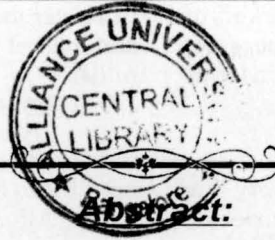


PRESENT POSITION INDIAN TEXTILE INDUSTRY



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As per the latest available WTO data, India's percentage share in the global textiles and clothing trade was 4.3% in textiles, and 3.6% in clothing during the year 2009. India's rank in world trade has been 4th in textiles and also in clothing. China is largest exporter of T&C in world. For textiles exports, US and Korea are ahead of India. Turkey and Bangladesh are ahead of India for clothing exports in world market. [88] Other remarkable position achieved by it as 2nd largest producer, consumer and exporter of Cotton and cotton yarn. It is also 2nd largest producer of staple fibre and filament yarn. It accounts for one fourth of global trade in cotton yarn.



1. Present Scenario:

There has been a distinct and positive shift from quantity to quality. Earlier Indian textiles were considered cheap and of low quality. The industry was at that time driven by large volumes, which were of paramount importance. The best quality was produced in Europe and Japan. Since then, India has come a long way, emerging as a manufacturer of high quality yarns and fabrics. The leading mills such as Raymonds, Read & Taylor, Aravind mills etc. Improved their quality standards prevailing into the world.

1.1 Problem Faced by the Textile Industry in India:

The cotton textile industry is facing many challenges. However, the major problems are as follows:

#Sickness

Sickness is widespread in the cotton textile industry. After the engineering industry, the cotton textile industry has the highest incidence of sickness. As many as 125 sick units have been taken over by the Central Government. Sickness is caused by various reasons like the problems mentioned below.

#Obsolescence:

The plant and machinery and technology employed by a number of units are obsolete. The need today is to make the industry technologically up-to-date rather than expand capacity as such. This need was foreseen quite sometime back and schemes for modernisation of textile industry had been introduced. The soft loan scheme was introduced a few years back and some units were able to take advantage of the scheme and modernise their equipment. However, the problem has not been fully tackled and it is of utmost importance that the whole industry is technologically updated. Not many companies would be able to find resources internally and will have to depend on financial

institutions and other sources.

#Government Regulations:

Government regulations like the obligation to produce controlled cloth are against the interest of the industry. During the last two decades the excessive regulations exercised by the government on the mill sector has promoted inefficiency in both production and management. This has also resulted in a colossal waste of raw materials and productive facilities. For example, the mills are not allowed to use filament yarn in warp in order to protect the interest of art silk and powerloom sector which use this yarn to cater to the affluent section of society.

Low Yield and Fluctuation of Cotton Output:

The cotton yield per hectare of land is very low in India. This results in high cost and price. Further, being largely dependent on the climatic factors, the total raw cotton production is subject to wide fluctuation causing serious problems for the mills in respect of the supply of this vital raw material.

Competition from Man-made Fibers:

One of the serious challenges facing the cotton textile industry is the competition from the man-made fibers and synthetics. These textures are gradually replacing cotton textiles. This substitution has in fact been supported by a number of people on the ground that it is not possible to increase substantially the raw cotton production without affecting other crops particularly food crops.

#Competition from other Countries:

In the international market, India has been facing severe competition from other countries like Taiwan, South Korea, China and Japan. The high cost of production of the Indian industry is a serious adverse factor.

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Labour Problems:

The cotton textile industry is frequently plagued by labour problems. The very long strike of the textile workers of Bombay caused losses amounting to millions of rupees not only to the workers and industry but also to the nation in terms of excise and other taxes and exports.

Accumulation of Stock:

At times the industry faces the problems of very low off take of stocks resulting in accumulation of huge stocks. The situation leads to price cuts and the like leading to loss or low profits.

Miscellaneous:

The industry faces a number of other problems like power cuts, infrastructural problems, lack of finance, exorbitant rise in raw material prices and production costs etc. [89]

1.2 India's Major Competitors In the World

To understand India's position among other textile producing countries the industry contributes 9% of GDP and 35% of foreign exchange earning, India's share in global exports is only 3% compared to China's 13.75% percent. In addition to China, other developing countries are emerging as serious competitive threats to India. Looking at export shares, Korea (6%) and Taiwan (5.5%) are ahead of India, while Turkey (2.9%) has already caught up and others like Thailand (2.3%) and Indonesia (2%) are not much further behind. The reason for this development is the fact that India lags behind these countries in investment levels, technology, quality and logistics. If India were competitive in some key segments it could serve as a basis for building a modern industry, but there is no evidence of such signs, except to some extent in the spinning industry.

