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Indian Cottons, Global Reach



TEXPROCIL CONGRATULATES WINNERS OF EXPORT AWARDS 2018-2019



AWARD FOR OUTSTANDING EXPORT PERFORMANCE 2018-2019

PRIME MINISTER OF INDIA



I am pleased to learn that The Cotton Textiles Export Promotion Council (TEXPROCIL) is organising the Export Award Function for 2018-19 and publishing a Supplement to commemorate the occasion.

The textile industry has had a long, rich tradition in our country. Our scriptures contain several references to importance and evolution of clothing. There has been a practice of naming trade routes after fabrics that were traded on these routes. Indian textiles have been appreciated throughout the world for their fine quality for hundreds of years.

Our Government has put in place processes to transform the business environment and enhance the Ease of Doing Business. We are focussed to infuse transparency and accountability in every sphere of activity.

The textile industry must adopt best practices backed by research and innovation. The mantra of 'Skill, Scale, Speed' and 'Zero Defect, Zero Effect' would help the textile industry chart an upward trajectory and give boost to its share in the global market.

The Export Award Function would surely inspire all stakeholders to strengthen the sector and set out to achieve larger goals.

I congratulate all the award winners and wish the Function all success.

Narendra Modi
Prime Minister

MINISTER OF TEXTILES AND WOMEN & CHILD DEVELOPMENT



It gives me immense pleasure to note that The Cotton Textiles Export Promotion Council (TEXPROCIL) is holding its Annual Export Award Function on 16th January 2020 at Mumbai to honour the exporters who have excelled in exports performance of Cotton Textiles in the year 2018-19. In spite of the challenges and competitiveness in the global market, Indian textiles sector has shown resilience. Indian textiles manufacturers, by dint of their market focus, product innovation, entrepreneurial spirit, etc. have enabled the sector to boost employment and growth opportunities, create sustainable value chain, contribute towards woman empowerment, and provide a livelihood to the weaker sections of the society.

The Textiles Ministry has always been supportive of the efforts undertaken by our exporters to promote growth and competitiveness of the textiles sector. The textiles manufacturers need to imbibe international best practices and diversify into emerging markets.

On this occasion, I would like to congratulate all the award winners for their robust export performance and enthrust them to set even higher standards in the future.

I also commend the Cotton Textiles Export Promotion Council (TEXPROCIL) for its sustained efforts to promote exports of cotton textiles from India.

Smriti Zubin Irani
Minister of Textiles and Women & Child Development
Government of India

COMMERCE SECRETARY



I am happy to learn that the Cotton Textiles Export Promotion Council (TEXPROCIL) is holding its Export Award function in Mumbai to felicitate member exporters for outstanding performance in the year 2018-19.

The Textiles sector being among the major employment providers in the manufacturing sector, has a crucial role and responsibility in the development of the country. This potential compliments India's significant demographic advantage of a young population for whom gainful employment is a key priority.

I am also glad to note that despite the challenge posed by the adverse global economic conditions in recent years, our vibrant entrepreneurs have relentlessly and successfully pursued increasingly ambitious export goals, and set an example for all. In 2018-2019, India's cotton textile exports reached a level of US\$ 12,403 Million, which marked an increase of 10.6% over the same period in 2017-18. I am confident that given the inherent strength and entrepreneurial skills of our exporters, the sector will continue to grow at a rapid pace.

I congratulate exporters for their outstanding performance and wish TEXPROCIL continued success in its future initiatives.

Anup Wadhwan
Commerce Secretary
Government of India

SECRETARY, MINISTRY OF TEXTILES



I am happy to know that the Cotton Textiles Export Promotion Council (TEXPROCIL) is holding its Annual Export Award Function on 16th January, 2020 at Mumbai to felicitate exporters who have excelled in the exports of Cotton Textiles during 2018-19.

The Industry has been growing significantly in recent years taking advantage of opportunities for the sector in international markets. We must commend our manufacturers, who are progressively adapting to advancements in technology to comply with stringent global standards.

