

# Marketing Strategies To Be Adopted By The Garment Exporters After The Quota Removal In Tirupur

*\*Dr. G. B. Karthikeyan*

*\*\*Dr. A. Ramachandran*

## 1. INTRODUCTION

India is one of the world's ten largest exporters of textiles and clothing, and relies heavily on exports to sustain its industry. The export markets (about 65%) mainly cater to the United States of America (USA) and the European Union. The remaining of India's exports is spread over a number of quota countries, especially the UAE, Japan and the former Soviet Republic. India's share in the global textile and clothing market in the last decade did not grow much because of quantitative restriction on exports to the US, the EU and Canada, because of not being a member of important preferential trade agreements and because of having a lesser degree of export competitiveness than its competitors. With the abolition of quota system, the competition among developing countries for gaining export share or retaining it will depend to a great extent on the competitiveness of the country's textile and clothing sector. This study currently focuses on the issues to be concentrated upon by the Tirupur Exports to face quota removal. The complete elimination/phase-out of export quota's has brought to sharp focus, the weakness of India garment export industry as well as the exciting opportunities to carve out an ambitious but achievable share in the global clothing imports. The jockeying for position among current competitors will be determined by the forces governing competition. In the race for being ahead of competition, "sustainable competitive advantage" is central to the strategy. Sustainable advantage depends on three aspects:

a) **Size in the target market** - it culminates in the expansion of marketing, establishing brand name for products, taking into account the market selection strategy adopted by the buyers. b) **Superior access to resources**-this may probe into the insights of sourcing decisions. The orders from the buyers now- a -days are more dynamic - it not only includes the value addition but also fabric texture to be imported from different places, and the promotional avenues which has to be concentrated to meet it's own competitors. c) **Driving strategies to win markets**-which needs immediate focus on uplifting the technology, increasing the investment capacity at the level need, paying attention towards high quality supply chain management and removing the investment bottle necks which tamper the export market to the maximum extent.

## 2. STATEMENT OF THE PROBLEM

The Tirupur exporters produce quality knitted products and send their products of export to EU, USA, and other major markets in the world. The marketing strategies which they have adopted need a ramification as the garment industry is alarmed of Quota removal. As the world is now thrown open to the Tirupur exporters to sell their products, Tirupur exporters have to concentrate on their marketing strategies, branding, Investment factors, and market selection. The study aims to answer the following question: By changing the existing strategies, will Tirupur garment exporters be able to combat the disadvantages arising due to the Quota removal System?

## 3. OBJECTIVES OF THE STUDY

The following are the objectives of the study:

1. To analyze the marketing strategies, brand name establishment and driving factors to be adopted by the Tirupur exporters after the quota removal.
2. To analyze the benefits of technology upgradation fund and reasons for investment after quota removal.

## 4. METHODOLOGY, TOOLS AND TECHNIQUES

The study is based on the primary data and the necessary data required for the study were collected through the structured questionnaire. Two hundred and six knitted garment exporters were selected as sample respondents for the study on the basis of random sampling method by using Tipett's table. To analyze the objectives of the study, percentage analysis and two way tables were used.

## 5. RESULTS AND DISCUSSION

The following results and discussion are derived from the study:

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*\* Faculty, Department of Management Studies, Hindusthan College of Arts and Science, Coimbatore, Tamil Nadu.*

*E-mail: varshinidat\_2006@yahoo.co.in*

*\*\* Director, SNR Institute of Management Sciences, SNR Sons College (Autonomous), Coimbatore -641 006, Tamil Nadu. E-mail: ram1200@rediffmail.com*

The table 1 clearly explains the marketing strategies adopted by the Tirupur exporters. 34.47 per cent of the exporters have buyers marketing wing, 23.30 per cent of the exporters have their own marketing setup, 20.87 per cent of the exporters stated that they have associations to help in the area of marketing products, the least of 20.87 per cent of the exporters market products through trade and fashion shows, exhibition, etc.