Implementation of New Equipment:

The textile industry has also become a high technology industry. No body earlier could have concerned that the industry would require top of the line technical skills. Present day textile machinery is fully computerized and needs totally new skills to effectively manage it.

1.3 New Marketing Trend:

On the marketing side, there has been a total change, with almost all players in the industry extending their reach to international markets. The impact of these trends on the textile industry is profound. Increasingly any company cannot sustain itself only on local market demand or only the exports. One has to look at the global markets in totality.

1.4 Competition:

This compulsion to access and compete in international markets has been perhaps one of the saving grace for the industry. Clearly the ability and necessity of meeting global competition head on, has forced the industry to upgrade its technology, product quality, cost structure and marketing skills. Truly, we have learnt more from the competitions than from ourselves.

1.5 Decentralized Sectors:

Another visible change relates to the scale of

operations. Earlier textile mills were generally reasonably large size becomes a non-constraining factor with the advent of power loom sector, which enabled small weavers to make and market their own fabrics in direct competition with large mills.

1.6 Technocrats:

Another shift in the industry is regarding entrepreneurship. Technocrats have been able to become possible to have small size spinning, weaving and processing mills. All this was earlier the domain, solely of large businesses.

1.7 Cost Consciousness:

The greater competitive pressure have highlighted the need to control cost of every type of whether it be energy, water or labor all of which were earlier taken for granted now every mill is highly cost conscious and industrial engineers keep detailed trace of every cost parameter including energy consumption including energy consumption, waste control, machine efficiency and productivity. No doubt, this will have to be an ongoing exercise. Since cost have to be ruthlessly and persistently brought down.

1.8 Labor Intensive Industry:

The textile industry being labor intensive, is slowly migrating from high cost countries, such as the United states, Europe, Japan, Australia, Taiwan and Korea. All these countries were at one time leading textile manufacturers. But with the high labor cost, capacities in these countries are being diverted elsewhere. This is happening even as the developed economies make large investments in better machinery and automatism.

1.9 Government Initiatives & Policy - Textiles Schemes:**1.9.1. The Ministry of Textiles:**

The Ministry of Textiles is responsible for policy formulation, planning, development export promotion and trade regulation in respect of the textile sector. This included all natural and manmade cellulosic fibres that go into the making of textiles, clothing and handicrafts.

The developmental activities of the Ministry are oriented towards making adequate quantities of raw material available to all sectors of the textile industry and augmenting the production of fabrics at reasonable prices from the organized and decentralized sectors of the industry. Towards this objective, the Ministry lays down guidelines for a planned and harmonious growth of various sectors of the industry. Special emphasis is given to the development of handlooms in view of its large employment potential. The Ministry monitors the techno-economic status of the industry and provides the requisite policy framework for modernization and rehabilitation. The Ministry coordinates the activities of Textiles Research Associations and lends financial support to them for undertaking research and development.

The Ministry of Textiles is headed by a Secretary who is assisted in the discharge of his duties by 4 Joint Secretaries, Economic Advisor and the Development Commissioners for Handlooms and Handicrafts, Textile Commissioner and Jute Commissioner.

The principal functional areas of the Ministry cover the following:-

- Textile Policy & Coordination
- Man-made Fibre/Filament Yarn Industry
- Cotton Textile Industry
- Jute Industry
- Silk and Silk Textile Industry
- Wool & Woolen Industry
- Decentralised Powerloom Sector
- Export Promotion
- Planning & Economic Analysis
- Integrated Finance Matters
- Information Technology

1.9.2 The Multi-Fibre Agreement (MFA):

The Multi Fibre Arrangement (MFA) governed the world trade in textiles and garments from 1974 through 2004, imposing quotas on the amount developing countries could export to developed countries. It expired on 1st of January 2005. With the end of MFA Indian textile industry will reap significant benefit. It is expected that, post-MFA, most tariff distortions would gradually disappear and firms with robust capabilities will gain in the global trade of textile and apparel. The prize is the \$360 bn market which is expected to grow to about \$600 bn by the year 2010 barely five years after the expiry of MFA.

