



# TEXPROCIL & NEWSLETTER



A Fortnightly Publication of THE COTTON TEXTILES EXPORT PROMOTION COUNCIL OF INDIA

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## COVER STORY

### Trading with Developing Nations - the UK GSP



Shri Upendra Prasad Singh, Secretary, Textiles (R) being greeted by Shri Manoj Patodia, Chairman, Texprocil (L) & Dr. Siddhartha Rajagopal, ED, TEXPROCIL (Centre) in New Delhi on Feb 9, 2021

## CHAIRMAN'S MESSAGE

### WELCOME TO TEXPROCIL Indian Cottons, Global Reach !



#### Dear Friends,

As the days roll by we are witnessing a slow but gradual improvement in the country's trade situation.

Growing for the second consecutive month, India's merchandise exports rose 6.16% year-on-year to USD 27.45 billion in January 2021, according to provisional data of the Ministry of Commerce, Government of India.

As regards, the Cotton Textile Sector, exports of yarn / fabrics / made-ups have been showing a steady positive growth since June 2020. Recently released data for the month of January, 2021 shows that cotton textile exports marked an increase of 7.08% over January 2020. The

cumulative exports during the period April-January 2021 have reached US\$ 7.76 billion showing a decline of (-) 8.16% compared to the same period previous year.

Considering the steady recovery in exports, we expect to end the current fiscal year with a marginal decline of (-) 5% compared to the previous year, which will be a tremendous achievement considering the unprecedented disruption caused by the COVID-19 pandemic.

While the signs of trade resilience are by all accounts positive, the announcement made in Budget 2021-22 proposing imposition of Basic Customs Duty of 5% along with 5% of Agricultural Infrastructure and Development Cess (AIDC) on imports of cotton and cotton waste has come as a shock for the textile industry.

## CHAIRMAN'S MESSAGE

## Continued from Page 1

The country's cotton imports mainly constitute varieties like extra-long staple cotton that are not produced in India. This cotton variety mainly Egyptian Giza Cotton and US Pima Cotton is used to produce branded products based on specific requests from buyers mainly retail stores when exported.

In the domestic market also the imported cotton is mixed with Indian cotton to add lustre and finish to different products including lingerie and under garments.

Considering the medium to long term implications of the imposition of 10% levy on Cotton in production of value added goods in our country, I along with Shri Amit Ruparelia, past Chairman, Shri Neelabh Dalmia, GHCL and the Executive Director of the Council took the earliest opportunity to meet with the Hon'ble Minister of Textiles and Agriculture on 8th and 9th February at New Delhi.

### Meetings with Government

We met Smt. Smriti Zubin Irani, Hon'ble Minister of Textiles and Women & Child Development, Shri Upendra Prasad Singh, the new Secretary, Textiles and discussed the issue relating to imposition of Customs Duty on import of Cotton proposed in the Union Budget 2021.

We also held meetings with Shri Purushottam Rupala, Minister of State for Agriculture and Shri Amit Yadav, Director General Foreign Trade

and apprised them on the likely implications of the imposition of duty on cotton imports.

The officials gave a patient hearing to our requests made before them, and based on their suggestions the Council is working on the further course of action to be taken in the matter.

### India-EU Dialogue - Stakeholder Consultation

India and European Union had a High Level Dialogue on 5th February, 2021, led by Hon'ble Commerce and Industry Minister Shri Piyush Goyal with a focus on re-initiation of negotiations for trade and investment agreements with European Union.

As a follow-up to this high level meeting, a stakeholder consultation was held in a virtual mode on 15th February by the Ministry of Commerce. The Ministry invited the line Ministries / Departments and Export Promotions Councils / Organizations to engage in the virtual consultations. The Council participated in the virtual meet and suggested that the Indo-EU FTA should be fast tracked and a "zero for zero" tariff arrangement on the lines of the Indo-Japan CEPA should be negotiated on a priority basis including as an interim arrangement or part of an "early harvest" programme so that the Indian exporters of Textile & Clothing who are currently at a disadvantage owing to "zero duty" access given to our competitors like Bangladesh, Pakistan, Sri Lanka get a level playing field at the earliest opportunity.

The Council's views were endorsed unanimously by all the participating Textile EPC's and the Ministry of Commerce took note of the same.

Let's hope that the Government initiates the process of negotiations in the right earnest so that we can all look forward to early breakthroughs.

### Way forward

Friends, the Indian textile sector is slowly but steadily showing signs of revival and growth inspite of many constraints such as volatile cotton prices, fluctuation in yarn prices and ominous signs of a "second wave" or "third wave" of the pandemic with growing evidence of new virus strains mutating.

Given the global pandemic situation, import restrictions and protectionism being increasingly weaponised by many countries, coupled with the non-availability of containers for shipment of goods will undoubtedly weigh on world trade in the first half of 2021. Experts feel that even the weak export performance last year will have some impact on growth in 2021.

While all of us in the trade have not been immune from facing challenges from time to time, we need to keep faith and look forward to a new beginning on a daily basis.

**Manoj Kumar Patodia**  
**Chairman**

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## COVER STORY

## Trading with Developing Nations

### The UK Generalised System of Preferences (GSP)



Trade preferences reduce or remove rates of duty (tariffs) on imports from eligible developing countries into the UK. Eligible developing countries can get trade preferences through the UK Generalised Scheme of Preferences (GSP).

The country has already signed trade agreements with 62 countries ahead of the end of the Brexit transition period on January 1, 2021, including countries like Turkey, Canada, Singapore, Mexico, etc.

