



UP GLOBAL
INVESTORS SUMMIT
10-12 FEBRUARY, 2023 | LUCKNOW
New India's Growth Engine

UTTAR PRADESH TEXTILE SECTOR



GLOBAL SCENARIO

- The global apparel market is expected to reach USD 2.0 trillion by 2025 from USD 1.5 trillion in 2021 growing at a CAGR of 4.0% primarily due to increase in demand for clothing across the world¹.
- Region-wise, the United States and European Union (EU-27) are the leading markets contributing 17.5%, and 14.4% respectively in 2021. These regions are followed by China, Japan and India with a market share of 12.8%, 5.3% and 4.9%, respectively².
- Moderate growth in recent years has increased industry competitiveness. With fast-changing consumer preferences, players are required to create strong brand consciousness and run intensive marketing campaigns to retain market shares.
- India enjoys a comparative advantage in terms of skilled manpower and cost of production relative to other major textile producers.

INDIA SCENARIO

- India is the second largest textile and garment producer in the world. Production of fiber in India reached 2.40MT in FY21 (till January 2021)³.
- India has the second largest textile manufacturing capacity globally, accounting for 18% of the world's spindles and 9% of the world's rotors and has a share of 4% - 5% in the global textiles and apparel trade.
- India is responsible for more than 6.9% of the world's total textile production and its textile industry valued at approximately USD 150 billion⁴.
- The country is the largest cotton and jute producer and the second largest producer of silk. 95% of the world's hand-woven fabric comes from India⁵.
- India is the 6th largest exporter of textiles and apparel in the world. Exports of textiles and apparel are expected to reach USD100 billion in the next five years, growing at a CAGR of 11% (as on July 18, 2022). To double the Indian textile and apparel industry size to USD190 billion by 2025-26, the set-up of seven mega textile and apparel parks has been planned.



¹Indian Textile and Apparel Industry 2022 (Annual Report) Wazir Advisors

²Same as above

³IBEF Presentation, Textile Industry in India, Leading Yarn Manufacturers in India - IBEF

⁴Mordor Intelligence, Grand View Research

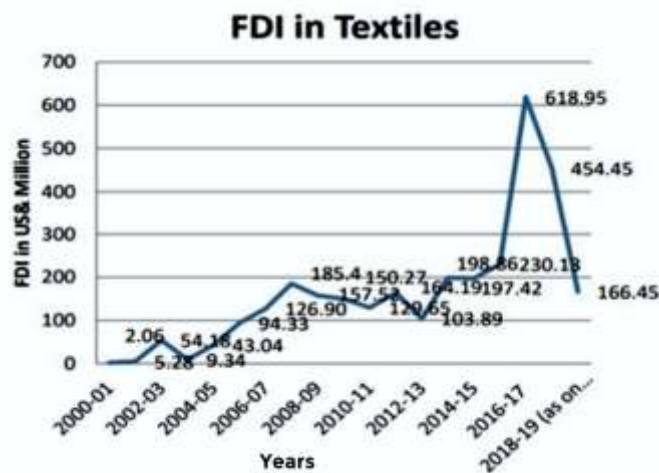
⁵Textile Industry in India - Garment & Apparels Market in India (investindia.gov.in)

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- India's textile and apparel industry stood at USD150.5 billion in 2019-20. The share of textile,



Source : IBEF



Source: <http://texmin.nic.in/sites/default/files/8.%20FDI%20Textiles.pdf>

⁶ Same as above

⁷ Same as above

⁸ <https://www.makeinindia.com/sector/textiles-and-garments>

⁹ <https://www.investindia.gov.in/sector/textiles-apparel>; Textile (India) - Industry Overview | Discover (ey.net)

MAJOR GOVERNMENT OF INDIA INITIATIVES

1) Product Linked Incentive Scheme

- In September 2021, the government has approved the Production Linked Incentive (PLI) scheme for promotion of MMF Apparels, MMF Fabrics and products of Technical Textiles produced in the country, with a budgetary outlay of INR 10,683 crores (USD 1.31 billion)¹⁰, over a period of 5 years.
- The scheme aims to enhance India's manufacturing capabilities of Man-Made Fiber (MMF) apparel, MMF Fabrics and technical textiles industry by providing incentives from 7%-15% on stipulated incremental turnover for five years¹¹.
- The government has received total investment proposals from 64 applicants to the tune of INR 19,789 crore (USD 2.43 billion) and projected turnover of INR 193,926 crore (USD 23.84 billion) with a proposed employment of 245,362¹².

