

GMMSA EXPO 2017 BEGINS

First Exhibition to finally take place in Demonetization hit Ludhiana Hosiery Industry - Fingers Crossed

Lack lustre Ludhiana hosiery industry very severely hit by the note ban announcement of prime minister Narinder Modi on November 8, 2016 has finally been able to stage a mega machinery show, after the postponement of its two major shows. President of Garment Machinery Manufacturers & Suppliers Association (GMMSA), the organizers of this show, Narinder Kumar says, "We need to move ahead come what may - we are entrepreneurs always trying to find the best way out of every hazard, industry has started showing the signs of reversal and soon we will come out better. Success of this show will provide ray of hope to the industry and will act as a big morale booster."



2nd edition of GMMSA EXPO INDIA, the Garments Machinery Manufacturers & Suppliers Association (GMMSA) (Regd.) opened their doors to visitors on 17th February,

Friday, at Dana Mandi, Bahadurke Road in Ludhiana.

The Expo was inaugurated with lamp lighting ceremony by Ravi Bhagat, I A S, Deputy Commissioner, Ram Krishan - Chairman GMMSA, Narinder Kumar President, Gurpreet Singh, Amit Jain, Parmesh Wasist, Gurdev Singh, Jatinder Sudera, Sukhwinder Singh, Pankaj Kalra, and other industry delegates.

The exhibition is a platform for the garment machinery manufacturers and suppliers to display their products and facilitate relations between manufacturers and buyers. The first day of the exhibition saw a foot fall of more than 7000 where manufacturers demonstrated the latest technology.

Speaking on the occasion, Mr. Ram Krishan - Chairman, GMMSA Expo India 2017 said that, "The response that we have got

for the exhibition has been very encouraging. This helps us to make every effort bigger and better."

He added, "The objective of this Expo is to capitalize the opportunity to provide latest technology and know-how at the doorsteps of the industry,"

Mr. Narinder Kumar of Narinder International and President GMMSA Expo India 2017 said, "Our aim is to bring the best to the industry in latest technology. We have brought special machines like the three technical way Jacquard Machines where more complex patterns can be made. The most significant technology that is on display at the exhibition could be the Double System machine in which the gauge of bed can be changed according to need. The entire bed can be changed from 7 gauge to 14 gauge and we have an exclusive patent to this technology. We also have some very high speed interlock machines that save on time and money."

Mr. Amit Jain of Nav Pankaj Creations said, "We have thick thread, multi-head and chinnile machines."

The well organized stalls were a treat for those who visited. The display of value added features enhancing productivity as well as quality of the end product significantly reeled in many enquiries. Top notch brass of the industry from knitting houses, dyeing, finishing, processing houses marked their presence with their production and quality control teams.

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GarFab-TX Surat : 14th Edition
Venue : SIECC, Surat - India

Date: 7-9, April 2017
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CITY VIBES that has so far covered many national exhibitions through out the lengths

and breadth of the nation, plans to cover some foreign exhibitions as well in 2017. We welcome entries from different organizers of exhibitions to send us details of their events for publishing in this column Free of Cost. City Vibes can publish special edition on your events which can be read online at www.cityvibesglobal.com.

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'Make in India' needs better approach - Udeshi (Reliance)

A lot of thrust has been given to Government's 'Make in India' initiative, said RD Udeshi, President - Polyester Chain, Reliance Industries Limited, in keynote address. This was the theme of international textile conference, held by the Textile Association (India), Mumbai Unit on December 1-2, 2016 at Hotel The Lalit, Mumbai.

"India has enough natural resources, labour and skill. We are No. 1. in cotton. Then why are we lagging still behind? This is the biggest question," tells Udeshi. He adds, "Foreign countries have started looking at India very seriously."