Government on its part is fully committed to ensure growth of this valuable sector by developing modern training institutions, creating new infrastructure and introducing welfare programmes. We have embarked upon a multi-pronged strategy to enable the textile industry to realize its full potential so as to achieve a position of strength from where it can face international competition in global market.

I take this opportunity to appreciate the Council and congratulate the award winners for achieving excellence in export performance. I am confident that the success of the awardees will motivate other member exporters to emerge as winners next year.

Ravi Kapoor, IAS
Secretary, Ministry of Textiles
Government of India



COTTON TEXTILES EXPORTS - NEED FOR SUPPORT TO SUSTAIN EXPORT GROWTH

World Merchandise trade in 2018

As per a WTO Report, clothing was the most dynamic product among manufactured goods in the world merchandise exports, with an increase of 3.3 per cent in 2018. The volume of world merchandise trade, as measured by the average of exports and imports also grew by 3.0 per cent in 2018, just above the 2.9 per cent increase in world GDP over the same period.

Global situation

In the year 2019, on the other hand, exports of textiles & clothing have been affected by global situations. The US is increasingly turning protectionist. It has removed GSP benefits for India. The EU is struggling to deal with Brexit and slowing growth in its major economies such as Germany. The Middle East, another major export market for Indian textile products is troubled by its over-reliance on oil and increasing political tensions between Iran and the US & Saudi Arabia. Supply chains are now sourcing more locally than before. All these developments are impacting India's textiles exports. Further, countries like

Bangladesh and Vietnam are fast replacing India in areas it traditionally dominated, for example ready-made garments.

US - China Trade War - an opportunity to increase exports of textiles

The global situation has also been deeply impacted by the US-China trade conflict. The US has increased import tariffs from 10% to 25% on Chinese imports worth US\$ 200 billion w.e.f May 10, 2019. 1811 lines of textile items from Chapters 50 to 60 are included in the list of products covered for additional tariff. Products falling under Chapters 61 (Knitted apparels), 62 (Woven apparels) and 63 (Home textiles / Made ups) are not covered in the list of US\$ 200 billion worth of import from China into the US. At the same time as trade gets diverted on account of high tariffs, China is expected to vigorously sell their surplus textile products in other markets, including India to keep their factories intact.

This conflict which has now stretched over a period of 15 months has affected world trade in multiple ways. It has on the one hand disrupted the existing supply chain leading to greater uncertainties. On the other hand, it has also opened up good opportunities for India to increase exports. At the same time, China is expected to vigorously sell its surplus textile products to increase its exports raising fears of import surge.

On a balance of consideration, however, the trade conflict challenges the existing supply chains and opens up new possibilities with the US for trade growth which Indian companies should exploit by undertaking vigorous marketing efforts.

➤ Contd. on page 2

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Winner of
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Winner of
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► Article contd. from page 1

Cotton textiles exports - Current Trends – April – November 2019

During the period from April - November 2019 in the current fiscal year, exports of cotton textiles touched US\$ 6428 million as against exports of US\$ 8120 million in the same period last year registering a decline in exports by (-) 20.8%.

The negative growth in exports have been triggered by a steep decrease in exports to leading markets such as China, Bangladesh, South Korea, Vietnam, Italy and Thailand. Exports of cotton yarn to China in this period declined by a sharp 55.35% followed by Bangladesh where the decline is by 35.83%.

Need for support for the Cotton Yarn Spinning Sector

An important element to consider is the need to treat the cotton textiles sector as a value chain in continuation. Given this context, any attempt to selectively grant incentives to certain segment of the value chain leads to unintended distortions and consequences. A case in point is the systematic exclusion of cotton yarn from the package of incentives since 2014.

It is a matter of concern that there is a prevailing view that Cotton yarn is a raw material and not a value added product. Consequently, exports of only value added products should be encouraged. However, while this is not disputed what needs to

be understood is that value addition is a relative term.