2) PM Mega Integrated Textile Regions and Apparel Parks (PM MITRA) Scheme

- In October 2021, the government approved the PM MITRA Parks Scheme to set up 7 (Seven) Integrated Textile and Apparel Parks in Greenfield/Brownfield sites to create modern, integrated large scale, world class industrial infrastructure including plug and play facilities with a budgetary outlay of INR 4445 crore (USD 0.55 billion) over a period of 5 years.
- The government has made provision for Development Capital Support to develop internal infrastructure such as internal roads, water supply, effluent treatment plant etc. at the rate of 30% of the project cost with a maximum support of INR 500 Crore (USD 61.46 million) and INR 200 Crore (USD 24.59 million) per park for Greenfield and Brownfield projects.
- The government has made provision of INR 300 Crore (USD 36.88 million) per Park for Competitive Incentive Support to the manufacturing unit set-up in the PM MITRA Park.

3) FDI - The Government of India has allowed 100% FDI in the Indian textile manufacturing sector through the automatic route.



USD = INR 81.35

¹⁰Ministry of Textiles, Government of India

¹¹Same as above

¹²Same as above

UTTAR PRADESH SCENARIO

- Textile sector is one of the important traditional industries in the state. Uttar Pradesh is the third highest fabric-producing State in India producing 13.24% of the national production¹³.
- Uttar Pradesh has about 1,99,000 handloom weavers and about 5,00,000 power loom weavers, with natural clusters developed over hundreds of years. The Silk sarees from Varanasi and Mau, Chikankari from Lucknow, Zari-zardozi from Lucknow, Bareilly and Shahjahanpur, Carpets from Bhadohi, Mirzapur and Sonbhadra and Durries from Sitapur are the strength and pride of the entire country. Most of our handloom products carry the GI (Geographical Indicator) tag.
- Export of textile and apparel from Uttar Pradesh was valued at around INR 20,000 Cr (USD 2.46 billion) in 2021-22¹⁴. (including carpets and other textile floor coverings).
- Uttar Pradesh is the largest market for textile and apparel, with a consumer base of 240 million people.
- Gautam Budh Nagar and Kanpur districts are among the India's largest ready-made garment and hosiery clusters.

KEY INVESTMENT ENABLERS

1) Major Production Centres in Uttar Pradesh with unique textile products

Centers	Products
Amroha	Picnic Mats
Azamgarh	Silk Sarees, mixed sarees and fabrics, Kharri Mats
Agra	Mats, bedsheets, furnishings, heavy dress materials, chenille cotton carpets.
Baghpat	Bedsheets, Bed Covers
Barabanki	Stoles, scarves, lungis.
Etawah	Bedsheets, dress materials, Mats, mixed fabrics
Farrukhabad	Cotton prints, bedsheets, dress materials, Mats, chenille cotton carpets, mixed fabrics
Fatehpur-Sikri	Heavy cotton fabrics, dress materials, Mats, chenille cotton carpets, mixed fabrics.
Gautam Budh Nagar	Apparels
Ghaziabad	Jacquard furnishings, bedspreads, terry towels, linen, home furnishings.
Gorakhpur	Terry towels, toweling, furnishing, dress material , Bed Sheets and Bed Covers
Hapur (Pilkhuwa)	Bed Sheets, Bed Covers and Canvas Cloths
Hathras	Chenille rugs, cotton carpets, fabrics
Kanpur	Mats, Dusters, Cotton fabrics, Canvas Cloths
Lucknow	Chikankari work
Moradabad	Bedsheets, Bed Covers
Rampur	Bedsheets, Bed Covers
Sitapur	Cotton mats
Varanasi	Silk sarees, sarees, mixed fabrics, cut work items, dress materials, furnishings, stoles, scarves, gauze and leno fabrics, brocades.