"The Indian textile industry is around \$110 billion. It's very small compared to China. Indian textile industry has been growing at a rate of 15 per cent annually. India is the second largest textile manufacturer and exporter. China is first with the market share of 40 per cent. The Government has given kept target to reach around \$600 billion by 2025. Of this, textile exports are around \$350 billion and total textile consumption is around

\$250 billion," he adds. Udeshi says, "We are seeing little vibration in the economy and people have started thinking what next to do? This is a very ambitious target. We need to work on the right direction to reach this target. Countries like Bangladesh, Vietnam and Cambodia are becoming a manufacturing hub. They have certain advantage because of most favoured tag given by various countries."

"India is changing a lot. Earlier people used to wear one single dress in the entire day. But now, the time is chang-

ing. People are very three to four different types of clothes in a day like morning wear, office wear, evening wear, night wear, etc. The younger generation is making this change happen. There is a definite change in buying pattern. The demand will increase in future," says Udeshi.

Udeshi highlighted the comparative advantages and competitive strengths of India as fast emerging economy. He pointed out fibre base, modern technologies under the TUFs scheme and thrust on technical textiles. He

remarked that the industries should avail of the opportunities to the best advantages to excel in the international competitive environment.

Chief Guest Ujjwal Narayan Uke, Principal Secretary (Textile), Co-operation, Marketing & Textile Department, Government of India, gave a motivational speech on Make in India and how India should adopt this initiative. Uke emphasised that industry and government should work hand in hand to achieve the super ordinate goals of the "Make in India". He

emphasised on positive vision by both industries and individual for the future growth of the country.

"Make in India" campaign aims to facilitate investment, foster innovation, enhance skill development, protect intellectual property, and build best-in-class manufacturing infrastructure in India. The textile sector is one of major thrust areas planned in this mission providing growth drivers, FDI, and employment opportunities.




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Innovation in manufacturing: First 'Speed Factory' opens in Germany

Innovation in manufacturing: first 'speed factory' opens in Germany
Sporting giant Adidas has launched a new concept that looks at individualisation rather than standardisation. Regina Henkel analyses the idea that aims to revolutionise production in the coming years.

Adidas has announced the establishment of its first 'Speed Factory'. The purpose: Adidas intends to revolutionise production in the coming years, and be even closer to customer's needs at the same time. It was not until this summer that Adidas announced the plan to develop Speed Factories to take shoe production to a new level. Only a few months later, the first plant was built. It was erected at the Oechsler AG in Ansbach, Germany, not far away from the Adidas headquarters in Herzogenaurach. It is expected to produce 500 pairs of running shoes in the next few

months. Commercial mass production should start in the near future, the company said.

Flexible, highly automated, decentralised production

The highly innovative concept of the Speed Factory is based on the idea of Industry 4.0, which many experts consider to be the production method of the future. The aim is to combine the latest digital technology with the automation possibilities of big data and new production methods. Until now, the manufacture of shoes and clothing was a hand labour-intensive industry; that's why it has been outsourced to low-wage countries. Only with the new possibilities of a highly efficient and automated production, that production sites in Germany and elsewhere in Europe are conceivable again. So, instead of continuing to outsource production to low-wage countries and accept the expensive

transportation to consumers, Adidas wants to work in the future with smaller, decentralised and highly automated production facilities right where the consumer is located. The goal is a whole network of new sites that use intelligent robot technology will exchange data with each other.

In addition, Adidas will gain much more flexibility to better meet regional needs and be able to respond even to individual customer requirements. "Individualisation rather than standardisation" is the idea of Adidas. The consumer has to become part of the brand and can interact directly with in-store customisation, co-creation and interactive brand experiences.

"Speed Factory combines the design and development of sporting goods with an automated, decentralised and flexible manufacturing process," said Herbert Hainer, CEO of Adidas Group. "This flex-

ibility opens doors for us to be much closer to the market and to where our consumer is. Ultimately, we are at the forefront of innovating our industry by expanding the boundaries for how, where and when we can manufacture our industry-leading products."

But the project, which has been supported by many other companies and institutions and with funding by the German Government, wants still more. When the first pilot plant succeeds, the new concept may solve several problems of the global apparel industry. It is not just about creating new jobs in a production branch, which seemed to be lost forever in countries like Germany. It is also about improving environmental performance by avoiding transport routes. In addition, the production would improve its transparency and control in the global value chain leading to control over product piracy.