For instance, as compared to raw cotton, cotton yarn is a value added item with over 75% value addition taking place in the country. Further, only about 27% of the cotton yarn produced in the country is being exported. Hence, any apprehension by sectors producing value added products like fabrics, made ups and garments that if exports of cotton yarn is encouraged then there will be shortage of yarn for the domestic industry and for the exporters, is misplaced. Cotton yarn also bears the same incidence of state and central levies as in the case of made ups and garments. The product also face high import duties in leading export markets. Cotton yarn should, therefore, be covered under the RoSCTL scheme and the MEIS. The product should also be covered under the 3% Interest Equalization scheme. When the RODTEP (Remission of Duties or Taxes on Export Products) scheme is formulated it should cover the entire value chain.

Competition

In Textiles & Clothing exports, India is facing tough competition from Countries like Bangladesh, Sri Lanka, Vietnam and Pakistan. The main reason why India is facing problem is low level of competitiveness as compared to products exported by competing nations. Further, Indian products face high import

duties in leading export markets like the US, EU, China etc as against zero duty or lower duty enjoyed by competing nations in these markets. There is an urgent need for the textiles & clothing sector to improve its competitiveness so that its share in world exports, which has remained stagnant since the last few years can increase.

Urgent need of Policy support

Various steps already initiated need to be implemented on a priority basis. For example, the RoSCTL scheme has been announced for the made ups & garments sector w.e.f March 7, 2019. However, the scheme is yet to be implemented. Further, the MEIS has also been suspended on exports of made ups and garments w.e.f August 1, 2019. This has caused very serious uncertainty and working capital problems for exporters of made ups and garments. We hope the RoSCTL scheme will be implemented at the earliest along with 4% MES for made ups and garments at the earliest.

There are still some pending claims under the erstwhile ROSL scheme discontinued with effect from March 7, 2019. The Government should refund such pending claims at the earliest. Although the GST regime has more or less stabilized, many exporters continue to face delays in refund of GST on exports. In addition, the inverted duty structure faced by the textiles

sector need to be addressed. Many exporters have been placed under the "Risky category" due to reported misuse of Input Tax Credit (ITC) used for payment of IGST on exports. While all steps should be taken to stop misuse of ITC under GST, it also need to be ensured that genuine exporters who constitutes bulk of the exporters are not put to any difficulty and inconvenience.

Way Forward

These are challenging times for exporters of cotton textiles with rapid changes all round. Leading export markets in the EU are yet to recover. Many retail chain shops in the EU which used to purchase huge quantities of textiles from India are on the verge of closure. Exporters face disability due to duty differentials in other leading markets. Moreover, most of the advance nations which are good markets for Cotton textiles are increasingly turning protectionists to protect their domestic markets. While these countries have brought down tariffs substantially in the last few years, they are resorting to other trade restricting measures such Non Tariff Barriers (NTBs) and Technical Trade Barriers (TTBs). Notwithstanding the strong headwinds of global trade, it is hoped that the enterprising nature of our exporters will certainly lead to increase in exports of Cotton textiles in the days to come. ■



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Shri Manoj Patodia
 Vice Chairman
 TEXPROCIL

REDUCE-RECOVER-REUSE: THE TRENDING R's IN TEXTILES

In today's world of fast receding natural resources, it has become very important to realise that today's waste may just be tomorrow's raw material. With overconsumption of already scarce natural resources the mantra driving international brands and retailers is "to rethink and reclaim waste materials."

Considering finished goods in textiles especially garments and home textiles, it is no longer enough to talk about what's new in design or what pattern should be next in the launch of a new product but instead it has become of great significance to trace where the materials come from, how they are processed and what we do with them and where they end up at the end of their life cycle.

In the current world of textile manufacturing it is not necessary that

modern production methods will be the most sustainable. Sourcing of raw materials has therefore become an important decision making process along with flexibility in our approach towards sustainable products. Apart from environmental benefits, promoting the recycling industry will help generate jobs and reduce dependence on scrap imports.