¹³https://niti.gov.in/planningcommission.gov.in/docs/plans/stateplan/upsdr/vol-2/Chap_b3.pdf

¹⁴Export Promotion Bureau, Uttar Pradesh

2) Key Handloom and Textile Clusters

Total 42 handloom clusters exist in the state. Bhadohi, Mirzapur, Varanasi, Azamgarh and Agra are the major carpet centers in the state. The most significant clusters for handloom and textile in Uttar Pradesh include: -

Carpet cluster Mirzapur – Bhadohi

- ✓ Bhadohi is known as the 'carpet city' of India. It is the largest manufacturer and exporter of hand-knotted carpets in India.
- ✓ The Mirzapur – Bhadohi region is the largest handmade carpet weaving cluster engaging around 3.2 million people in the industry.¹⁵
- ✓ The carpets of the region received the Geographical Indication (GI) tag, which means carpets manufactured in nine districts of the region, Bhadohi, Mirzapur, Varanasi, Ghazipur, Sonbhadra, Kaushambi, Allahabad, Jaunpur and Chandauli would be tagged with handmade carpet of Bhadohi.
- ✓ Well known carpet types from Bhadohi include Cotton Dhurry/Dhurries, Chhapra Mir carpets, Loribaft, Indo Gabbeh.



Silk cluster Varanasi

- ✓ Varanasi Silk Handloom Cluster is world famous, and its dominance continues in producing the best quality silk fabrics, particularly sarees.
- ✓ The market size of the silk products of Varanasi was about INR 1,300 Crore (USD 0.16 billion) in 2018-19, out of which 20% has been generated from the exports of the silk products¹⁶.
- ✓ 70% of the total domestic market of the Varanasi silk industry is in southern cities such as Hyderabad, Bangalore, Chennai, Coimbatore etc. Apart from these, Kolkata, Jaipur, Ahmedabad, Lucknow and Mumbai are the other key markets for the Varanasi Silk Products.
- ✓ Bangladesh and Nepal are key international markets for Varanasi Silk Sarees and UK, USA and UAE are other key international markets for Silk products.
- ✓ Varanasi Silk Product Market consists of 80% of Saree & Brocades, 5% of Lacha, 10% of Dress Material, 5% of Dupatta stole/scarf and 1% of other silk products¹⁷.
- ✓ Varanasi silk saree/fabric with heavy embroidery work provides several variations in designs and color making it exclusive.



¹⁵<https://bhadohi.nic.in/economy/>

¹⁶Department of MSME, Government of Uttar Pradesh

¹⁷<https://www.library.up.gov.in/assets/front/img/InvestIndiaUPODOP.pdf>

Ready-Made Garments cluster Gautam Budh Nagar

- ✓ The Ready-Made Garments (RMG) cluster is spread over Noida and Greater Noida industrial area, UPSIDA and Yamuna Expressway Authority area of Gautam Budh Nagar. The district is also known as “City of Apparels”.
- ✓ This cluster presents a diverse range of high quality ethnic and western apparels in tune with the global trends and markets. In the past two decades the cluster has emerged as a leading exporter of apparels from India. Majority of the exports from the cluster pertain to the US, UK, European Union, Canada, etc.
- ✓ Currently more than 1700 units and 1000 units are operating from Noida and Greater Noida respectively.

Hosiery and Ready-Made Garments cluster Kanpur Nagar

- ✓ Kanpur is home to one of the most thriving leather, hosiery and ready-made textile regions. The industry goes back to the British era when Kanpur was nicknamed the ‘Manchester of India,’ for its perennially running cotton mills being home to thousands of dedicated cotton mill workers. It is one of the largest hosieries producing industrial regions of India.
- ✓ The textile cluster is mainly concentrated in areas within the central part of the city and in a sub urban area called Rooma.

Availability of skilled, semi-skilled human resource

- ✓ With a total population of more than 24 Crore (240 million), Uttar Pradesh boasts a labor force of over 6.58 Crore.¹⁸ Rich in traditional arts, the state has an abundance of skilled labor readily available at competitive costs for the textile and apparel sector.
- ✓ Institutes like National Institute of Fashion Technology, Raebareli offer courses in textile design, leather design, fashion technology and management. Uttar Pradesh Textile Technology Institute offers UG and PG programs in textile technology and engineering. Indian Institute of Handloom Technology, Varanasi and Indian Institute of Carpet Technology, Bhadohi offers diploma courses in handloom technology.
- ✓ Integrated skill development scheme (ISDS)- a centrally sponsored scheme is successfully running in the State to address the skilled manpower of the textile industry. Around 1,16,677 people have been trained and 75,238 have been placed under this scheme in the State¹⁹.
- ✓ Similarly, under the SAMARTH scheme 14,156 people have been trained, 13603 assessed and 5072 placed in Uttar Pradesh²⁰.
- ✓ The state has world class institutions such as Indian Institute of Technology – Kanpur (IIT – K), Indian Institute of Technology, Banaras Hindu University (IIT BHU), Indian Institute of Management – Lucknow (IIM – L), and about 75 Universities, 4,000 colleges for training skilled workforce for industrial upgrade.