#### Trade between India and the UK

The UK is one of India's largest trading partners amongst the European countries in the textiles and clothing (T&C) sector, accounting for almost 24 percent of the T&C products exported from India to the EU region.

The Cotton Textiles Export Promotion Council (TEXPROCIL) has urged the Indian government to formulate a Free Trade Agreement (FTA) and start

negotiations if it does not wish to lose the first mover advantage and consequent market share in the UK.

#### The UK post-Brexit :

The UK government has taken a slew of measures to uplift the country's business sectors and ease trade relations between UK and other countries. On the external front, to reduce impact of Brexit on the economy UK is in progressive talks with developed markets including the USA and Japan. The measures undertaken internally include amendment to the UK's Tax-free and Duty-free process, implementation of the UK Internal Market bill, the UK's Membership in CPTPP and more importantly launch of the UK GSP.

The post-Brexit United Kingdom (UK) expects to establish an export program that will emulate the effects of the European Union's (EU) Generalised System of Preferences Plus (GSP+) scheme, ensuring a degree of continuity for exporters shipping goods to the UK.

#### The UK GSP Launch

The UK's generalised scheme of preferences (GSP) will cover all countries currently eligible for trade preferences under the EU's GSP after the end of the transition period. The scheme will cover all eligible countries that do not have their existing trade agreements transitioned into a new agreement with the UK. The UK's textiles and apparel imports last year were \$9.77 billion which was approximately 30 per cent of total textiles and apparel imports into the UK.

The UK GSP will have three frameworks such as least developed countries (LDC), general and enhanced. The countries in LDC framework are classified as LDCs by United Nations. Imports from these countries have quota-free access and nil rates of import duty on all goods other than arms and ammunition. Bangladesh, Cambodia, Ethiopia, Gambia, Haiti, Laos, Myanmar and Nepal are included in this framework.

The general framework has the countries that are classified as low-income and lower-middle income as per the World Bank. Imports from these countries have reduced rates of import duty on certain goods. India, Indonesia and Nigeria are included in the general framework. Algeria, Egypt, Georgia, Ghana, Guatemala, Honduras, Kenya, Morocco, Tunisia and Vietnam will receive GSP market access if they do not implement a trade agreement with the UK before January 1, 2021.



**TEXPROCIL has urged the government to negotiate an early FTA with the UK**



**TEXPROCIL E-NEWSLETTER**

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**COVER STORY**

## Trading with Developing Nations

### The UK Generalised System of Preferences (GSP)

#### India, UK Agree to Immediate 'Enhanced Trade Partnership'

- » Agreement to fast-track free trade and market access
- » Full free trade agreement could be in place by June
- » An interim deal could be agreed with immediate effect
- » UK exporters should be assessing the India market

#### Interim Agreement likely before a new India-UK FTA

The India and UK Trade Ministers reviewed the ongoing engagements between the two sides for an ETP as part of developing a roadmap towards a potential comprehensive FTA, including considerations on an interim agreement on preferential basis.

The British Foreign Secretary Liz Truss, and Piyush Goyal, India's Minister for Commerce and Industry released a joint statement on February 5, laying the groundwork for an 'Enhanced Trade Partnership' (ETP) following meetings held this past weekend in Delhi.

The UK and India have been examining the potential for a full Free Trade Agreement, and discussions were carried out on the entire range of bilateral trade and economic relations, while understanding each other's priorities and trade sensitivities. Both Trade Ministers reiterated their commitment to long term India-UK



partnership and agreed to deepen trade cooperation between the two countries through an ETP. They also reviewed progress in removing market access barriers on both sides.

Meanwhile, the European Union (EU) also met with Indian officials virtually on Friday, February 5, holding a high-level dialogue for the first time. The EU-India high-level dialogue was co-chaired by Minister of Commerce and Industry, Piyush Goyal, and the European Union Executive Vice-President and Trade Commissioner, Valdis Dombrovskis. The ministers "agreed for further deepening of bilateral trade and investment relationship through a series of regular engagements, aiming at quick deliverable for the businesses in these tough times" (India-briefing.com)

The countries included in enhanced framework are classified by the World Bank as low-income and lower-middle income countries. They must also implement 27 conventions relating to human and labour rights, environment and good governance. Imports from these countries have a nil rate of import duty on certain goods. Armenia, Bolivia, Mongolia, Pakistan, the Philippines and Sri Lanka are included in this framework. The UK will provide a graduation period of at least three years before removing a country from the relevant framework.

Preferential rates of import duty may be suspended on a specific product group that is already highly competitive without trade preferences. This is known as goods graduation. The UK's first list of graduated goods replicates the EU's current list of graduated goods until the end of 2022. The next list of graduated goods will take effect in 2023. It will be reviewed every three years.

#### Continuation of the GSP benefit

According to UK's Export Development Board (EDB), along with a few other countries, Sri Lanka will continue to enjoy EU GSP benefit from 2021 post-Brexit. The UK is the second largest export market for Sri Lanka after the US. Exports to UK in the first 10 months of 2020 amounted to \$766.72 million and rose by 39 per cent to \$102.50 million in October as per provisional data.

According to EDB, after the transition period, the UK Global Tariff (UKGT) would replace the EU's Common External Tariff. UK Generalised Scheme of Preferences (UK GSP) would apply from January 2021.