Making of Textile and Apparel Machinery - Will The Whirr Get Louder?

The Indian textile and apparel industry needs to gear up to take maximum advantage of the present scenario. Manufacturing machinery is an essential part of this preparedness. The industry will need to invest US\$75 billion by 2020 only in machinery to meet domestic demand and to increase its export basket size, says Associate Director, Wazir Advisors, ARINDAM SAHA. Historically, indigenous machinery has always played an important role in the growth of the textile and apparel industry. A look at the history of the textile industry in Europe, China or even the spinning industry in India reveals this trend. If India is to bring to reality the 'Make In India' dream, history will need to repeat itself for the entire textile value chain. By 2020, the Indian textile and apparel industry is estimated to invest US\$ 75 billion only in machinery since importing machinery will not make much practical sense.

The Indian textile and apparel industry is again at an inflection point. With 5.2 per cent share of global trade in 2013, this industry ranks second in the world, but is far behind torchbearer China. The good news is that China's share in global textile trade is estimated to go down as it has started losing its competitive edge in terms of costs, domestic demand is growing exponentially, and China is focusing on industries with higher margins.

Chinese textile players are investing outside their country, including in India. The recent joint venture of Shandong Ruyi with Reliance is one such example. India is in the best position to capture the major share of the trade vacuum which will be created by China and can increase its export to US\$ 89 billion by 2020. In

the last five years, the domestic apparel market has been growing at 11 per cent CAGR. It is expected to keep its momentum for the next decade. It has been estimated that the domestic market will be worth US\$ 154 billion by 2020. So, the Indian textile and apparel industry may grow to US\$ 243 billion by 2020 from the present US\$ 108 billion, a jump of almost 150 per cent.

The entire environment of the Indian textile and apparel industry needs to gear up to take maximum advantage of the present scenario. Manufacturing machinery is an essential part of this preparedness. It has been estimated that the Indian textile and apparel industry will need to invest US\$ 75 billion by 2020 only in machinery to meet domestic demand and to increase its export basket size to US\$ 89 billion. To this end, US\$ 50 billion will need to be invested towards capacity building. An additional US\$ 25 billion will be required for the replacement of old machinery.

Approximately 30 per cent of our machinery is now imported from China. But since 2010, the Indian currency has depreciated significantly with respect to the US dollar while the yuan has appreciated. This double impact has made Chinese machinery costlier to import. Importing machinery does not really make sense in the long term. This trend is expected to continue. Like textile and apparel, machinery manufacturing is also becoming costlier in China as wages are increasing sharply compared to many other developing countries, including India. Demographic shifts in China will limit the labour force in coming years which will further push up wage rates. In contrast, India

has very favourable demographics with half of the population less than 25 years of age. With the present focus of the Union government on skill development, availability of skilled manpower in the productive age group of 20-60 years should not be a challenge in coming years. Manufacturing our own machinery is also one of the major focuses of the present government. In the last Union Budget, an allowance of 15 per cent was declared for the investment of more than '25 crore in new plant and machinery for manufacturing capital goods.

The expert committee also suggested several measures in favour of indigenous textile and apparel machinery in their draft document, 'Vision, Strategy and Action Plan' - treated as a base document for the upcoming textile policy. When all these developments are considered, investment in textile and apparel machinery manufacturing in India makes lot of sense.

Global leaders of textile and apparel machinery have not invested significantly yet in India except in the spinning sector. They have been inhibited by a smaller market. The textile product basket of India is very diverse so we require different technologies. Even domestic and export market suppliers use different technology. Many small and medium entrepreneurs prefer to use second hand machinery. So, the market of a typical machine gets divided into many segments and thus falls below the minimum economic size. But this scenario is changing fast.

A process of consolidation has started; organised players prefer in-house capacities in comparison to outsourced facilities, and the overall market size will also increase mani-

fold. Hopefully, global players will now foresee the minimum economic market size which will help swing their investment decisions in India's favour.