**Table 1 : Marketing Strategies**

| Sl. No. | Marketing strategies               | No. of respondents | Percent       |
|---------|------------------------------------|--------------------|---------------|
| 1.      | Own marketing set up               | 48                 | 23.30         |
| 2.      | Buyers marketing wing              | 71                 | 34.47         |
| 3.      | Exporter's association             | 44                 | 21.36         |
| 4.      | Trade, fashion shows & Exhibitions | 43                 | 20.87         |
|         | <b>Total</b>                       | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data

**Table 2: Establishment of Brand Name for Products**

| Sl. No | Establishment of brand name for products | No. of respondents | Percent       |
|--------|--|--------------------|---------------|
| 1      | Established                              | 127                | 61.65         |
| 2      | Not established                          | 79                 | 38.35         |
|        | <b>Total</b>                             | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data

The table 2 indicates that the Tirupur exporters have established a brand name for their products. 61.65 per cent of the exporters have established a brand name and the remaining 38.35 per cent of the exporters have not established a brand name for their products.

**Table 3 : Number of Brands Owned**

| Sl. No | Number of brands owned | No. of respondents | Percent       |
|--------|------------------------|--------------------|---------------|
| 1      | One                    | 40                 | 19.42         |
| 2      | Two                    | 63                 | 30.58         |
| 3      | Three                  | 20                 | 9.71          |
| 4      | More than three        | 83                 | 40.29         |
|        | <b>Total</b>           | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data

The table 3 illustrates the number of brand names owned by the Tirupur exporters. 40.29 per cent of the exporters own more than three brand names, 30.58 per cent of the exporters own two brand names, 19.42 per cent of the exporters possess one brand name and the least of 9.71 per cent of the exporters possess more than three brand names.

**Table 4: Brands Operated in Markets**

| Sl. No | Brands Operated in Markets | No. of respondents | Percent       |
|--------|----------------------------|--------------------|---------------|
| 1      | Domestic market            | 36                 | 17.48         |
| 2      | Global market              | 113                | 54.5          |
| 3      | Both                       | 57                 | 27.67         |
|        | <b>Total</b>               | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data

The table 4 clearly indicates the usage brands. 54.5 per cent of the exporters operate brand name in the global market, 27.67 per cent of the Tirupur exporters operate brand name in both domestic market and foreign markets, and the least of 17.48 per cent of the exporters operate brand name in the domestic market only.

The table 5 clearly reason out the need for establishing the brand name for Tirupur exporters' products. 46.12 per cent of the exporters operate brand names to gain reputation in the market, 31.55 per cent of the exporters possess

it to capture the market, and the least of 22.33 per cent of the exporters operate brand names for gaining international identity.

**Table 5: Reasons for Establishing Brand Name**

| Sl. No. | Reasons for establishing brand name | No. of respondents | Percent       |
|---------|-------------------------------------|--------------------|---------------|
| 1       | Reputation                          | 95                 | 46.12         |
| 2       | International identity              | 46                 | 22.33         |
| 3       | Capture the market                  | 45                 | 31.55         |
|         | <b>Total</b>                        | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data

**Table 6: Reasons For Not Establishing Brand Name**

| Sl. No. | Reasons for not establishing brand name | No. of respondents | Percent       |
|---------|---|--------------------|---------------|
| 1       | Buyer's own brands                      | 55                 | 26.70         |
| 2       | Lack of funds                           | 18                 | 8.74          |
| 3       | More competitors                        | 131                | 63.59         |
| 4       | Not interested                          | 2                  | 0.97          |
|         | <b>Total</b>                            | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data.

The table 6 clearly explains the reason for not establishing brand names by the exporters of Tirupur. 63.59 per cent of the exporters stated that there are more number of competitors in the market and 26.70 per cent of the exporters stated that the buyers possess own brand name, 8.74 per cent of the respondents stated that they lack funds for establishing brand name, and the least of 0.97 per cent of the exporters are not interested in making own brand name.