1.9.3 National Textile Policy 2000:

For the growth and development of Indian Textile Industry and to make it more vibrant, Govt. of India passed National Textile Policy in 2000.

Objectives of Policy:

- To produce and provide good quality cloth in affordable price to fulfill different needs of customers.
- To increase the share of India in Global Textile Market.
- To increase the contribution for employment and economic growth of country.
- Facilitate the Textile Industry to attain and sustain a pre-eminent global standing in the manufacture and export of clothing.
- Liberalization of controls and regulations for the market development of different Textile Segments and to make them stronger to perform in competitive environment.
- Encourage FDI and R&D to improve the manufacturing capabilities and infrastructure under the environmental standards.
- Facilitating financial support and arrangement to sector [91]

1.9.4 Export Promotion Capital Goods (EPCG) Scheme:

To promote modernization of Indian industry, the GOI set up the Export Promotion Capital Goods (EPCG) scheme, which permits a firm importing new or Secondhand capital goods for production of articles for export to enter the capital goods at preferential tariffs, provided that the firm exports at least six times the c.i.f. value of the imported capital goods within 6 years. Any textile firm planning to modernize its operations had to import at least \$4.6 million worth of equipment to qualify for duty-free treatment under the EPCG scheme.

1.9.5 Export-Import Policy:

The GOIs EXIM policy provides for a variety of largely export-related assistance to firms engaged in the manufacture and trade of textile products. This policy includes fiscal and other trade and investment incentives contained in various programs.

1.9.6 Duty Entitlement Passbook Scheme (DEPS):

DEPS is available to Indian export companies and traders on a pre- and post-export basis. The pre-export credit requires that the beneficiary firm has exported during the preceding 3-year period. The post-export credit is a transferable credit that exporters of finished goods can use to pay or offset customs duties on subsequent imports of any unrestricted products.

1.9.7. The Agreement on Textiles and Clothing (ATC):

The Agreement on Textiles and Clothing (ATC) promises abolition of all quota restrictions in international trade in textiles and clothing by the year 2005. This provides tremendous scope for export expansion from developing countries.

1.9.8 Guidelines of the revised Textile Centres Infrastructure Development Scheme (TCIDS):

TCIDS Scheme is a part of the drive to improve infrastructure facilities at potential Textile growth centres and therefore, aims at removing bottlenecks in exports so as to achieve the target of US\$ 50 billion by 2010 as envisaged in the National Textile Policy, 2000.

Under the Scheme funds can be given to Central/ State Government Departments/ Public Sector Undertakings/ Other Central /State Governments agencies/recognized industrial association or entrepreneur bodies for development of infrastructure directly benefiting the textile units. The fund would not be available for individual production units.

1.9.9 Technology Upgradation Fund Scheme (TUFS):

At present, the only scheme through which Government can assist the industry is the Technology Upgradation Fund Scheme (TUFS) which provides for reimbursing 5% interest on the loans/finance raised from designated financial institutions for benchmark projects of modernisation. IDBI, SIDBI, IFCI have been designated as nodal agencies for large and medium small scale industry and jute industry respectively. They have co-opted 148 leading commercial banks/cooperative banks and financial institutions like State Finance Corporations and State Industrial Development Corporation etc.

1.9.10 Scheme for Integrated Textile Parks (SITP):

To provide the industry with world class infrastructure facilities for setting up their textile units, Government has launched the Scheme for Integrated Textile Parks (SITP) by merging the Scheme for Apparel Parks for Exports (APE) and Textile Centre Infrastructure Development Scheme (TCIDS). This scheme is based on Public-Private Partnership (PPP) and envisages engaging of a professional agency for project execution. The Ministry of Textiles (MOT) would implement the Scheme through Special Purpose Vehicles (SPVs).

1.9.11 National Textile Corporation Ltd. (NTC):

National Textile Corporation Ltd. (NTC) is the single largest Textile Central Public Sector Enterprise under Ministry of Textiles managing 52 Textile Mills through its 9 Subsidiary Companies spread all over India. The headquarters of the Holding Company is at New Delhi. The strength of the group is around 22000 employees. The annual turnover of the Company in the year 2004-05 was approximately Rs.638 crores having capacity of 11 lakhs Spindles, 1500 Looms producing 450 lakh Kgs of Yarn and 185 lakh Mtrs of cloth annually.

