81st Plenary Meeting of the International Cotton Advisory Committee

PROSPECTS FOR INVESTMENT DESTINATIONS
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- Prospective Investment Destinations – PM MITRA Parks
- Kakatiya Mega Textile Park
- Telangana Cotton
**PM MITRA – Objectives**

Help achieve UN SDG 9 ("**Build resilient infrastructure**, promote sustainable industrialization and foster innovation")

Develop **integrated large scale and modern** industrial infrastructure facility for total value-chain of textile industry

**Reduce logistics costs** by housing entire value chain at one location and improve competitiveness of Indian Textiles

**Attract investments**, boost employment generation & augmentation of export potential

Strengthen the Indian textile industry by way of **enabling scale of operations**

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**7 MEGA INTEGRATED TEXTILE PARKS –**
Min 405 Ha per park

- **5F Vision**
- **7 Mega Integrated T&A Parks**
- **CETPs with ZLD**
- **Pre-Approvals - NSWS Portal**

- **State-of-the-art infrastructure**
- **100,000 (D) + 200,000 (I) employment per park**
- **Dedicated High and Uninterrupted Power supply**
- **Reduce Industry Fragmentation**

**EXPECTED PRIVATE INVESTMENT (7 PARKS)**
US$ 8.5 bn

**EXPECTED EMPLOYMENT (7 PARKS)**
2.1 Mn (Direct + Indirect)
PM MITRA – Concept & Structure

Enablers
- Value-chain linked manufacturing
- Govt Funding Support
- Market Linkages
- Single Window Clearance
- Focus on EoDB
- Flatted Factory Buildings
- Plug & Play Infrastructure
- Logistics Connectivity
- Educational Institutions
- Commercial Infrastructure
- Affordable Housing
- Other Social Infrastructure

Ancillary Units
- Chemicals and Dyes Suppliers
- Other Finishing Raw Material Suppliers
- Packing Material Suppliers

Manufacturing Units
- Spinning
- Knitting
- Weaving
- Finishing / Processing
- Garmenting / Made-ups

Support Infrastructure
- Plug & Play Infrastructure
- ICD
- Logistics
- Skill Development Centers
- R&D
- Testing Facilities
- Warehousing
- Workers Hostel
- Creche
- Shared Utilities (Power, Steam, Water & CETP)

Raw Materials (Fibre / Yarn)

Finished Fabric, Garments, and Home Furnishing

Telangana – Beyond Expectations
States selected based on a combination of parameters including availability of 400+ Ha of contiguous land, connectivity to site, existing ecosystem for textiles, availability of high-quality utility services at site, the aggressiveness of state’s industrial / textile policies and ESG factors.
PM MITRA – Seven Focus States

A) GUJARAT
- State GSDP (2022-23) – USD 293 Bn
- Top cotton producing state
  - 60% of India’s cotton exports
  - 26% of India’s cotton production
- Textile Industry:
  - Largest producer of synthetic fabric in India
  - 18+ textile clusters
  - 10.5 mil people employed
- Park Location: Navsari
  - Provision for ICD, container station, container terminal in proximity
  - Excellent connectivity – Air, Water, Rail, Road

B) KARNATAKA

C) MADHYA PRADESH

D) MAHARASHTRA

E) TAMIL NADU

F) TELANGANA

G) UTTAR PRADESH

Telangana – Beyond Expectations
PM MITRA – Seven Focus States

A) GUJARAT
- State GSDP (2022-23) – USD 251 Bn

B) KARNATAKA
- Textile Industry
  - 8% of India’s T&A exports
  - 20% of India’s apparel production
  - 2000+ Garment Units
  - Clusters: Bengaluru, Bellari

C) MADHYA PRADESH

D) MAHARASHTRA

E) TAMIL NADU

F) TELANGANA
- Park Location: Kalaburagi
  - Inland Container Depot (ICD) planned in the park
  - Uninterrupted power supply from Saradgi dam
  - Excellent connectivity – Air, Water, Rail, Road