The proposed Enhanced Framework of the UK replicating EU-GSP Plus criteria is expected to be enforced on January 1, 2021 for a three-year-period from 2021 to 2023. As per the information of the Sri Lanka High Commission in the UK, the current EU GSP Rules of Origin criteria will be applicable till



To understand more about the UK Generalised Scheme of Preferences (GSP) kindly visit the following link:

[UK-Generalised-Scheme-of-Preferences](#)

Download the UK Generalised Scheme of Preferences (GSP) (ODS,571KB) to check which goods are eligible:

[UK-GSP-List-of-eligible-goods](#)

Kindly send your feedback and comments to TEXPROCIL on email : [rajesh@texprocil.org](mailto:rajesh@texprocil.org)

**COVER STORY**

## Trading with Developing Nations

### The UK Generalised System of Preferences (GSP)

December 31, 2023 and the exemptions of the EU-GSP Rules will be available in a different terminology such as bilateral, regional, cross-regional, and extended cumulation.

A beneficiary country intending to apply for extended or cross regional cumulation has the option to submit a joint application to the UK authority once the Enhanced Framework is enforced.

With regards to the proof of origin of exported goods, the Registered Exporters System (REX system), which is in use at present, will be discontinued from December 31, 2020. However, a similar self-declaration form or a Certificate of

Origin (COC) Form A will be introduced by the UK authority. More details and guidelines on the COC will be issued shortly by the UK authorities.

During the three-year-period from 2021 to 2023, the UK will review the eligibility criteria, rules of origin criteria and guidelines to develop its bespoke preferential scheme. The stakeholders too will be consulted in this process.

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### Advertisement Package for promoting products and solutions in the E-publications of TEXPROCIL

**Dear Madam/Sir,**

As a part of TEXPROCIL's knowledge sharing initiatives, the Council is coming up regularly with various E-publications. The circulation of these publications, averaging to over 3000 avid readers, includes the Council's strong database of 2,000 nos. membership comprising manufacturers, exporters, traders of Indian cotton fibre, yarn, fabrics and madeups range of products. The readership database also includes the contacts of textiles trade associations, government representatives, foreign missions, etc. which are being updated from time to time.

The Council has planned to offer an '**Advertisement Package**' for the various E-publications with a view to enhance the exposure of products and solutions being offered by various entities. We request you to kindly consider the advertisement opportunity as per details attached.

E-publication details are as follows:

1. **E-Newsletter** – Published every fortnight – Launch of New Volume in the last fortnight of January 2021.

2. **IBTEX** – Published daily – Includes news clippings on articles of interest in T&C appearing in various publications.

Advertisement Package details are given below this column.

For further clarifications you may like to advise your office to kindly write to Mr. Rakesh Chintal, IT Officer/ Mr. Rajesh Satam, Joint Director on email: [rakesh@texprocil.org](mailto:rakesh@texprocil.org) / [rajesh@texprocil.org](mailto:rajesh@texprocil.org).

For queries related to booking your advertisement kindly write to Mrs. Mrunal Sawant on email: [mrunal@texprocil.org](mailto:mrunal@texprocil.org).

We look forward to receiving your enquiries / confirmation for availing the advertisement opportunity in E-publications of TEXPROCIL.

**Regards,**

**Dr. Siddhartha Rajagopal**  
Executive Director

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**POLICY TALKS****Changes in Customs Law and Procedure**

By Ravi Kumar, Joint Director, TEXPROCIL

**CBIC (Central Board of Indirect Taxes and Customs) has launched the “Turant Customs” initiative aimed to facilitate “Ease of Doing Business”. The objective of the initiative is to move towards Faceless, Paperless and Contactless Customs Measures. Under this, importers will now get their goods cleared from Customs after a faceless assessment done remotely by the Customs officers located outside the port of import.**

**Faceless Assessment on Import**

Faceless Assessment of import cargos was launched throughout the country on October 31, 2020.

**Alignment of data with GSTN**

CBIC has also mandated exporters and importers to declare the GSTINs on the import and export documents from February, 2020. This has been done with the purpose of alignment of data with GSTN and to capture district / state data for promotion of exports. CBIC is also in the process of putting in place more initiatives under the “Turant Customs” programme with measures such as automated clearances of export consignments, implementation of tamper-proof packing of samples and their electronic tracking.

**Progressing towards “Make in India”**

CBIC has launched a revamped and streamlined program to attract investments into India and strengthen “Make in India” through a scheme under the Customs Act, 1962. As per Section 65 of the Customs Act, 1962 “manufacturing and other operations can be carried out in a Customs Bonded Warehouse. The scheme has been simplified by the introduction of the “Manufacture and Other Operations in Special Warehouse Regulations, 2020 and the issue of CBIC Circular No. 36/2020 dated 17.08.2020. A single digital account has been prescribed for ease of doing business and easy compliance.

**Strict compliance Norms introduced for imports under FTAs**

In order to fulfill the gaps in Operational Procedures under Rules of Origin of various Free Trade Agreements (FTAs) and effectively implement preferential treatment of good under FTAs, Customs (Administration of Rules of Origin under Trade Agreements) Rules, 2020 (CAROTAR, 2020) have been notified with effect September 21, 2020. The new provisions provide for a basic level of due diligence on the part of an importer to satisfy himself that the criteria of Rules of Origin have been met, and that mere submission of a Certificate of Origin (COO) may not be sufficient. CAROTAR has specifically laid down certain obligations on the importer and has prescribed for time bound verification from exporting countries in case of doubt. Pending verification, preferential

benefits will be suspended and goods shall be cleared only on furnishing security equal to the differential duty. In certain cases, the preferential rate of duty may be denied without further verification. This would go a long way in checking the import of third – country goods by misusing the Rules of Origin provisions under the FTAs.