**Table 7 : Nature of Buyers In Contact**

| Sl. No. | Nature of buyers in contact               | No. of respondents | Percent       |
|---------|---|--------------------|---------------|
| 1       | Fashion oriented companies                | 32                 | 15.53         |
| 2       | Department stores                         | 44                 | 21.36         |
| 3       | Speciality stores (brand named companies) | 57                 | 27.67         |
| 4       | Mass Merchandisers                        | 31                 | 15.05         |
| 5       | Discount chains                           | 22                 | 10.68         |
| 6       | Small importers                           | 20                 | 9.71          |
|         | <b>Total</b>                              | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data

The table 7 explains the nature of buyers in contact. 27.67 per cent of the exporters stated that speciality buyers gives them orders for production, 21.36 per cent of the respondents have stated that the Department stores gives them order, 15.53 per cent of the exporters have stated that fashion oriented companies provide orders, 15.05 per cent of the exporters have stated that mass merchandisers help in getting orders, 10.68 per cent of the exporters stated that orders are sourced through discount chains, and the least of 9.71 per cent of the exporters have stated that orders are sourced through small importers.

**Table 8: Market Selection Strategy of the Buyers**

| Sl.No | Market selection strategy of the buyers | No. of respondents | Percent       |
|-------|---|--------------------|---------------|
| 1     | High quality and high price             | 98                 | 47.57         |
| 2     | Low quality and high price              | 61                 | 29.61         |
| 3     | High quality and low price              | 22                 | 10.68         |
| 4     | Low quality and low price               | 25                 | 12.14         |
|       | <b>Total</b>                            | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data.

The table 8 clearly proves the market selection strategy adopted by the buyers in Tirupur. 47.57 per cent of the exporters stated that the buyers place orders because of the high quality and it gives high price for them, 29.61 per cent of the exporters opined that the buyers place orders because of low quality and high price, 12.14 per cent of the exporters have stated that the buyers place orders because they are in need of low quality and low price products and the least of 10.68 per cent of the buyers are giving orders because of high quality and low price products produced in Tirupur.

**Table 9: Driving Factors To Win Markets**

| Sl. No | Driving factors to win markets                     | No. of respondents | Percent       |
|--------|--|--------------------|---------------|
| 1      | Capacity building consistent with social standards | 56                 | 27.18         |
| 2      | Market oriented approach to fight competition      | 43                 | 20.87         |
| 3      | Sourcing skills and SCM efficiency                 | 15                 | 7.28          |
| 4      | Design skills and productivity                     | 45                 | 21.84         |
| 5      | Regional spread of markets                         | 29                 | 14.08         |
| 6      | Competing in product categories                    | 18                 | 8.74          |
|        | <b>Total</b>                                       | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data

The table 9 clearly explains the driving factors to be concentrated upon by the exporters to win the markets in the near future. 27.18 per cent of the Tirupur exporters felt the necessity of capacity building consistent with social standards can help in capturing the market, 21.84 per cent of the exporters feel that the design skills and productivity might improve the enhancement of marketing, 20.87 per cent of the exporters strongly believe that the market oriented approach can alone bring markets, 14.08 per cent of the exporters do believe the regional spread of markets will be the umbrella to uphold the market, 8.74 per cent of the exporters feels that they have to have a competing product categories to capture the market and the least of 7.28 per cent of the exporters believes that sourcing skills and implementing supply chain management strategies will be the driving factor in capturing the market.

**Table 10: Source for Finance for Implementing Technology Upgradation**

| Sl.No | Source for finance for implementing technology upgradation | No. of respondents | Percent       |
|-------|--|--------------------|---------------|
| 1     | Own funds  | 71                 | 34.47         |
| 2     | Borrowed funds   | 72                 | 34.95         |
| 3     | Assistance from Government organization                    | 30                 | 14.56         |
| 4     | Assistance from non-government organization                | 33                 | 16.02         |
|       | <b>Total</b>   | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data

It was understood from the Table 10 that 34.95 per cent of the exporters borrow funds for implementing technology upgradation, 34.47 per cent of the exporters do have own funds for implementing technology upgradation, 16.02 per cent of the exporters get assistance from the non- government organization and the least, 14.56 per cent of the exporters get assistance from government organizations to make the technology upgradation.