G) UTTAR PRADESH
PM MITRA – Seven Focus States

A) GUJARAT
- State GSDP (2022-23) – USD 153 Bn
- Textile Industry
  - 2.5 mil spindle capacity
  - 70+ textile mills, 965+ garment units
  - Clusters: Indore, Dewas, Ujjain, Dhar, Khandwa, Pithampur, Khargone, Burhanpur, Chhindwara, Jabalpur, Gwalior and Bhopal
- Park Location: Dhar
  - Ready industrial infrastructure for entire value chain
  - Dedicated freight corridor

B) KARNATAKA

C) MADHYA PRADESH

D) MAHARASHTRA

E) TAMIL NADU

F) TELANGANA

G) UTTAR PRADESH
PM MITRA – Seven Focus States

A) GUJARAT
- State GSDP (2022-23) – USD 435 Bn
  - Largest GSDP in India
- 2nd largest cotton producing state in India
  - 25% of India’s cotton production
- Textile Industry –
  - 3rd largest exporter in textiles and apparels
  - 10% of India’s T&A production
- Park Location: Amravati
  - 220 kV Power, 50 MLD Water, 5 MLD CETP

B) KARNATAKA

C) MADHYA PRADESH

D) MAHARASHTRA

E) TAMIL NADU

F) TELANGANA

G) UTTAR PRADESH
A) GUJARAT

- State GSDP (2022-23) – USD 331 Bn
- Textile Industry
  - 30% of India’s Textile business
  - 45% of India’s spinning capacity
  - 20% of India’s RMG exports
- Clusters: Karur, Erode, Tirupur, Coimbatore, Rajapalayam, Madurai and Dindigul
- Park Location: Virudhnagar
  - Dedicated manufacturing zones – Apparel, Processing, Technical Textiles, Knitwear and Logistics

B) KARNATAKA

C) MADHYA PRADESH

D) MAHARASHTRA

E) TAMIL NADU

F) TELANGANA

G) UTTAR PRADESH

PM MITRA – Seven Focus States
A) GUJARAT
- State GSDP (2022-23) – 160 USD
- Highest per capita income in India
- Cotton
  - 3rd largest cotton producing state in India
  - 17% of India’s cotton production
- Textile Industry
  - 1 mil spindle spinning capacity
  - Clusters: Sircilla, Warangal

B) KARNATAKA

C) MADHYA PRADESH

D) MAHARASHTRA

E) TAMIL NADU

F) TELANGANA
- Park Location: Warangal
  - Spread over 486 Ha
  - 220 kV Power, 12 MLD Water, 10 MLD CETP with ZLD

G) UTTAR PRADESH
PM MITRA – Seven Focus States

A) GUJARAT
- State GSDP (2022-23) – USD 273 Bn
- ~8% contribution to India GDP
- Largest Rail Network
- 2nd largest National Highways network

B) KARNATAKA
- Textile Industry
  - 13% of India’s fabric production (3rd largest)
  - 90% of India’s carpet production
  - Clusters: Major RMG cluster at Gautam Budh Nagar (3000 units)

C) MADHYA PRADESH

D) MAHARASHTRA

E) TAMIL NADU

F) TELANGANA

G) UTTAR PRADESH
- Park Location: Lucknow / Hardoi
  - Excellent connectivity-Air, Rail, Road being within state capital
KAKATIYA MEGA TEXTILE PARK, TELANGANA
### Telangana Overview

#### Per Capita Income at Current Prices for Telangana and India (2014-15 to 2022-23) – USD per capita

<table>
<thead>
<tr>
<th>Year</th>
<th>Telangana</th>
<th>All India</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014-15</td>
<td>1504</td>
<td>1050</td>
</tr>
<tr>
<td>2015-16</td>
<td>1707</td>
<td>1149</td>
</tr>
<tr>
<td>2016-17</td>
<td>1932</td>
<td>1259</td>
</tr>
<tr>
<td>2017-18</td>
<td>2174</td>
<td>1397</td>
</tr>
<tr>
<td>2018-19</td>
<td>2544</td>
<td>1527</td>
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<tr>
<td>2019-20</td>
<td>2805</td>
<td>1601</td>
</tr>
<tr>
<td>2020-21</td>
<td>2801</td>
<td>1538</td>
</tr>
<tr>
<td>2021-22</td>
<td>3339</td>
<td>1818</td>
</tr>
<tr>
<td>2022-23</td>
<td>3844</td>
<td>2068</td>
</tr>
</tbody>
</table>