¹⁷Uttar Pradesh Population Census 2011 (<https://www.handloom.upsdc.gov.in/StaticPages/Demography.aspx>)

¹⁸<http://isds-textiles.gov.in/pub/dashboard.html#>

¹⁹https://samarth-textiles.gov.in/public_dashboard/

Government of Uttar Pradesh Support

1) State Schemes and Initiatives

- ✓ **Prime Minister Handloom Weavers Mudra Scheme-** Under this scheme, handloom weavers are availed loans at only 6% interest rate²¹.
- ✓ **Assistance to the Trainees of Handloom Sector-** Under this scheme, candidates are selected for the seats fixed by the Government of India every year for the trainees of the three-year diploma course at the Indian Institute of Handloom Technology, Varanasi. The amount of scholarship is payable by the Government of India and the State Government to the trainees of the first, second, and third based on 50:50. In the financial year 2021-22, a total budget of INR 15 lakh (USD 0.02 Million) is proposed for the scholarship of first, second, and the third-years students for the three-year diploma course²².
- ✓ **Reimbursement of Exemption in Electricity Rate to Power loom and Handloom Weavers -** The Government of Uttar Pradesh is providing electricity to power loom and handloom weavers of the state at a concessional rate to make their weaving process sustainable.
- ✓ **Assistance in purchase of Power looms and establishment of sheds-** The Government of Uttar Pradesh supports the weavers of the state in purchase of automatic/semi-automatic power looms and establishment of sheds.

2) Highlights of New UP Textile and Garmenting Policy 2022

- ✓ **Land Cost Subsidy:** Reimbursement of 25% of land cost on purchase of land in industrial areas developed by the Government Development Authorities, except in Gautam Budh Nagar district. In Gautam Budh Nagar district, this land cost subsidy is 15% of the land cost.
- ✓ **Stamp Duty Exemption:** Land, Shed or Industrial Building purchased or taken on lease from the State or Central Government, or their undertakings will be eligible for exemption from stamp duty. 75% exemption of Stamp Duty to units setting up in Gautam Budh Nagar district and 100% exemption of Stamp Duty to units setting up in remaining districts of the state.



²¹<https://pib.gov.in/PressReleasePage.aspx?PRID=1578524>

²²<https://www.handloom.upsdc.gov.in/StaticPages/aths.aspx>



Capital Subsidy on Plant & Machinery:

- ✓ 15% Capital Subsidy on purchase of Plant & Machinery to textile and garmenting units generating employment less than 50 persons.
- ✓ 25% Capital Subsidy on purchase of Plant & Machinery to textile and garmenting units generating employment to minimum 50 persons, maximum up to INR 100 Crore (USD 12.29 Million).
- ✓ 35% Capital Subsidy on purchase of Plant & Machinery to textile and garmenting units set up in Poorvanchal and Bundelkhand regions of the state and generating employment to minimum 50 persons, maximum up to INR 100 Crore (USD 12.29 Million).

Interest Subsidy on Plant & Machinery:

- ✓ Reimbursement of 60% amount of the annual interest paid by the unit on the loan for purchase of plant and machinery eligible under TUFs/ATUFs Scheme, for a period of 07 years. The upper limit of this subsidy is INR 75 Lakhs (USD 0.09 Million) per annum per unit for units set up in Gautam Budh Nagar district and INR 1.5 Crore (USD 0.18 Million) per annum per unit for units set up in remaining districts of the state.