**Table 11: Awareness on TUF Scheme**

| Sl. No | Awareness on TUF scheme | No. of respondents | Percent       |
|--------|-------------------------|--------------------|---------------|
| 1      | Aware                   | 93                 | 45.15         |
| 2      | Not aware               | 113                | 54.85         |
|        | <b>Total</b>            | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data.

The table 11 clearly explains the realization of awareness on drawing technology upgradation fund by the

**Table 12: Availed Assistance Through TUF Scheme**

| Sl. No. | Availed assistance through TUF scheme | No. of respondents | Percent       |
|---------|---------------------------------------|--------------------|---------------|
| 1       | Availed                               | 93                 | 45.15         |
| 2       | Not availed                           | 113                | 54.85         |
|         | <b>Total</b>                          | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data.

exporters of Tirupur. 54.85 per cent of the exporters are unaware about the scheme of technology upgradation fund and the remaining of 45.15 per cent of the exporters are well aware of the scheme of technology upgradation fund.

The table 12 clearly indicates the availment of technology upgradation fund by the exporters of Tirupur. 54.85 per cent of the exporters have stated that they have availed the assistance of technology up gradation fund from the government and the remaining of 45.15 per cent of the exporters have not availed the assistance of technology up gradation fund from the government.

**Table 13: Benefits Enjoyed Through TUF Scheme**

| Sl. No | Benefits enjoyed through TUF scheme | No. of respondents | Percent       |
|--------|-------------------------------------|--------------------|---------------|
| 1      | Comparative interest rate           | 123                | 59.71         |
| 2      | Instant finance assistance          | 33                 | 16.02         |
| 3      | Easy legal formalities              | 37                 | 17.96         |
| 4      | Comfortable repayment procedures    | 13                 | 6.31          |
|        | <b>Total</b>                        | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data

It was clearly understood from the table 13 that 59.71 per cent of the respondents have stated that they enjoy the competitive interest rate provided on the fund , 17.96 per cent of the exporters have stated that they get easy legal formalities in availing technology up gradation fund scheme, 16.02 per cent of the exporters have stated that they get instant financial assistance from the government, and the least of 6.31 per cent of the exporters have stated that they have got comfortable repayment procedures in availing technology upgradation scheme.

**Table 14: Reasons For Not Availing Technology Upgradation**

| Sl. No. | Reasons for not availing technology upgradation | No. of respondents | Percent       |
|---------|---|--------------------|---------------|
| 1       | Lack of awareness                               | 129                | 62.62         |
| 2       | Fear of government control                      | 19                 | 9.22          |
| 3       | Availability of own funds                       | 42                 | 20.39         |
| 4       | Not interested                                  | 16                 | 7.77          |
|         | <b>Total</b>                                    | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data.

It was interesting to note from the table 14 that 62.62 per cent of the exporters have not availed the assistance of technology up gradation fund because of lack of awareness of the scheme, 20.39 per cent of the exporters have own funds to promote technology concerns, 9.22 per cent of the exporters do not avail the assistance because they have the fear of government control, and the least of 7.77 per cent of the exporters are not interested in availing such assistance.

The table 15 clearly explains the opinion of the exporters on removal of ceiling on investment. 30.58 per cent of the exporters have strongly agreed that the removal on ceiling has to be made, 31.07 per cent of the exporters are agreeing to the fact that the ceiling has to be removed, 31.07 per cent of the exporters have stated that they are neutral on the removal on ceiling, 15.53 per cent of the exporters have stated that they disagree with the facts related to the removal of ceiling and the least of 9.22 per cent of the exporters have stated that they are highly disagreeing with the fact that the ceiling on investment has to be removed.

**Table 15: Remove Ceiling on Investment**

| Sl. No. | Remove ceiling on investment | No. of respondents | Percent       |
|---------|------------------------------|--------------------|---------------|
| 1       | Strongly agree               | 63                 | 30.58         |
| 2       | Agree                        | 64                 | 31.07         |
| 3       | Neutral                      | 28                 | 13.59         |
| 4       | Disagree                     | 32                 | 15.53         |
| 5       | Highly disagree              | 19                 | 9.22          |
|         | <b>Total</b>                 | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data.