Source: Ministry of Statistics and Program Implementation, Govt of India

#### Contribution of Telangana’s GSDP to India’s GDP at Current Prices (2014-15 to 2022-23)

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<tbody>
<tr>
<td>TRE</td>
<td>4.1%</td>
<td>4.2%</td>
<td>4.3%</td>
<td>4.4%</td>
<td>4.5%</td>
<td>4.7%</td>
<td>4.9%</td>
<td>4.9%</td>
<td>4.9%</td>
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<tr>
<td>SRE</td>
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<tr>
<td>PAE / FAE</td>
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</tr>
</tbody>
</table>

Source: Ministry of Statistics and Program Implementation, Govt of India
PM MITRA – Telangana - Kakatiya Mega Textile Park

- Identified based on feasibility for large scale industrial development, availability of factor conditions and connectivity with rest of the country.

- Developed by Telangana State Industrial Infrastructure Corporation (TSIIC) in 486+ Ha

- KMTP has obtained “Environmental Clearance (EC)” for development of Integrated Textiles Park including establishment of 10 MLD CETP ZLD facility

- KMTP has been approved as one among the seven PM MITRA Parks in the country
Kakatiya Mega Textile Park - Connectivity

**Road connectivity - Highways**

- Close proximity to **two National Highways (NH 163 and NH 563)** at distance of 17 km and 20 km
- Accessible by Warangal **Outer Ring Road (ORR)** – under construction

**Rail connectivity**

- Warangal Railway Station – 14 km
- Kazipet Railway Station – 26 km

**Air connectivity**

- Rajiv Gandhi International Airport – 190 km
Kakatiya Mega Textile Park – Site Plan
Kakatiya Mega Textile Park – Available Area

- Allotted
- Available for MSME (0.2 to 2 ha plot sizes)
- Available for allotment to large units
INFRASTRUCTURE AND OPERATIONAL UNITS AT KMTP
## Kakatiya Mega Textile Park – Labour Availability

### Radial Population Distribution from KMTP (18-40 age cohort)

<table>
<thead>
<tr>
<th>Distance (km)</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-5 km</td>
<td>7674</td>
</tr>
<tr>
<td>6-10 km</td>
<td>8244</td>
</tr>
<tr>
<td>11-15 km</td>
<td>102587</td>
</tr>
<tr>
<td>16-20 km</td>
<td>46659</td>
</tr>
<tr>
<td>21-25 km</td>
<td>137694</td>
</tr>
<tr>
<td>26-30 km</td>
<td>143525</td>
</tr>
<tr>
<td>31-35 km</td>
<td>29276</td>
</tr>
<tr>
<td>36-40 km</td>
<td>10868</td>
</tr>
<tr>
<td>46-50 km</td>
<td>1825</td>
</tr>
<tr>
<td>51-50 km</td>
<td></td>
</tr>
</tbody>
</table>

### Total Population (18-40)

- **0-50 km: 488,352**
  - Age 18 – 30: 264,527
  - Age 30 - 35: 101,741
  - Age 35 - 40: 122,084

- **0-30 km: 446,383**
  - Age 18 – 30: 241,793
  - Age 30 - 35: 92,998
  - Age 35 - 40: 111,592

- **0-20 km: 165,164**
  - Age 18 – 30: 89,463
  - Age 30 - 35: 34,411
  - Age 35 - 40: 41,290
Anchor Investor – KITEX Group

ABOUT THE ORGANISATION

Largest private sector employer in Kerala. Manufactures body suits, sleepwear, union suit, bibs, rompers, burps, training pants etc.