1.9.12 Cotton Corporation Of India Ltd. (CCI):

The Cotton Corporation of India Ltd (CCI), Mumbai, is a profit-making Public Sector Undertaking under the Ministry of Textiles engaged in commercial trading of cotton. The CCI also undertakes Minimum Support Price Operation (MSP) on behalf of the Government of India.

CCI was established on 31st July 1970 as a Government Company registered under the Companies Act 1956. In the initial period of setting up, as an Agency in Public Sector, Corporation was charged with the responsibility of equitable distribution of cotton among the different constituents of the industry and to serve as a vehicle for the canalization of imports of cotton.

With the changing cotton scenario, the role and functions of the Corporation were also reviewed and revised from time to time. As per the Policy directives from the Ministry of Textiles, Government of India in 1985, the Corporation is nominated as the Nodal Agency of Government of India, for undertaking Price Support Operations, whenever the prices of kapas (seed cotton) touch the support level. As per this Textile Policy of 1985, the specific role assigned to the Corporation, in brief, is as under:

- To undertake price support operations, whenever the market prices of kapas touch the support prices announced by the Government of India, without any quantitative limit;
- To undertake commercial operations only at CCI's own risk;
- To purchase cotton to fulfill the export commitments; &
- To act as implementing agency for Mini Missions III & IV of TMC.

As a Nodal Agency of Government of India to undertake price support operations, Corporation keeps itself in preparedness to meet the eventualities of price support operations. As and when kapas prices touch the level of Minimum Support Price (MSP), kapas purchases are made under MSP operations without any quantitative limits. Under these MSP operations, cotton farmers are free to offer their kapas produce to CCI and Corporation continues purchases of such kapas till the prices rule at MSP level. [92]

1.9.13 Powerloom development and export promotion council:

- The main objectives of the PDEXCIL is to promote, support, develop, advance and increase powerlooms and export of Powerloom fabrics and made-ups thereof and to carry out any such activity in such manner as may be necessary or expedient.
- To undertake or assist in research in methods, designs, etc., and schemes of a technical nature intended to

improve the efficiency of the powerloom sector.

- PDEXCIL is constantly carrying out its developmental & export promotional activities to boost the exports by way of participation in the International Textile Exhibitions, gathering market information, survey, dissemination of trade enquiries, giving information about the latest development in the export front, latest notifications, circulars etc. as well as taking up the cause of the powerloom sector with relevant authorities. The Council is constantly serving powerloom industry at large in general & its members in particular, to remove hurdles in export and provide platform to the exporters.
- PDEXCIL has been actively involved in urging manufacturers to achieve quality benchmarked through up-gradation of technology. Various seminars are organised to create awareness and encourage powerloom units to modernize under the Technology Up-gradation Fund (TUF) Scheme.
- PDEXCIL is carrying out the following activities & after becoming the member they can avail the various benefits viz;
- Participation in Trade Fairs and Exhibitions abroad which helps to find importers / buyers abroad.
- Members of the PDEXCIL can avail MDA grant (financial assistance from the Govt. of India through PDEXCIL, on air travel / stall charges) subject to certain conditions as per the MDA guidelines while participating in the Trade Fairs, Exhibitions.
- PDEXCIL organises seminars at different clusters to create awareness about the need to export, giving details of the market direction & other details related to exports through Powerloom Centre Development Committee (PCDC).
- Member can participate & display their products to the visitors in the Buyer-Seller Meets organised by the PDEXCIL within India at a very nominal cost.
- Enthusing the powerloom units in various clusters to undertake upgradation of technology and modernization of the units, under the Technology Upgradation Fund Scheme (TUFS)/Modified Group Work Shed Scheme.
- Represent members cause to the various Govt. agencies.
- Organizing various training programmes/workshops/seminars to educate the Entrepreneurs on various business related issues.
- Assistance in resolving manufacturers / exporters problems.
- Exploration of overseas markets.
- Identification of saleable items.
- Deputation of sales-oriented research teams and trade delegations to foreign markets.
- PDEXCIL publishes Newsletter, to disseminate valuable market information's & other information's.