Textile Recycling and the Urgency to Recycle Textiles

Textile recycling is a process by which old clothing and other textiles are recovered for reuse or material recovery. The basis for the growing textile recycling industry is, of course, the textile industry itself.

Currently, there is an increasing awareness among people regarding waste collection and recycling. A potential market can be developed for recycled textiles when such recycled products are bought thereby reducing the wastage going to landfill.

India's economic growth combined with rising incomes has created a large consumer base thereby leading to growing demand for material goods. India produces nearly 62 million tonnes (mt) of municipal solid waste annually, which is likely to reach 165 mt by 2030 and 450 mt by 2045. But there is an urgent need to manage such wastes through an organised and efficient system backed with good infrastructure. According to recorded data only about one fourths of the solid waste collected is actually treated and recycled.

With billions of garment pieces and home textiles produced annually, textile recycling is a significant challenge to be addressed as we strive to move closer to a zero landfill society. Once in landfills, natural fibers can take many years to decompose while synthetic textiles may release toxic substances into groundwater and surrounding soil.

Sources of Textiles for Recycling

Textiles for recycling are generated from two primary sources. These include post-consumer, including garments, vehicle upholstery, household items and others while pre-consumer, including scrap created as a by-product from yarn and fabric manufacture, as well as the post-industrial scrap textiles from other industries.

Going circular with textiles

It is said that textiles are only as good as the yarn they are made from. The efforts of the industry need to be commended for coming up with ground-breaking innovations in keeping the environment safe. Innovative yarns through recycling form the basis for the fabrics of the future which are in turn put into various forms of creative applications in garments and home textiles.

What we throw away, sometimes carelessly, is often a valuable raw material for new things. New yarns can be obtained directly from old clothes and in some cases Indian companies are now manufacturing zero dyed coloured & shaded yarns made from recycled fabrics and clothes.

One of the world's well known sports goods manufacturer has developed sports shoes whose upper fabric material is made 100 percent from plastic residues from the sea. The raw materials for this are yarns and fibres obtained from recycled and processed sea waste. Cotton textile waste has also been known to be transformed into a new recycled yarn used to produce linens with a durable and quality fabric.

Nowadays yarns are being made from a fibre mix of crushed recycled PET bottles and natural fibres. Fabrics made from these yarns are learnt to be used in making classy bed sheets and other home textile linen as well as for apparels and sportswear.

Researchers have also found that human hair is "showing new promise" as raw material for textiles where hair is spun into yarn using traditional techniques. Human hair clippings gathered from salons are used to make an alternative to synthetic nylons that can be used for things like ropes, cords and netting. Efforts are however on to check if the yarn making process from hair will make for a "universally scalable and sustainable raw material".

Conclusion

While India provides good potential for reuse and recycling of products, there is a need felt for a more comprehensive policy for recycling. Besides enhancing overall consumer awareness, and harmonising standards and certification for such an industry there is also a need to promote public procurement.

Textile recycling teaches everyone to reuse, reduce and recycle products instead of throwing them away. At an institutional level, the government may consider setting up of a body to promote recycling among public and private players, help recyclers adopt international best-practices and enable coordination, and harmonisation among existing policies and rules to achieve a high-performance recycling economy.

Following successful examples in China, the government can also set up dedicated material recycling zones (MRZs) to help the recycling industries operate in a globally competitive fashion. However, ultimately consumer behaviour and business practices are the key in transitioning to a circular economy of Reduce-Recover-Reuse. ■



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Dr. Siddhartha Rajagopal
Executive Director
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Sustainable Innovation for Radical Transformation of Indian Textiles

Textiles offer an exciting realm of possibilities for sustainability owing to its complex value chain that involves a diverse range of inputs from the agricultural, chemical fibre, dyes & chemicals manufacturing; stitching of apparel & madeups; retail and service sector; and waste treatment.

The industry thus far has not been able to keep pace with the overall fast changing sustainable requirement of the consumer market. A major reason for the current lag is the lack of knowledge on the concept of sustainable practices and the means for achieving it.

