



Manpower Skill Gap Study in Major Apparel, Made-Ups, & Home Furnishing Sector

July 2026

Background & Objectives

Market Size (2025)

\$194 Bn.

Domestic + exports

Direct Employment

~45 Mn.

2nd-largest employer

2030 Target

\$350 Bn.

Government ambition

Global T&A Trade

~4%

India's current share

Background

- India is a major textile producing nation with self-sufficiency in cotton and a complete value chain spanning fibre to finished garment. Yet it holds **only ~4% of global textile & apparel trade**, and its potential in garment exports remains largely untapped.
- The USD 350 Bn. ambition for 2030** implies an exponential change in productive and workforce capacity. That ambition rests, above all, on a production-ready skilled workforce.
- AMHSSC commissioned this **Manpower Skill Gap Study** to strengthen the evidence base for workforce planning in the Apparel, Made-Ups and Home Furnishing sector.
- As the industry evolves with **automation, sustainability and shifting global trade**, the study assesses the sector's current workforce, emerging skill needs and future manpower demand across 11 manufacturing clusters, and recommends how to align skilling with industry requirements.

Study Objectives

- 1 Map the workforce:** composition, skills and capability across roles and clusters.
- 2 Surface emerging demand:** skills driven by automation, MMF, digital and ESG.
- 3 Manpower projection by 2030:** under three market-growth scenarios.
- 4 Recommend interventions:** targeted actions for a competitive, future-ready workforce.

Data Source: UN Comtrade; Ministry of Textiles

Scope & Methodology

Primary Research

- **Factory & employer surveys:** roles, skills, technology, attrition, training.
- **Worker surveys:** demographics, mobility, task difficulty, training preferences.
- **Stakeholder consultations:** machinery makers, associations, training institutions.

Secondary Research

- **Trade data:** state- and cluster-level T&A export profiles.
- **Policy documentation:** PLI, infrastructure and skilling schemes.
- **Training ecosystem:** vocational syllabi and state skill-mission reports.
- **Sector & workforce research:** productivity and performance benchmarks.

Study Coverage — 11 Clusters Across 10 States

Each cluster is profiled across six lenses: **cluster overview, demographics & workforce, export profile, value-chain penetration, top product categories, and skill & training infrastructure.**

Ludhiana Punjab	K	Delhi NCR Delhi/NCR	W	Jaipur Rajasthan	W	Panipat Haryana	W	Vapi Gujarat	W	Indore Madhya Pradesh	K + W
Tiruppur Tamil Nadu	K	Erode Tamil Nadu	W	Bengaluru Karnataka	W	Kolkata West Bengal	K	Bhubaneswar* Odisha	K + W		

Three scenarios for 2030 outlook

Business-As-Usual

Broadly stable market conditions

Likely Expansion

Market Growth acceleration in tandem with current trends

Optimistic

Achieving Government's market growth targets

Key Findings

Core Sewing Machine Roles

49%

of the total workforce

Skilled Labour Scarce

54%

available with difficulty

Monthly Attrition

7.3%

MSME (8.9%) vs Non-MSME (6.0%)

Aspire to Upskill

97%

across age & gender

Skill Gap Priority Matrix

Perennial High Demand

Consistent across all clusters; direct productivity impact.

- **SMO & multi-skilling pipeline:** 43% cite multi-skilling as a top need.
- **Supervisory & mid-management:** 41% citation; most acute in emerging clusters.

Emerging High Demand

Buyer-driven urgency; partial, insufficient institutional supply.

- **Quality Management Systems:** 70% employer citation, the top emerging need.
- **Automated machine operation:** 65% cite; 84% of workers confirm automation.
- **Compliance & documentation:** rated High by 91% of employers.
- **CAD / digital pattern-making:** 63% use CAD; manual still dominant in MSMEs.

Futuristic Demand

Nascent but rising signals; limited institutional training

- **Industrial engineering / planning:** 28% cite the IE function absent in MSMEs.
- **Digital skills (MIS / ERP):** 28% employer vs. just 2% worker preference.

Emerging Roles & Supply Gaps

Automated Machine Operation

PLC & sensor diagnostics · 65% cite

Critical

ESG / Sustainability Compliance

GRI / Higg knowledge · 26%, rising

Critical

QMS Specialist

ISO 9001 for garment QA · 70% cite

High

CAD-CAM / Pattern Room Tech

2D/3D CAD · 63% use CAD

High

Digital Production Operator

ERP use & data discipline · 28%

Mod-High

MIS / Data Analyst (Mfg.)

Production analytics · 28% cite

Moderate

Expected Outcomes & Way Forward

Market Size to 2030 (USD Bn.)

2025 base: USD 149 Bn. (apparel + home textiles)

Business-As-Usual 225

Likely Expansion 251

Optimistic 277

Manpower Outlook to 2030 (Lakhs)

Additional workforce required (apparel + home-textile)

Business-As-Usual 27.0

Likely Expansion 46.7

Optimistic 66.9

Way Forward — Priority Interventions

- 1 Standardise & deepen MMF operator training via Samarth centres.
- 2 Institutionalise a supervisory development programme.
- 3 Reorient quality training to process-based QMS.
- 4 Build curricula for emerging & futuristic roles (automation, CAD, ESG, data).
- 5 Close the aspiration-access gap for women in high-gap clusters.
- 6 Benchmark curricula against competing nations (vs. Vietnam, Bangladesh, China) & build a trainer pipeline.
- 7 Integrate ESG, traceability & sustainability compliance.
- 8 Strengthen foundational industrial-engineering capability in MSMEs.