India's automobile sector has seen rapid recent growth. Global leaders of that industry have not only looked at India as a great market but a potential manufacturing base for this region. Once they made their investment plan, the spare parts suppliers came in and many of the Indian players improved their product quality and capacity.

The same is waiting to happen with textile machinery manufacturing. Per spindle manufacturing cost of ring-frame is one of the lowest in India. Manufacturers of other machineries are also exporting to the Indian subcontinent and Africa. Global leaders of textile machinery industry are taking note of it and hopefully will keep this angle in mind while taking investment calls. Once they make up their mind to invest in India, further research on location, capacity, technology, business models, etc. will be required.

It will be interesting to observe the first movers. We might witness significant investment by some of the loom and knitting machine manufacturers very soon.

The 'Make In India' dream looks promising but needs hard work.

Digital Textiles Printing on Growth path

Digital textiles printing is the latest and fast growing printing technology in the textiles industry. Since its beginning in 1990's and commercialization in early 2000's, DTP has evolved at a great pace. This technology when introduced in early 2000's was primarily used for sampling and soft signage application due to its limitations, however as the technology evolved and advanced it has been widely accepted by textiles printers across the world and is being used for wide range of applications.

Global DTP market by ink type can be segmented into four major ink type namely Acid ink, Disperse & Sublimation ink, Pigment ink and Reactive ink. DTP is primarily used for printing applications in the textiles industry, this report is segmented into

four major applications of the DTP namely Textiles & Clothing applications, Home textiles applications, Soft signage applications and others.

Digitally printed textiles output is expected to increase at a CAGR of 28.1%, in terms of volume between 2015 and 2020. Demand for DTP is

expected to be driven by following major drivers. It significantly reduced response time by eliminating several time consuming processes. Better flexibility and high creativity Cost advantage in short run cycles More eco-friendly process than traditionally used analog printing methods.

Key players in the DTP market are Mimaki Engineering Company Ltd. (Japan), Seiko Epson Corporation (Japan), Kornit Digital (Israel), Sensient Technologies Corporation (U.S.), EFI Inc. (U.S.), Dystar Group (Singapore) and APSOM Technologies (India)





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Global Home Textiles Outlook 2020

Home textiles segment has become one of the most attractive segment in the textiles industry in the recent past and has emerged as one of the most fashion sensitive segment in the textiles indus-

try. After witnessing sluggish growth phase during financial crisis of 2008, home textiles segment has shown signs of recovery and registered considerable growth in past few years. Retail value of

home textiles segment is estimated to be around \$ 107,236.7 million in 2014 and is expected to reach \$131,499.9 million by 2020 growing at a CAGR of 3.5% during the period of study.



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Payment banks to Revolutionise Industry

With the Reserve Bank of India (RBI) issuing approval to 11 entities to open payments banks in the country, it is expected that the move will widen the reach of banking services in the country and revolutionise the Indian banking industry. The payment banks are permitted to do limited banking services - for instance, they can accept deposits, issue debit cards and offer payments and remittance ser-

vices, but can't lend. It is expected that the payment banks will target financially excluded customers like migrant workers, low-income households and small businesses, thus supporting the financial inclusion drive of the Government of India from Pradhan Mantri Jan-Dhan Yojana (PMJDY).

Like Aditya Birla Nuvo Ltd, Airtel M Commerce Ser-

vices Ltd, Cholamandalam Distribution Services Ltd, Department of Posts, FINO PayTech Ltd, National Securities Depository Ltd (NSDL), Reliance Industries Ltd (RIL), Tech Mahindra Ltd, Vodafone m-pesa Ltd, Dilip Shanghvi, founder of Sun Pharmaceutical Industries Ltd and Vijay Shekhar Sharma, CEO of One97 Communications that runs Paytm have received the in-principle approval from RBI.