1.9.14 Cotton Textile Export Promotion Council (TEXPROCIL):

The Cotton Textiles Export Promotion Council (TEXPROCIL) is a non-profit making, export promotion body under the aegis of Ministry of Textiles and Ministry of Commerce, Government of India With membership strength of about 4000 Indian cotton textile manufacturer and merchant exporters, Texprocil conducts wide ambit of activities aimed at enhancing the country's exports of cotton textile products.

The functions of TEXPROCIL:

Disseminates information for setting the sector's Annual Export Target in line with Government of India . Offers suggestions for Foreign Trade Policy and Union Budget in line with various measures to be undertaken for reforms

Acts as an interface between exporters and various Government of India Bodies like DGFT, Customs, Central Excise, RBI, EXIM Bank etc on policy matters related to exports Organises various Promotional Activities in India and Abroad under MDA/MAI scheme of Government of India Disseminates useful trade information to member exporters regarding buyer enquiries, trade opportunities, market reports, country reports, trade statistics etc., by means of various print publications, EServe, ENews and hosting in the Council's Website on a regular basis Provides information to overseas buyers for sourcing from India and match them with their requirements Develops network & contacts with Indian missions abroad and local trade bodies to assist the member exporters to penetrate overseas market Undertakes publicity campaign and brings out publications, film, CDs, market survey reports etc. on regular basis besides this.

1.10 Other Government Initiatives:

The Government of India has promoted a number of export promotion policies for the Textile sector in the Union Budget 2011-12 and the Foreign Trade Policy 2009-14. This also includes the various incentives under Focus Market Scheme and Focus Product Scheme; broad basing the coverage of Market Linked Focus Product Scheme for textile products and extension of Market Linked Focus Product Scheme etc. to increase the Indian shares in the global trade of textiles and clothing. The various schemes and promotions by the Government of India are as follows

1. Foreign Direct Investment (FDI):

It has allowed 100 per cent Foreign Direct Investment (FDI) in textiles under the automatic route.

2. Welfare Schemes:

The Government has offered health insurance coverage and life insurance coverage to 161.10 million weavers and ancillary workers under the Handloom Weavers' Comprehensive Welfare Scheme, while 733,000 artisans were provided health coverage under the Rajiv Gandhi Shilpi Swasthya Bima Yojna.

3. E-Marketing:

The Central Cottage Industries Corporation of India (CCIC), and the Handicrafts and Handlooms Export Corporation of India (HHEC) have developed a number of e-marketing platforms to simplify marketing issues. Also, a number of marketing initiatives have been taken up to promote niche handloom and handicraft products with the help of 600 events all over the country.

4. Skill Development:

As per the 12th Five Year Plan, the Integrated Skill Development Scheme aims to train over 2,675,000 people within the next 5 years (this would cover over 270,000 people

during the first two years and the rest during the remaining three years). This scheme would cover all sub sectors of the textile sector such as Textiles and Apparel; Handicrafts; Handlooms; Jute; and Sericulture.

5. Credit Linkages:

As per the Credit Guarantee program, over 25,000 Artisan Credit Cards have been supplied to artisans, and 16.50 million additional applications for issuing up credit cards have been forwarded to banks for further consideration with regards to the Credit Linkage scheme.

6. Financial package for waiver of overdues:

The Government of India has announced a package of US\$ 604.56 million to waive of overdue loans in the handloom sector. This also includes the waiver of overdue loans and interest till 31st March, 2010, for loans disbursed to handloom sector. This is expected to benefit at least 300,000 handloom weavers of the industry and 15,000 cooperative societies.

7. Textiles Parks:

The Indian Government has given approval to 40 new Textiles Parks to be set up and this would be executed over a period of 36 months. The new Textiles Parks would leverage employment to 400,000 textiles workers. The product mix in these parks would include apparels and garments parks, hosiery parks, silk parks, processing parks, technical textiles including medical textiles, carpet and power loom parks.

8. Recent Developments:

Along with the increasing export figures in the Indian Apparel sector in the country, Bangladesh is planning to set up two Special Economic Zones (SEZ) for attracting Indian companies, in view of the duty free trade between the two countries. The two SEZs are intended to come up on 100-acre plots of land in Kishoreganj and Chattak, in Bangladesh.

Italian luxury major Canali has entered into a 51:49 Joint Venture with Genesis Luxury Fashion, which currently has distribution rights of Canali-branded products in India. The company will now sell Canali branded products in India exclusively.

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