**Changes in Basic Customs Duty (BCD)****(i) Customs duty structure to encourage domestic value addition**

The Customs duty rate structure are being guided by a conscious policy of the Government to incentivize domestic value addition under “Make in India “ and “Atmanirbhar Bharat” initiatives which envisages imposition of lower duty on raw materials and providing reasonable tariff support of goods being manufactured in India. Accordingly, the Most Favoured Nation (MFN) rates of Basic Customs Duty (BCD) have been increased in recent years on such items which are being manufactured in India or which domestic industry has got the potential to manufacture. Accordingly, during the last 6 years, about 4000 tariff lines (approximately 1/3rd of total tariff lines) have seen an upward calibration of BCD. At the same time, duties on inputs and raw materials have been rationalized.

**(ii) MFN rates increased protect domestic manufacturing**

The Customs duty structure is calibrated as and when required in consultation with the line Ministries and trade bodies to incentivize domestic value addition and promote “Make in India” scheme in case of manufactured goods. An analysis of the Import data for 2018-19 made to identify those manufactured items where there is a surge in imports have revealed that imports under FTAs have increased significantly. Although MFN rates of duties on a large number of intermediate and finished goods had increased over the last few years to protect the domestic manufacturing industry from cheap imports, it is observed that in the case of a large number of commodities where the applied rate of customs duty have been increased, large volume of imports have started coming into the country through the FTA partners of India. Concerted and adequate efforts, therefore, need to be taken to remove instances of inverted duty structure on imports..

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## YARN UPDATE

## Cotton Yarns



**Ashwin Chandran, Chairman of Yarn Subcommittee of TEXPROCIL and Chairman of SIMA, discusses the current situation facing the Indian cotton yarn sector.**

**Indian spinners need to focus on sustainability, recycled products, BCI, etc and cater to the premium segment of the market**

### ◆◆ KEY TRENDS TO WATCH ◆◆

- ◆ Increasing focus on value addition ◆ Speculative Demand & Stocks ◆ Volatility in Prices
- ◆ Bullish Cotton Futures in the international trade ◆ Yarn export from India records growth

Kindly send your  
feedback on email:  
[ravi@texprocil.org](mailto:ravi@texprocil.org)

### Need for value added yarn manufacturing

India was the largest supplier of organic textile products until recent times. However, in view of the declining availability of Organic cotton and steep increase in the premium for organic cotton in India, importers of finished products are resisting the increase in prices. With the declining availability of organic cotton textiles, retailers across the world are bound to look for other value added products. In order to maintain export of value added yarns and finished products, it is important for the Indian spinners to focus on sustainability, recycled products, BCI and such initiatives, to cater to the premium segment of the market.

### Speculative demand for cotton yarn

As you are aware, cotton yarn prices started declining during the last week of January and the first week of February 2021. However, it is reported that weaving yarn prices started increasing in some of the production centres for the past one or two weeks. This volatility in yarn prices is partly because of speculative trading in yarn and also an increase in demand from the domestic market. It is important that yarn consumers should understand the market dynamics in current market conditions and make sure unnecessary stock building is not happening to avoid price volatility.

### Cotton scenario

ICE Cotton futures is trading at approx. 92 to 93 US Cents per pound for delivery during May to July 2021, whereas Indian cotton is being traded at a price lower than International prices by more than 10 %. Against a 12% rally in ICE cotton futures since the beginning of Feb 2021, domestic cotton futures have risen by less than 5% during the period. Persistent rally in cotton prices in global market is likely to keep domestic cotton price range-bound on the higher side for the near future.

If the price difference between Indian cotton and ICE futures maintains at present levels, yarn prices in India will continue to be lower than yarn prices in other major supplying countries. However, increase in prices of imported ELS cotton combined with customs duty is putting pressure on the entire value chain. Egyptian Giza cotton prices have gone up by almost 25% and US Pima cotton prices have gone up by 30% over the past six months.

### *Reasons for bullish cotton futures in the international trade can be attributed to:*

- World Agriculture Supply and Demand Estimates (WASDE) in February reported lower global cotton stock and higher consumption during the current year.
- ICAC cotton update for the month of January indicates that the world cotton output for the year 2020-21 is estimated to decrease by 7% and consumption is estimated to increase by 6%.
- As far as long staple and extra-long staple cotton are concerned, world output for the cotton year 2020-21 is estimated to be lower by 18%, whereas world consumption is estimated to increase by 16%.
- Declining quality parameters of long staple cotton in India and China
- Continuation of restrictions in USA for importing cotton based products made of Xinjiang cotton resulting in large volumes of cotton and yarns being imported into China for further value addition.

### Export front

Export data for the month of December shows that there was an increase of 1.8% in export of cotton yarn in the month of December 2020 compared to December 2019. Overall export of cotton yarn for the year 2020 was 1,010 mn kgs, recording a marginal increase of 1.1% compared to export of 999 mn kgs in the year 2019. In the year 2020, Bangladesh, Vietnam and Turkey were the three major markets that fuelled a positive growth in export of cotton yarn from India, while export to most of the other markets recorded either declining trend or a marginal growth.

Owing to increasing price trend in cotton and yarn over the past three months, across the world, there is an overall acceptance of higher prices in major importing countries. There are reports that retail chains in the US are able to increase their selling prices. Market forces will determine how long this increasing price trend will last.

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## FABRICS UPDATE

## Cotton Fabrics



**Nikunj Bagadia, Chairman of Fabrics Subcommittee of TEXPROCIL and owner of Ken Enterprises, discusses the current situation facing the Indian cotton fabrics sector.**

**If the yarn prices remain stable, demand for fabrics will pick up...**

### Demand Scenario

Cotton yarn prices in India moved northwards during the later part of last year and made a correction during early February. However, in the last week further spikes in the yarn prices are now playing havoc with the sentiments of the downstream customers.