According to a recent IDC report, worldwide mobile payments will account for US\$ 1 trillion in value in 2017, registering an increase of 124% from the less than US\$ 500 billion expected in 2015. Reportedly, mobile wallets have already surpassed credit cards in terms of the number of users in India. In fact, according to The World Bank, RBI's move is

expected to expand penetration of the banking sector in rural areas of the country. At the same time, the entry of new players is likely to increase competition in the Indian banking industry, lower remittance costs and extend the formal market for remittances, thus pushing the sector towards the next phase of growth. India is already the world's largest for global remittances and payment banks are expected to push the envelope even further. However, the success of these banks will depend on low-cost technology and high volume of transactions so that charges are reasonable and profitable at the same time. Overall, the payments banks are expected to bring in additional funds into the Indian banking circuit and being a support system to the big banks in extending their rural reach.

Apparel Industry in India: Current Scenario and Snapshot to 2020

This study focuses on the Indian apparel market, researching key driving factors for the growth of the country's domestic apparel industry. The report further segments the market size based on user category, use and price. Key Indian players and the entry of international brands into the Indian market are also briefly discussed in this report, as well as the impact of online sales.

India is among the most attractive investment propositions for the global retailers. The retail sector in India accounts for nearly 22 per cent of the country's gross domestic product (GDP) and contrib-

utes to almost 8 per cent of the total employment. The domestic apparel market is US\$ 50 billion as of 2013 and is expected to grow at a compound average growth rate (CAGR) of 13 per cent over the next seven years. Currently, apparel industry contributes 15 per cent to the industrial production, 4 per cent to the GDP, and 17 per cent to the country's export earnings. Over 30 million people are directly employed in the apparel industry. The recent exclu-

sion of excise duty on branded apparel has provided an incentive to retailers in terms of the market sentiment. With a market size of US\$ 20 billion in 2013 and accounting for 40 per cent of the overall market, men's wear is the largest segment in the Indian apparel market. In comparison, women's wear makes 35 per cent, while the kid's wear comprises only 25 per cent of the market. However by

2020, women's wear would be contributing more than men's wear. In terms of usage, casual wear leads the purchases, accounting for almost half of the total apparel sales. The key players in the Indian market -- Madura Garments, Raymond and Arvind -- are facing increasing competition from entry of international brands. Online sales are at a nascent stage, however growing at a rapid pace

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Rajiv Garg to head NITMA

Rajiv Garg, MD of Garg Acrylics Limited has been elected as President of Northern India Textile Mills' Association (NITMA), the apex body of textile industry in North India. NITMA elected its new leadership team in its executive committee meeting held very recently at Ludhiana. Manish Bagrodia, MD, Winsome Yarns Ltd. was elected as Senior Vice President and Mukesh Tyagi, Director, BST Textile Mills Pvt Ltd., was elected as Vice President. Sanjay K Jain the outgoing President welcomed & congratulated the new team. NITMA was established in 1958 and has been

since continuously serving the best interest of textile units in Northern India and has been instrumental in creating a linkage between the industry and Government. Its members collectively have a turnover upward of Rs 50,000 crore (approx. \$8 billion). Speaking on the occasion Garg said that the industry is confronted with an uphill task of overcoming hurdles in domestic as well as international



markets in post demonetisation scenario. He also advocated adopting scientific approach for estimating cotton crop size and cotton arrivals by various agencies.

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Vietnam: The emerging giant in textiles & clothing

Although Vietnam-the world's fourth largest textile and apparel exporter - has huge potential for cotton cultivation and production, the local sources supply less than 2 per cent of the total requirements and the industry imports huge quantities from outside. The country's Vietnam National Textile and Garment Group (Vinatex) now plans to invest \$441.3 million in 59 textile, dyeing, garment and infrastructure projects over the next two years alone. Government policies are favourable to industry and entry barriers are not high. Vietnam's textile and apparel industry is now looking forward to another boom, and presents an opportunity for others to cash in on its growth plans. Vietnam National Textile and Garment Group