Infrastructure Subsidy:

- ✓ 50% of the project cost for developing self-use infrastructural amenities such as (i) Road; (ii) Drainage & Water Supply; (iii) Power Supply subject to a maximum of INR 3 Crore (USD 0.37 Million).
- ✓ 50% of the project cost for establishing ETP & DG Sets, maximum up to INR 5 Crore (USD 0.61 Million).
- ✓ 25% of the project cost for developing in-house training facility, testing laboratory, QC Labs, R&D Centre, maximum up to INR 2.5 Crore (USD 0.31 Million).
- ✓ 25% of the project cost for developing staff quarters, worker's hostel or dormitory, maximum up to INR 5 Crore (USD 0.61 Million).





Incentives related to Energy:

- ✓ 100% exemption from Electricity Duty to new Textile and Garmenting Units for a period of 10 years.
- ✓ Permission for Open Access of Electricity to Developers or Units consuming more than a threshold limit, as per Electricity Act.
- ✓ Units in PM MITRA Park, which employs more than 50 persons, will be provided a power tariff subsidy of INR 2 per unit for 5 years. The upper limit of this power tariff is INR 60 Lakh (USD 0.07 Mn) per annum per unit.

Employment Generation Subsidy: Subsidy of INR 3,200 (USD 39.34) per worker per month will be provided to mega and super mega garmenting units, except in Gautam Budh Nagar and Ghaziabad district, for a period of 5 years.

Freight Reimbursement: To promote exports of garments, freight cost of container from unit to port will be reimbursed, for 5 years as per following: -

- 75% reimbursement for 2 years
- 50% reimbursement for next 2 years
- 25% reimbursement in fifth year

Incentive for Private Textile Park: The Government of Uttar Pradesh will provide incentive for developing integrated textile and apparel park in a minimum area of 25 acres, with plug and play facility and CETP. Financial assistance of 50% of the project cost (excluding cost of land), will be provided maximum up to INR 50 Crore (USD 6.15 Million) per park.

Incentive for promotion of Silk Industry:

- ✓ 15% capital subsidy for rearing of chaaki worm, koya production, reeling and spinning in sericulture on investment up to INR 1 Crore (USD 0.12 Mn). In the case of SC/ST entrepreneurs, this grant will be 20%.
- ✓ 20% capital subsidy to silk reeling units with investments more than INR 1 Crore (USD 0.12 Mn).
- ✓ Silk reeling units producing 75% threads from koya produced in the state, will be provided an interest subsidy @5% on working capital loan for 5 years. The upper limit of this subsidy is INR 50,000 (USD 614.63) per annum.





Incentive to Youth for Starting New Employment : The youth (resident male/female of Uttar Pradesh) shall be encouraged towards Self-employment related to the production, design, marketing and export of handloom and textile products. This special facility will be available to youth (male/female) who are not above 35 years of age.

A. For Starting New Employment in Production: -

- 75% capital subsidy to set up 05–20 handlooms or 05–10 power-looms in a shed, maximum of INR 20 Lakh (USD 0.02 Mn) for handloom and INR 60 Lakh (USD 0.07 Mn) for power-loom.
- Subsidy of 50% on rent of flatted factories allotted by State Agencies for 5 years and 75% capital subsidy on Plant & Machinery, maximum up to INR 25 Lakh (USD 0.03 Mn) per unit.

B. For Starting New Employment in Design: -

75% of the project cost to set up Design Studio, maximum up to INR 30 Lakh (USD 0.04 Mn) per entrepreneur.

C. For Starting New Export House: -


75% of the registration fee and cost of infrastructure to open a new Export House, maximum up to INR 20 Lakh (USD 0.02 Mn) per company.

D. For Starting New Employment in Marketing: -

75% of the registration fee and cost of infrastructure to set up a marketing company, maximum up to INR 50 Lakh (USD 0.06 Mn) per company. Preference to the children of weavers. Further, following incentives will be given on creation of own brand through marketing and opening its outlet chain: -

- INR 2 Crores (USD 0.25 Mn) on opening 50 outlets and having minimum annual sales of INR 4 Crores (USD 0.49 Mn)
- INR 4 Crores (USD 0.49 Mn) on opening 100 outlets and having minimum annual sales of INR 8 Crores (USD 0.98 Mn)
- INR 8 Crores (USD 0.98 Mn) on opening 200 outlets and having minimum annual sales of INR 16 Crores (USD 1.97 Mn)
- INR 10 Crores (USD 1.23 Mn) on opening 500 outlets and having minimum annual sales of INR 20 Crores (USD 2.46 Mn)
- Condition: Sales from all the outlets have been made for a period of three years and 80% of the prescribed outlets have been opened outside the state.