This month started off with a 10~15% correction in the yarn prices which did kick start some export demand that was completely dormant for the last 6~8 weeks. 0000

Market stalwarts observe that a cool-off in cotton/yarn prices is desirable in order to restore equilibrium in downstream industry and to bring various sectors of textiles back in balance. This, they believe, could take around 3-4 months. If the global prices stabilise post March, as widely believed, yarn prices will ease too.

Since yarn prices are yet to adjust itself in the downstream industry, textile millers and garments unit owners are "not too anxious about obtaining stocks at the moment". All this has now led to a wait & watch scenario with the end buyers but, if the yarn prices remain stable, fabric demand will pick up.

### Trade in cotton fabrics

For the period January to November, India's overall exports of cotton fabrics declined by 14.17% from US\$ 2291 million to US\$ 1967 million. The main countries where cotton fabrics were exported were Bangladesh, USA, Sri Lanka and Korea. There was a positive growth (40%) in India's export to USA while all other countries recorded a negative growth.

Approx. 65% of India's export to USA was primarily in the items under HS 590390 (Textile Fabrics (Other Than Tire Cord) Impregnated, Coated, Covered Or Laminated With Plastics) and HS 600621 (Knitted Or Crocheted Fabrics, Of Cotton, Unbleached Or Bleached). About 25% of the exports were in various HS lines of woven cotton fabrics including exports worth US\$ 4.5 million of Denim fabrics under HS 521142.

Of the total export of US\$ 1967 million of cotton fabrics from January to November 2020, dyed fabrics constituted the major share of export with US\$ 999.3 million, a share of 51% followed by export of grey fabrics with US\$ 450 million with a 22.8% share. Export of printed fabrics (mainly to Africa) were US\$ 359 million which constituted a share of 18%.

The overall exports of Grey fabric showed a decline of 1.5% while exports to USA, Korea and Sri Lanka showed positive growth. Both dyed and printed fabric exports showed a decline of 22% and 24% respectively.

### A hopeful revival

Firmness in the domestic market is attributed to significant price rise in global markets, where strength in global cotton prices is due to anticipation of lower world cotton output and improved stock-usage ratio. This goes to prove that cotton yarn prices will cool off only when cotton prices halt.

The domestic prices of Rayon fabrics & yarn are under pressure, with the yarn prices correcting by almost ₹15~20/kg. Even the fabric prices have corrected by almost 10~12% & demand is very low owing to increased supply of rayon fabric from most of the weaving hubs.

A recent ICRA report said in its key metrics section that 'Supported by export demand, even as demand from domestic downstream segments may recover at a slower pace, yarn realisations and contribution margins are expected to remain at comfortable levels in FY2022'.

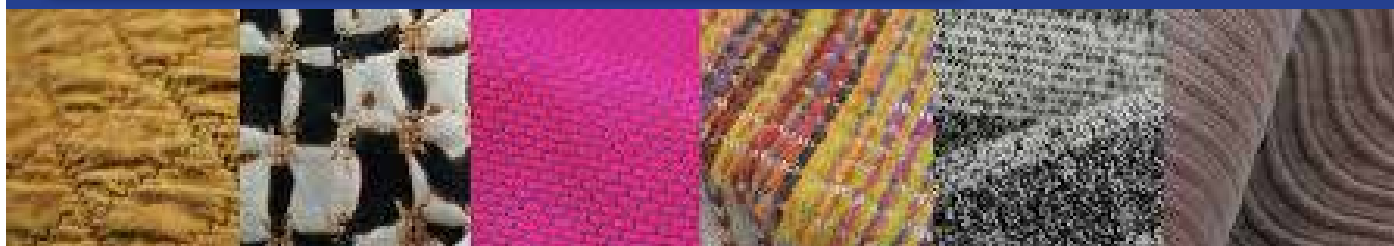
Export enquires for fabrics have increased substantially compared to the last 2 months, but the yarn price increase is not helping that cause.

**:: TEXPROCIL ::**

### ♦♦ TRADE DATA ♦♦

◆ Please click the following link to access the trade data giving details on the [INDIA'S EXPORTS OF COTTON FABRICS](https://www.texprocil.org/india-exports-of-cotton-fabrics)

Kindly send your feedback on email:  
[shailesh@texprocil.org](mailto:shailesh@texprocil.org)





## HOME TEXTILES UPDATE

## Home Textiles



### Sharp recovery in demand can assure a promising future for Indian Home Textiles

Higher in-home consumption due to increased stay-at-home period and a sharper focus on health and hygiene amid the pandemic are helping Indian home textile exporters.

Available reports highlight that the Rs. 55,000 crore Indian home textile sector, comprising products such as terry towels, bed sheets and spreads, pillow cases, curtains, and rugs and carpets that derives as much as 60-70% of its revenue from exports is witnessing good growth.

The improvement is borne out by a 7% on-year sales growth in the fiscal second quarter for few home textile exporters with integrated operations who had logged 40% lower revenue on-year in the first quarter. Continued order flow from major export markets, improvement in domestic demand, and the ability of players to manage liquidity amid the continuing pandemic will be the key to success in the sector.

As pandemic arrived, most of these companies reportedly jumped on the opportunity of manufacturing masks, PPE kits, anti-viral bed sheets and towels, which proved to be a big saviour for the home textile firms. Apart from the antiviral products, masks and other goods, these firms also looked at sleep related innovations which is becoming a very important aspect.