(Vinatex), the apex body of the textiles industry in that country, has declared that Vietnam has become the world's fourth largest textile exporter. In the first half of this year, the country earned an estimated \$12.18 billion from textile and clothing products - a year-on-year (YOY) increase of 10.26 per cent. The industry is well on track to meet its 2015 export target of \$27- 27.5 billion. The three largest importers of Vietnamese products are United States - with a YOY growth rate of 11.01 per cent, South Korea - with a YOY growth rate of 8.33%, and the European Union - with a YOY growth rate of 8.2 per cent. Vietnam's garment and textile industry consists of three sub-sectors: up-stream sector (fibre pro-

duction), mid-stream sector (fabric production and dyeing) and down-stream sector (garment manufacturing). In the Initial years, the sub-sectors that produced fibres or fabric were not up to the mark in quality and were mainly used for domestic consumption.

Although Vietnam has huge potential for cotton cultivation and production, the local sources supply less than 2 per cent of the total cotton requirements and the textile industry imports huge cotton quantities. The local fabric industry supplies about 20% of the total input demand by the garment sector.

Hong Kong: Ideal trading hub for India

Johnny Wan, Director of Exhibitions Market Development, Hong Kong Trade Development Council (HKTDC), highlighted opportunities for Indian companies at the HKTDC's world-class trade fairs during a press briefing in New Delhi recently.

Wan underscored the robust bilateral trade relations between Hong Kong and India, adding that the Council's trade fairs offered a good platform to boost business.

"India and Hong Kong have enjoyed close

business relationship over the years. While Hong Kong is well-positioned to help enhance India's external trade in global markets, the HKTDC plays an important role in boosting trade and strengthening bilateral

links between India and Hong Kong," said Wan. India is Hong Kong's seventh largest trading partner. In 2016, the value of bilateral trade reached around \$26.9 billion, an impressive increase of 13 per cent over 2015.

The trade relationship is particularly strong in pearls, precious and semi-precious stones, telecommunications equipment and parts, as well as finished jewellery. In Hong Kong, the

HKTDC organises more than 30 fairs annually, forming 11 largest marketplaces of their kind in Asia, with jewellery, gifts, watches and clocks, electronics and lighting being the largest of their kind in the world.

Ethiopia & Kenya hold vast scope for MMF textiles

Come March, the Synthetic Textile Export Promotion Council (SRTEPC) will be participating in exclusive Indian Textile Exhibitions (INTEXPO) in Ethiopia (March 6th & 7th, 2017) and Kenya (March 9th and 10th, 2017). SRTEPC is inviting its members to participate in these exhibitions since it sees a lot of scope for man-made textiles in these two African nations. The incentives for member participation include early bird discounts and Marketing Development Assistance, says SRTEPC. *Highlights of the Ethiopian textile market:* Imports of textile & clothing by Ethiopia from the world were US\$ 1145 million during 2015. India's share in total imports of is nearly 0%, worth \$112 million in 2015. In this textile imports from world account for 47%

(\$534.51 million), clothing imports for 41% (\$468.81 million) and made-ups for 12% (\$142 million). Ethiopia's total imports of MMF textiles from the world during 2015 stood at \$458.84 million, of which India's share was only \$74.32 million (16%).

Highlights of the Kenyan textile market: Imports of textile & clothing by Kenya from the world were \$2013.13 million during 2015, of which India's share is nearly 5%. Textile imports of Kenya from the world account for nearly 42% (\$849.65 million), clothing imports for nearly 25% (\$498.99 million) and made-ups for 15 per cent (\$297.72 million). Kenya's total imports of MMF textiles from the world during 2015 stood at \$335.69 million, of which India's share was only \$55.01 million (16%).