Additional subsidy of INR 2 Crore (USD 0.25 Mn) on opening 25 or more outlets outside the country



Investment Opportunities in Uttar Pradesh

Looking at the high employment generating potential, the Government of India has extended various benefits to the Textile and Apparel sector. The highest contributors to FDI in the Textile sector of India from April 2016 to March 2021 are Japan, Mauritius, Italy, and Belgium. In Uttar Pradesh, investors can benefit from the market access arrangement in India with these countries²³. There are numerous investment opportunities across the value chain in Garmenting, Dyeing, Fabric production, Spinning, Apparel design and manufacturing, etc.

- a) **Fiber Production** - In India, Uttar Pradesh offers huge scope for man-made fiber and filament manufacturing. With the changes in consumer preferences and awareness about health and hygiene, consumption of man-made fibers is poised to grow in the future.
- b) **Spinning** - The spinning sector in Uttar Pradesh is highly advanced and competent globally in terms of price, quality and standards, offering cheap skilled labor. It is likely to grow further and adopt new technologies.
- c) **Weaving** - India forms the world's highest Installed weaving capacity, and Uttar Pradesh holds a strong position. There is an achieved strength in the manufacturing of fabric however opportunities in value-added and specialty fabrics still need to be explored.
- d) **Stitching** - Given the abundant labor force with high rates of female labor force participation in the textile sector the state has the potential to be a part of the global value chain through stitching for the apparel industry.
- e) **Apparel** - This industry alone can generate 70 jobs for every INR 1 crore (USD 122,925) invested, as compared to 12 jobs created on an average in other industries.
- f) **Technical Textiles** - is a knowledge-based industry at a nascent stage in India, which offers tremendous opportunities for joint ventures and FDI. The Indian technical textile market was estimated at USD 17.6b in 2020-21 and grew at a CAGR of 10% since 2015-16. Uttar Pradesh can be a promising destination to invest in manufacturing technical textiles in India²⁴.



²³Textile & Apparel Industry: The Change Agent of India (investindia.gov.in)

²⁴<https://www.investindia.gov.in/sector/textiles-apparel>

Sub-Segment	Opportunity
InduTech	Glass fiber, battery separator, fusing belts, high mesh filters, industry felt, woolen felt, fire-resistant fabric, slings for bulk handling
HomeTech	High quality upholstery fabric, narrow width fabric for furniture application, wipes for household use, fiber foam & wadding, fibrefill products
AgroTech	Agro shading net, packing net for agro products
GeoTech	Woven & non-woven geotextiles
ClothTech	Narrow width fabric as fashion accessories like belt
BuildTech	Scaffolding net
ProTech	Fire retardant clothes
MobilTech	Interior carpets & NVH components
PackTech	Jumbo bags, FIBC, coated fabric for soft luggage
OekoTech	PP nonwoven liners for landfill sites of MSW
MediTech	Nonwoven disposables like apron, mask, caps, draper, etc

- g) Integrated Textile and Apparel Parks** - There is also scope for integrated factories from spinning to weaving and garmenting with high automation, especially for the domestic fashion market. Integrated units can leverage economies of scale and market access benefits of set-ups in Uttar Pradesh and cater to the fast fashion requirement of consumers. Uttar Pradesh will not only create maximum jobs but also contribute to textile exports of India.
- h) Retail Brands** - The capital market in multi-brand retailing allows 51% FDI in India²⁵, Uttar Pradesh is one of the most promising destinations to set up multi-brand retail businesses through Joint Ventures, since Uttar Pradesh has the largest consumer base.
- i) E-Commerce** - With the boom in the e-commerce sector, investment in IT for handloom and textile products manufactured in Uttar Pradesh is a promising opportunity. There is a popular demand for the traditional art and finesse of Uttar Pradesh handloom products across the globe.
- j) Textile R&D Centre** - Investment in R&D for new product development by way of establishing hi-tech production centers, design studios, and training centers is another promising opportunity in Uttar Pradesh in this sector. These centers can be started as incubation centers in existing textile institutes and textile parks, already equipped with skilled and semi-skilled labor and an abundance of raw materials.



²⁵<https://www.pib.gov.in/PressReleasePage.aspx?PRID=1578132>

Key Players in Uttar Pradesh



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