#### Commenced sales but margins hit

A weak first quarter will have a bearing on revenues for the full fiscal, which are expected to decline 10-12%. This, revenue de-growth for home textile exporters will be limited to 10-12% this fiscal as compared with 30-35% for the overall textile sector. The United States and the European Union account for over 80% of these exports, with big-box retailers of essentials and departmental stores among the major customers.

Also, lower capacity utilisation and benign realisations in the first quarter will lead to suboptimal coverage of fixed costs despite competitive cotton prices and favourable currency movement. Reports suggest that this will lead to moderation in the operating margin of home textile exporters by 200 basis points to 12-13% from 15% seen over the past two fiscals. As per the reports lower revenues would hurt operating margins. However, lower requirement of capacity addition and working capital will limit material moderation in the credit profiles of home textile exporters this fiscal.

#### Export Orders improve amidst challenges

After China, India is the largest producer of cotton and has vertical integrated facilities here which attributes to the growth of country in home textiles segment.

Export order flow has improved significantly beginning with the second quarter of current fiscal due to reopening of departmental stores and pent-up demand. With people spending more time at home, including for work, drastically lower socialising opportunities, and sharper focus on health and hygiene, demand for home textile products will continue to grow. Demand is expected to stay strong in the third quarter as well due to the festive season.

Unfortunately, this same growth in demand is being massively hampered by the logistics implosion as there are currently not enough containers to feed the export demand, and there is a shortage of space on vessels that do come into India.

Home textile manufacturers deriving a larger part of their revenue domestically are affected more than exporters due to extensive lockdowns in India and gradual opening of many retail outlets, leading to slower recovery.

#### Towards a promising future

Indian home textile products have always been appreciated in the international market; the products exhibiting a unique signature; mix of hand woven and machine made products. Especially, products like bed sheets, pillow cases, curtains, cushion covers, rugs, carpets, etc. are in demand from India as we are known for beautiful fabrics, finishes and also because there has been a gradual shift in the buying behaviour from China especially in the US and Japan due to pandemic. We should definitely convert this opportunity into possibility.

Furthermore, India as compared to China and other Asian factories has traditionally produced hand crafted labour intensive home textile products, which were more expensive for the middle/upper middle market. However, now in the future,

**TRADE  
ENQUIRY****Enquiries for Indian Cotton Textile Products****Company Name & Contact Person****KS Seguridad Industrial**

Chile

**Roberto Valdivia Z.**

Purchase Manager

**Contact Details**

Email: rvaldivia@ksltda.cl

Website: www.ksltda.cl

Tel: +569 64716622 / +562 25553343

**Items of Interest**

Sourcing for Indian suppliers of denim fabrics. Importer needs these fabrics for the production of trousers and jackets

**Company Name & Contact Person****Ms. Elena Ruiz,**

Spanish designer

Madrid,

Spain

**Contact Details**

Email: eruizmirete@gmail.com

Ana Sotelo: 660325055

Élena Ruiz: 629611696

**Items of Interest**

Interested to source cotton and silk fabric with ethnic designs or otherwise, urgently for her spring / summer collection.

**Company Name & Contact Person****Sisili Projects (Pvt) Limited,**

No. 05, Rheinland Place,

Colombo 03, Sri Lanka

**Mr. Susiri Kumararatne**

Director

**Contact Details**

Email: susiri@sisiliprojects.com

Tel: +94 112 576050 / +94 112 575175

**Items of Interest****Purchase of Cotton Yarn from India**

- 40 single 100% Cotton grey yarn
- 1.85 Kgs per corn
- Annual requirement is 360,000 KGs
- Port of delivery: Colombo, Sri Lanka

**Company Name & Contact details****Guillermo Quijano**

Movil 57 3103965800

Medellin, Colombia

**Contact Details**

Email: gaquijano@hotmail.com

**Items of Interest****Viscose Tencel 1.4 X 38 A 100 Yarn****DISCLAIMER**

Kindly verify credibility of buyers in the importers database at your own interest. The Council is not responsible for the status of their existence and recent developments in their credibility.

**:: TEXPROCIL ::****HOME TEXTILES  
UPDATE****Home Textiles**

Indian factories need to re-think strategy, and offer products for the mass market, which can be made using technology and involves cost effective production process. This will be the only way to compete with China and grow in the long term. At the same time growth will also come from increased focus on eco-friendly finishes, new techniques of digitalisation, e-commerce market place, design and product innovation.

With the commencement of the New Year the trend of work from

home will continue as the world is still experiencing the virus mutating differently every time. This will keep up the demand of home textile products, however, exporters and manufacturers will face tighter margins. The market are expected to stabilize by the end of 2021. Indian home textile exporters are definitely witnessing a sharp recovery in demand and thus the future looks promising !

**:: TEXPROCIL ::**

Avail of more detailed information on  
**EXPORT MARKETS @ TEXPROCIL**  
Please Visit our website: [www.texprocil.org](http://www.texprocil.org)  
email: [info@texprocil.org](mailto:info@texprocil.org)

## DESIGN CORNER

Pantone announces  
'Color of the Year 2021'

**PANTONE 17-5104**  
**Ultimate Gray**

+

**PANTONE 13-0647**  
**Illuminating**

**A marriage of color  
conveying a message of  
strength and hopefulness  
that is both enduring  
and uplifting !**

PANTONE 17-5104 Ultimate Gray + PANTONE 13-0647 Illuminating, two independent colors that highlight how different elements come together to support one another, express the mood for Pantone Color of the Year 2021.

