and job security should be guaranteed. The Human Resource Department should be efficient enough to provide the requisite workforce on time and retain skilled ones for longer periods of time. Daily targets without concrete plans to achieve them only leads to more of defective products. A

target driven production system fails to achieve productivity and quality if commitments are not fulfilled. We need to emphasize more on result-oriented system and not just on the target. One must involve all the workers, supervisors, managers alike in the qualitative improvement programmes of the organization. Employee involvement and empowerment leads to productivity and quality improvement. Once an industry achieves control over their business and profitability then it can go for modernization with latest technology machines like continuous processing etc. India is rich in designs, creativity, prints, and has diversified cultures hence there will be no dearth of orders.

Conclusion

Apparel export industry in India, is one of the major economic contributor to the Indian economy. It also faces severe competition globally from country like China, Sri Lanka, Indonesia, Vietnam etc. This study is helpful to know the requirements of the buyers from different countries. The manufactures should adapt these requirements while dealing with them to avoid the risk at the time of negotiation and order execution ant to satisfy their needs and requirements. The manufacturer who acts according to the attitude of the buyers can only be succeeded and withstand in the global market and win the race of the competitors.

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