**Table 16: Plan to Adopt Integrated Supply Chain Management**

| Sl. No. | Plant to adopt integrated supply chain management | No. of respondents | Percent       |
|---------|---|--------------------|---------------|
| 1       | Willing to integrate                              | 70                 | 33.98         |
| 2       | Not willing to integrate                          | 136                | 66.02         |
|         | <b>Total</b>                                      | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data

The table 16 clearly portrays the plan of adopting integrating supply chain management in the concern. 66.02 per cent of the exporters are not willing to integrate supply chain management in the export business, and the remaining 33.98 per cent of the exporters are willing to integrate supply chain management.

**Table 17: Reasons for Investment After Quota Removal**

| Sl. No | Reasons for investment after quota removal        | No. of respondents | Percent       |
|--------|---|--------------------|---------------|
| 1      | Front end and building up to marketing capability | 66                 | 32.04         |
| 2      | Professional management skills                    | 58                 | 28.16         |
| 3      | Cutting edge design capability                    | 27                 | 13.11         |
| 4      | SCM   | 32                 | 15.53         |
| 5      | CRM   | 23                 | 11.17         |
|        | <b>Total</b>                                      | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data

The table 17 clearly indicates the reasons for investing after quota removal. 32.04 per cent of the exporters made investment on front end and building upto marketing capability, 28.16 per cent of the exporters have invested to develop professional management skills, 15.53 per cent of the exporters wants to implement supply chain management in business, 13.11 per cent of the exporters have invested to improve customer relationship management, and 13.11 per cent of the exporters have invested in developing cutting edge design capability.

**Table 18 : Utilization of Import Benefits Provided by the Government**

| Sl. No | Utilization import benefits provided by the government | No. of respondents | Percent       |
|--------|--|--------------------|---------------|
| 1      | Utilised   | 76                 | 36.89         |
| 2      | Not utilized   | 130                | 63.11         |
|        | <b>Total</b>   | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data

The table 18 clearly explains the utilization of import benefits provided by the government. 63.11 per cent of the exporters have not utilized the import benefits provided by the government, and the remaining 36.89 per cent of the exporters are not utilizing the benefits provided by the government on imports.

The table 19 clearly indicates the raw material imported by the exporters of Tirupur. 39.81 per cent of the exporters import capital goods, 37.38 per cent of the exporters have imported accessories for production, 22.82 per cent of

**Table 19: Materials Imported**

| Sl. No | Materials imported | No. of respondents | Percent       |
|--------|--------------------|--------------------|---------------|
| 1      | Raw material       | 47                 | 22.82         |
| 2      | Accessories        | 77                 | 37.38         |
| 3      | Capital goods      | 82                 | 39.81         |
|        | <b>Total</b>       | <b>206</b>         | <b>100.00</b> |

Source : Computed from Primary Data

the exporters are importing raw material for production.

**Table 20 : Frequency of Importing Raw material / Accessories**

| Sl. No | Frequency of importing raw material/accessories | No. of respondents | Percent       |
|--------|---|--------------------|---------------|
| 1      | Regularly                                       | 130                | 63.11         |
| 2      | Irregularly                                     | 50                 | 24.27         |
| 3      | Often   | 26                 | 12.62         |
|        | <b>Total</b>                                    | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data

The table 20 clearly explains the frequency of importing raw materials and accessories. 63.11 per cent of the exporters have stated that they import raw materials regularly, and 24.27 per cent of the exporters are not importing raw material regularly and the least of 12.62 per cent of the exporters quite often import raw material for the production.

**Table 21 : Following Quality Appraisal Measures In the Concern**

| Sl. No. | Following quality appraisal measures in the concern | No. of respondents | Percent       |
|---------|---|--------------------|---------------|
| 1       | Followed  | 57                 | 27.67         |
| 2       | Not followed  | 149                | 72.33         |
|         | <b>Total</b>  | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data.

The table 21 clearly explains the quality appraisal measures adopted due to the export concerns of Tirupur. 72.33 per cent of the exporters are following quality appraisal measures in concerns, 27.67 per cent of the exporters are not following quality appraisal measures in concerns.