Practical and rock solid but at the same time warming and optimistic, the union of PANTONE 17-5104 Ultimate Gray + PANTONE 13-0647 Illuminating is one of strength and positivity. It is a story of color that encapsulates deeper feelings of thoughtfulness with the promise of something sunny and friendly.

A message of happiness supported by fortitude, the combination of PANTONE 17-5104 Ultimate Gray + PANTONE 13-0647 Illuminating is aspirational and gives us hope. We need to feel that everything is going to get brighter – this is essential to the human spirit.

As people look for ways to fortify themselves with energy, clarity, and hope to overcome the continuing uncertainty, spirited and emboldening shades satisfy our quest for vitality.

PANTONE 13-0647 Illuminating is a bright and cheerful yellow sparkling with vivacity, a warming yellow shade imbued with solar power.

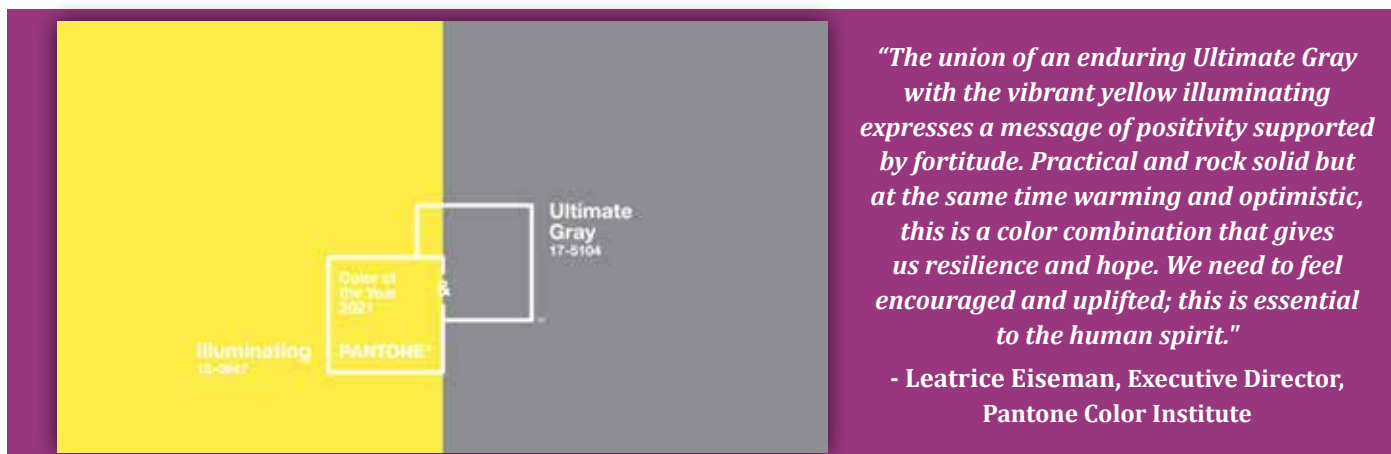
PANTONE 17-5104 Ultimate Gray is emblematic of solid and dependable elements which are everlasting and provide a firm foundation. The colors of pebbles on the beach and natural elements whose weathered appearance highlights an ability to stand the test of time, Ultimate Gray quietly assures, encouraging feelings of composure, steadiness and resilience.

Emboldening the spirit, the pairing of PANTONE 17-5104 Ultimate Gray + PANTONE 13-0647 highlights our innate need to be seen, to be visible, to be recognized, to have our voices heard.

A combination of color whose ties to insight, innovation and intuition, and respect for wisdom, experience, and intelligence inspires regeneration, pressing us forward toward new ways of thinking and concepts.





**DESIGN CORNER****Pantone announces  
'Color of the Year 2021'**


*"The union of an enduring Ultimate Gray with the vibrant yellow illuminating expresses a message of positivity supported by fortitude. Practical and rock solid but at the same time warming and optimistic, this is a color combination that gives us resilience and hope. We need to feel encouraged and uplifted; this is essential to the human spirit."*

- Leatrice Eiseman, Executive Director, Pantone Color Institute

**ABOUT PANTONE COLOR OF THE YEAR**

For over 20 years, Pantone's Color of the Year has influenced product development and purchasing decisions in multiple industries, including fashion, home furnishings, and industrial design, as well as product packaging and graphic design.

The Pantone Color of the Year selection process requires thoughtful consideration and trend analysis. To arrive at the selection each year, Pantone's color experts at Pantone Color Institute comb the world looking for new color influences. This can include the entertainment industry and films in production, traveling art collections and new artists, fashion, all areas of design, popular travel destinations, as well as new lifestyles, playstyles, and socio-economic conditions. Influences may also stem from new technologies, materials, textures, and effects that impact color, relevant social media platforms and even upcoming sporting events that capture worldwide attention.

**ABOUT PANTONE COLOR INSTITUTE™**

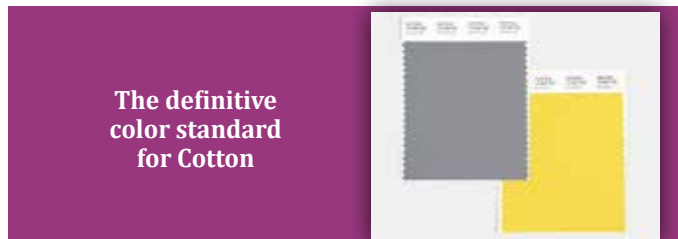
Pantone Color Institute is the business unit within Pantone that highlights the top seasonal runway colors, selects the Pantone Color of the Year, forecasts global color trends, and advises companies on color for product and brand visual identity. Through seasonal trend forecasts, color psychology, and color consulting, Pantone Color Institute partners with global brands to effectively leverage the power, psychology, and emotion of color in their design strategy.