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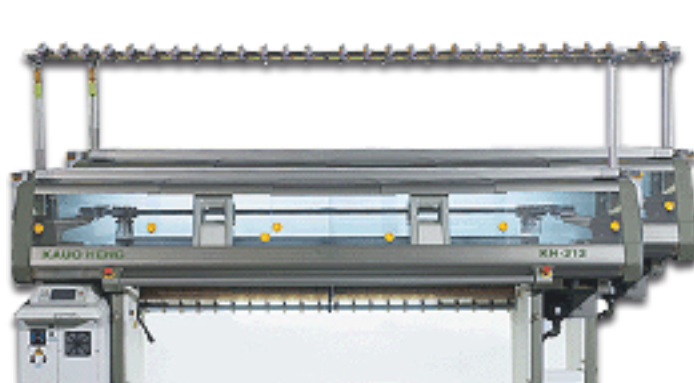
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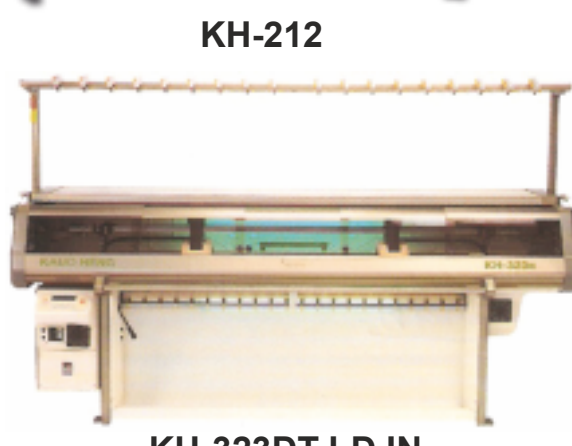
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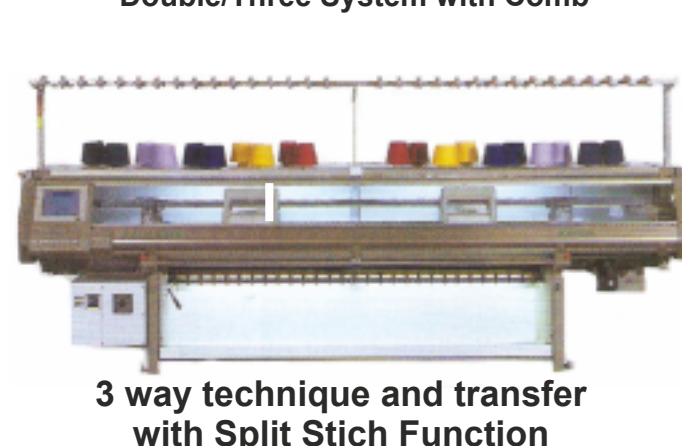
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Government e-Marketplace: A GeM for modern procurement

The Government of India has laid special emphasis on the reforms required in its public procurement process. In a major step that aims to transform the way in which procurement of goods and services is done by Ministries/ Departments, PSUs and autonomous bodies etc, the government has recently announced the launch of Government e-Market place (GeM). The idea of GeM was mooted in recommendations of two Groups of Secretaries made to the Hon'ble Prime Minister in January 2016. The recommendations included setting up of a dedicated e-market for different goods & services procured/sold by Government/PSUs. Subsequently, the Hon'ble Finance Minister in his Budget speech for FY 2016-17,

announced setting up of a technology driven platform to facilitate procurement of goods and services by various Ministries and agencies of the Government. The Government e-Marketplace (www.gem.gov.in) was formally launched in August 2016 by the Hon'ble Commerce & Industry Minister. Transactions for more than INR 140 crore (US\$ 20.5 million) have been processed through GeM since its launch (Source: PIB release id 157610 dated January 23, 2017). The platform today boasts of over 7400 products in about 150 categories. Being a completely paperless, cashless and system driven e-market place that enables procurement of common use goods and services with minimal human

interface, GeM offers clear advantages like transparency, efficiency and security. GeM also has the potential to support key government initiatives like Make in India and Digital India. Needless to mention, GeM is expected to result in huge savings for the government. GeM is also doing demand aggregation for items that are to be procured by various Central/State Government Departments which, according to reports, is expected to result in annual savings to the tune of INR 40,000 crore (US\$ 5.87 billion) per annum. GeM has an opportunity to emerge as the single platform for India's National Public Procurement Program and result in massive annual savings in public procurement.

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