2nd Largest Exporter of Infantwear globally

Employment over 11,000 Persons

Annual Turnover of INR 1600+ Cr ($200 Mn)

INVESTMENT IN KMTP

Integrated Fibre to Apparel Cluster including Spinning, Knitting, Processing and Apparel Manufacturing consuming 3.3% of Telangana Cotton

80 hectares

6-7 factories from Spinning to Garment

USD $300 Mn of Investment

11,000 Direct Employment
KITEX GARMENTS LIMITED
UNDER CONSTRUCTION
Leveraging KMTP – Hub & Spoke Strategy

Major Areas of Intervention at Hub & Spokes

- Development of Plug & Play Infrastructure for apparel and weaving units by private developers
- Development of Worker Housing near the apparel / weaving parks by private developers

Expected Investment and Output (USD MIL)

<table>
<thead>
<tr>
<th>S No</th>
<th>Park</th>
<th>Investment</th>
<th>Annual Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>KMTP</td>
<td>1220</td>
<td>2430</td>
</tr>
<tr>
<td>2</td>
<td>Sircilla - Apparel</td>
<td>80</td>
<td>150</td>
</tr>
<tr>
<td>3</td>
<td>Sircilla - Weaving</td>
<td>110</td>
<td>220</td>
</tr>
<tr>
<td>4</td>
<td>Kallem</td>
<td>110</td>
<td>220</td>
</tr>
<tr>
<td>5</td>
<td>Madikonda</td>
<td>80</td>
<td>150</td>
</tr>
<tr>
<td>6</td>
<td>Kodakandla</td>
<td>70</td>
<td>130</td>
</tr>
<tr>
<td>7</td>
<td>Mandapally</td>
<td>70</td>
<td>130</td>
</tr>
<tr>
<td></td>
<td>TOTAL</td>
<td>1700</td>
<td>3400</td>
</tr>
</tbody>
</table>
TELANGANA COTTON
HIGH QUALITY LONG STAPLE FIBRE
Telangana Cotton

- 3rd largest cotton producing state in India
- 24% of the cultivated area under cotton production
- 30-31 mm long staple fibre with high strength and maturity value

### Quality Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Telangana Cotton</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.5% staple length</td>
<td>mm 30.01</td>
</tr>
<tr>
<td>Uniformity ratio</td>
<td>% 46.54</td>
</tr>
<tr>
<td>Strength</td>
<td>G-tex 23.01</td>
</tr>
<tr>
<td>Elongation</td>
<td>% 5.54</td>
</tr>
<tr>
<td>Micronnaire</td>
<td>4.04</td>
</tr>
</tbody>
</table>

### Annual Cotton Production (Mil kg)

<table>
<thead>
<tr>
<th>Year</th>
<th>2016-17</th>
<th>2017-18</th>
<th>2018-19</th>
<th>2019-20</th>
<th>2020-21</th>
<th>2021-22</th>
<th>2022-23 (P)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production</td>
<td>820</td>
<td>920</td>
<td>710</td>
<td>920</td>
<td>990</td>
<td>830</td>
<td>980</td>
</tr>
</tbody>
</table>
Telangana Cotton – Initiatives under Deliberations

AWARENESS
Design education material and conduct interaction with farmers / FPOs. Awareness about value of contamination free cotton

BRANDING
Identify USP of Telangana Cotton. Creation of brand identity around “Clean Cotton”

PILOT PROJECTS
Pilot projects in limited districts to gain hands-on experience for wider implementation

RESEARCH & COLLABORATION
Research partnerships around reviving soils, seed development and sustainable cotton farming with global institutions

MECHANIZATION
Contamination free packaging, contamination control machines at ginning stage, Mechanized pluckers during harvesting

TAXATION & SUBSIDIES
Reviewing state level taxes which drive cotton trade to other states. Potential subsidies around contamination control machines, other advancements

HIGH DENSITY FARMING
Accelerate initiatives around seed development and high-density plantation to increase yield / reduce input intensity

ADVISORY BODIES
Telangana Clean Cotton Advisory Council with stakeholders who meaningfully contribute to the initiative

SCALE UP MODELS
Replication and scaling up of successful models. Utilize farmer collectives to scale initiatives
THANK YOU

Mr. Jayesh Ranjan, IAS
Principal Secretary to Govt. of Telangana, Industries & Commerce, & ITE&C Department
secy_itc@telangana.gov.in

Mr. Mihir Parekh
Director - Textiles,
Industries & Commerce Department
dir-megatex-iic@telangana.gov.in

We welcome you to be a part of Telangana’s growth story.