**Table 22: Relationship Between the Initial Investment and Product Quality Appraisal Measures**

$H_0$  : There is no significant relationship between the initial investment of the concern and the product quality appraisal measures.

| Initial investment/<br>Quality appraisal measures | Quality appraisal adopted | Not adopted   | Total      |
|---|---------------------------|---------------|------------|
| Rs.50 lakhs                                       | 57<br>(72.16)             | 90<br>(70.87) | 141        |
| Rs.50 lakhs – 1 crore                             | 16<br>(20.25)             | 33<br>(25.98) | 55         |
| Rs.Above 1 crore                                  | 6<br>(7.59)               | 4<br>(3.15)   | 10         |
| <b>Total</b>                                      | <b>79</b>                 | <b>127</b>    | <b>206</b> |

Note: The figures within parenthesis show percentages.

Chi square value = 2.666

Table value = 5.99

Level of significance = 5%.

The calculated value of  $\chi^2$  is less than the table value. Hence, the null hypothesis is accepted and it is concluded that there is no significant relationship between the initial investment of the concern and the product quality



**Table 23: Type of Policies Followed For Generating Product Quality**

| Sl. No. | Type of policies followed for generating product quality | No. of respondents | Percent       |
|---------|--|--------------------|---------------|
| 1       | Own standard quality                                     | 123                | 59.71         |
| 2       | Quality specified by the buyer                           | 41                 | 19.90         |
| 3       | Competitor's strategy                                    | 14                 | 6.80          |
| 4       | Market trend   | 28                 | 13.59         |
|         | <b>Total</b>   | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data.

appraisal measures.

The table 23 clearly explains the type of policies for generating product quality. 59.71 per cent of the exporters have their own standard of quality measurement, 19.90 per cent of the exporters follow the quality specifications specified by the buyer, 13.59 per cent of the exporters follow competitors strategy for generating product quality, and the least of 6.80 per cent of the exporters follow product quality measures according to the need of the marketing trend.

**Table 24: Reasons for Not Implementing Quality Measures**

| Sl. No. | Reasons for not implementing quality measures | No. of respondents | Percent       |
|---------|---|--------------------|---------------|
| 1       | Cost factor                                   | 167                | 81.07         |
| 2       | Not specified by the buyer                    | 24                 | 11.65         |
| 3       | Lack of proper facilities                     | 15                 | 7.28          |
|         | <b>Total</b>                                  | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data

The table 24 clearly explains the reason for not implementing quality measures. 81.07 per cent of the exporters in Tirupur are not implementing quality measures because it incurs huge cost, 11.65 per cent of the exporters are not implementing the quality measure because it was not specified by the buyer and they lack proper facilities in implementing quality measures.

**Table 25: Quality Certification Possessed**

| Sl. No | Quality certification possessed | No. of respondents | Percent       |
|--------|---------------------------------|--------------------|---------------|
| 1      | ISO certification               | 93                 | 45.15         |
| 2      | ECO-tex                         | 56                 | 27.18         |
| 3      | Others                          | 27                 | 13.11         |
| 4      | None                            | 30                 | 14.56         |
|        | <b>Total</b>                    | <b>206</b>         | <b>100.00</b> |

Source: Computed from Primary Data

It was understood from the table 25 that 45.15 per cent of the exporters possess ISO certification for concerns, 27.18 per cent of the exporters are possessing ECO-tax certification, 14.56 per cent of the exporters are not possessing any certification for concerns, 13.11 per cent of the exporters are possessing different certifications.

## 6. SUMMARY

The Tirupur knitted garment exporters in the quota-free world has to improve competitiveness in terms of product quality, reliability, sourcing flows, investment update and establishing brand names can be given top priority for the government and the industry and the advantageous factors viz., relatively low-cost labour force, a large domestic supply of fabrics and ability to manufacture a wide range of products. On the other hand, poor quality of fabrics, low productivity, poor infrastructure and complicated bureaucracy tend to reduce those advantages.

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