Challenges to sustainability

In the times to come, advances in the Textile & Apparel manufacturing, which is multi billion industry, employing over 50 million people worldwide, would require sustainable innovation supported by well recognized & traceable practices.

At present, the global textile and apparel industry, is largely built on complex linear supply chains which has resulted in high human and environmental costs.

By adopting a cleaner production approach, manufacturers and brands can enjoy the 'triple bottom line' of People, Profit and Planet while contributing to overall economic growth.

Sustainable Innovation

To meet the challenges of the future, the sector needs to transform itself radically. Some frontrunners have already acknowledged this fact and have started creating innovative processes, products and business models that might enable these companies to drastically reduce their environmental footprint.

Process innovations include introducing greater transparency in raw material sourcing, incorporating traceability techniques, greater use of standards, waste management and deployment of renewable energy. Product innovation strategies propagate content recycling and increased use of bio-degradable raw material. Business model innovation includes reducing, optimizing and repairing instead of replacing, sharing and reusing.

Competitiveness & Sustainability

Sustainable principles without compromising the competitiveness can be achieved through new product development, quality improvement, scaling productivity, cost control and gradually adopting green and eco-friendly initiatives. This requires advocating value addition, sustainable manufacturing, resource optimization and environmental mitigation. All these competitive parameters of the industry will contribute in the adoption of sustainable principles.

The Sustainability Realm: Where are We Now?

Indian industry owners are more aware today and many of them are investing/ transforming to sustainable solutions in terms of environment – an indicator of which is the growing number of Green certified industries is an indicator. It is becoming difficult for industries that have been reluctant to embrace positive changes due to the active involvement of the Department of Environment, Pollution Control Board, and other law enforcement agencies. Awareness among the buyers also has increased in terms of fair prices and living wages issues.

Overcoming Challenges

For the Indian textiles sector, there exists a challenge to transform from a net exporter of textile raw materials to a producer of value added items. This requires increasing investments in independent R&D and improving industry – institute collaborations. Overall, there is a need to improve the innovative capacity of the sector as a whole rather than in silos. In sum,

today, the biggest challenge is to achieve sustainability without losing the competitiveness in the market.

Role of Industry & Policy Framework

The scope for a more coordinated, multi-stakeholder approach, including government, trade associations, and multinational brands, could help shift entrenched vested interests and open up new windows of opportunity—provided there is sustained, broad-based commitment towards developing a sustainable future.

At the recently concluded Heimtextil Fair held in Frankfurt, it was heartening to see that Indian Home Textile producers are making good use of shredded old jeans to produce beautiful bed-sheets and pillow cases, shearing woollen sweaters to make theatre drapes and utilising recycled pet bottles and waste to produce sustainable innovative home textiles.

As the demand increases & the world grapples with climate change & sustainability issues, India is surely becoming well positioned to meet global requirements.

Towards a Sustainable Future

Indian Textile and Apparel industry is making strides in ensuring ethical compliance and environmental standards in its factories. Yet gaps still exist, and filling these will be the key, if it has to reach its full potential, reinforcing long-term relationships with brands, and compete more effectively not only with Asian neighbours but across the globe. ■

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Value Added yarns
Ply, TFO/multi fold yarn
Gassed yarn
Melange yarn
Dyed yarn
Exotic blend yarn

Fancy yarns

Core spun, Slub, Neppy, Injection, Jaspe, Grindle
Linen yarn range
weaving yarn, knitting yarn, bleached yarn (10 lea to 100 lea)

www.sintex.in mktg.yarns@sintex.co.in ph: +91-79-27400500

HIGHEST GLOBAL EXPORTS

Welspun Global Brands Ltd.	Platinum
Trident Ltd. - Group Companies	Gold
Vardhman Textiles Ltd. - Group Companies	Silver

CATEGORY WISE EXPORT AWARDS

★ CATEGORY I - EXPORTS PERFORMANCE BETWEEN Rs. 5 Crores - Rs. 75 Crores

YARN

Counts 50s and below: Shroff Textile Exports - Group Companies Gold

Indo Count Industries Ltd. Silver

Counts 51s and above: Lahoti Overseas Ltd. Gold

Nitin Spinners Ltd. Silver

Processed Yarns:

Loyal Textile Mills Ltd. Gold

Damodar Industries Ltd. Silver

FABRICS

Grey: Anithaa Weaving Mill (P) Ltd. Gold

Ken Enterprises Pvt Ltd. - Group Companies Silver

Bleached/Dyed/Yarn Dyed/Printed: Loyal Textile Mills Ltd. Gold

Premier Spg & Wvg Mills Pvt Ltd. - Group Companies Silver

Denim: Malwa Industries Ltd. Gold

Dharmshil Industries Pvt Ltd. Silver

Other Fabrics Including Embroidered Fabrics, Laces etc: V-TEX Overseas Pvt Ltd. Gold

Atlas Exports (India) Silver

MADEUPS

Bed Linen/Bed Sheets/Quilts: Paramount Textile Mills (P) Ltd. Gold

B K S Textiles Pvt Ltd. Silver

Terry Towels: Intermarket (India) Pvt Ltd. Gold

Alok Industries Ltd. Silver

Other Cotton Madeups: Gupta International Gold

B K S Textiles Pvt Ltd. Silver

★ CATEGORY II - EXPORTS PERFORMANCE BETWEEN Rs. 75 Crores - Rs. 250 Crores

YARN

Counts 50s and below: S P Yarns - Group Companies Gold

Shreedhar Cotsyn Pvt Ltd. Silver

Counts 51s and above: Premier Mills Pvt Ltd. - Group Companies Gold

GTN Textiles Ltd. - Group Companies Silver

Thiagarajar Mills (P) Ltd. Silver

Processed Yarns: Sutej Textiles and Industries Ltd. Gold

Winsome Textile Industries Ltd. Silver

FABRICS

Grey: Lahoti Overseas Ltd. Gold

Pee Vee Textiles Ltd. Silver

Bleached/Dyed/Yarn Dyed/Printed: Atlas Exports (India) Gold

Alok Industries Ltd. Silver

Denim: Manomay Tex India Ltd. Gold

K G Denim Ltd. Silver



MADEUPS

Bed Linen/Bed Sheets/Quilts: L S Mills Ltd. Gold

Globe Cotyarn Pvt Ltd. Silver

Terry Towels: Sharadha Terry Products Pvt Ltd. Gold

Bhavik Terryfab (A Unit of K G Petrochem Ltd.) Silver

Other Cotton Madeups: Atlas Export Enterprises Gold

★ CATEGORY III - EXPORT PERFORMANCE ABOVE RS. 250 CRORES

YARN

Counts 50s and below: BVM Overseas Ltd. (Yarn Division of Sintex Industries Ltd.) Gold

Nahar Spinning Mills Ltd. Silver

FABRICS

Grey: Loyal Textile Mills Ltd. Gold

Bleached/Dyed/Yarn Dyed/Printed: Arvind Ltd. Gold

Gutabdas & Company-Group Companies Silver

Denim: Arvind Ltd. Gold

Raymond UCO Denim Pvt Ltd. Silver

MADEUPS

Bed Linen/Bed Sheets/Quilts: Indo Count Industries Ltd. Gold

Himatsingka Seide Ltd. Silver

Other Cotton Madeups: Asian Fabricx Pvt Ltd. Gold

SPECIAL ACHIEVEMENT AWARD

YARN Sutej Textiles and Industries Ltd. Gold

FABRICS Lahoti Overseas Ltd. Gold

MADEUPS Indo Count Industries Ltd. Gold

HIGHEST EMPLOYMENT GENERATION AWARD

Highest Employment Generation in MSME units Ken Enterprises Pvt Ltd. Gold

Gupta International Gold

Highest Employment Generation (Overall) BVM Overseas Ltd. (Yarn Division of Sintex Industries Ltd.) Gold

Highest Women Employment Generation: Loyal Textile Mills Ltd. Gold

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