Source: [Pantone.com](https://www.pantone.com)

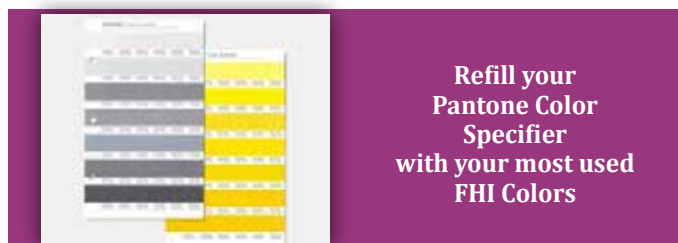
:: TEXPROCIL ::

**PANTONE COLOR OF THE YEAR - OTHER RESOURCES****1) FORMULA GUIDE, LIMITED EDITION PANTONE COLOR OF THE YEAR 2021**


Visualize and communicate color for graphics and print

**2) COTTON SWATCH CARD**


The definitive color standard for Cotton

**3) FASHION, HOME + INTERIORS COLOR SPECIFIER REPLACEMENT PAGES**


Refill your Pantone Color Specifier with your most used FHI Colors

Source: [Pantone.com](https://www.pantone.com)



## TRADE DATA

TEXPROCIL Analysis of Textiles & Clothing  
for JANUARY 2021

As per the quick estimates released by Ministry of Commerce, Cotton Textile exports reached a level of USD 974 million in January 2021 marking a growth of 7.08 per cent against the corresponding month of January 2020, wherein exports were valued at USD 909 million.

In rupee terms, exports during the month of January 2021 reached a level of Rs. 7,117 cr. as against Rs. 6,484 Cr. in January 2020 recording a growth of 9.77 per cent in rupee terms.

Exports of cotton textiles during the period April – January 2021 have shown a decline of (-) 8.16% reaching a level of USD 7.76 billion over the previous year with exports of USD 8.45 billion during the period April – January 2020. The decline of 8% is mainly because of steep falls in April/May.

It may also be noted that exports of cotton textiles have shown positive growth from June 2020 onwards till January 2021.

## India's Cotton Textiles Export Update for FY (April – January) 2020-21

Exports	Values in Million USD				% Change	
Commodities	JAN'20	APR'19 -JAN'20	JAN'21	APR'20 -JAN'21	JAN'21	APR'20 -JAN'21
Cotton Yarn/Fabs./made-ups, Handloom Products etc.	909	8,452	974	7,763	7.08%	-8.16%
Man-made Yarn/Fabs./made-ups etc.	449	4,042	406	2,927	-9.62%	-27.58%
RMG of all Textiles	1,451	12,896	1,296	9,495	-10.73%	-26.37%
Jute Mfg. including Floor Covering	31	292	39	285	27.68%	-2.58%
Carpet	119	1,176	147	1,195	23.69%	1.59%
Handicrafts excl. handmade carpet	149	1,516	180	1,353	21.09%	-10.76%
Textiles	1,657	15,479	1,746	13,523	5.38%	-12.64%
Apparel	1,451	12,896	1,296	9,495	-10.73%	-26.37%
<b>Textiles &amp; Apparel</b>	<b>3,109</b>	<b>28,374</b>	<b>3,042</b>	<b>23,018</b>	<b>-2.14%</b>	<b>-18.88%</b>
All Commodities	25,853	264,128	27,447	228,249	6.16%	-13.58%
% Share of T&C in Total Exports	12.0%	10.7%	11.1%	10.1%		

Exports	Values in Rs. Crores				% Change	
Commodities	JAN'20	APR'19 -JAN'20	JAN'21	APR'20 -JAN'21	JAN'21	APR'20 -JAN'21
Cotton Yarn/Fabs./made-ups, Handloom Products etc.	6,484	59,588	7,117	57,623	9.77%	-3.30%
Man-made Yarn/Fabs./made-ups etc.	3,203	28,503	2,968	21,715	-7.35%	-23.81%
RMG of all Textiles	10,351	90,837	9,473	70,431	-8.48%	-22.46%
Jute Mfg. including Floor Covering	220	2,060	288	2,109	30.86%	2.37%
Carpet	847	8,294	1,074	8,864	26.80%	6.87%
Handicrafts excl. handmade carpet	1,063	10,689	1,319	10,027	24.14%	-6.19%
Textiles	11,817	109,134	12,767	100,338	8.04%	-8.06%
Apparel	10,351	90,837	9,473	70,431	-8.48%	-22.46%
<b>Textiles &amp; Apparel</b>	<b>22,168</b>	<b>199,971</b>	<b>22,240</b>	<b>170,769</b>	<b>0.32%</b>	<b>-14.60%</b>
All Commodities	184,370	1,861,741	200,661	1,696,367	8.84%	-8.88%
% Share of T&C in Total Exports	12.0%	10.7%	11.1%	10.1%		

Imports	Values in Million USD				% Change	
Commodities	JAN'20	APR'19 -JAN'20	JAN'21	APR'20 -JAN'21	JAN'21	APR'20 -JAN'21
Cotton Raw & Waste	35	1,254	53	311	50.28%	-75.21%
Textile yarn Fabric, made-up articles	178	1,689	179	1,154	0.77%	-31.64%

Imports	Values in Rs. Crores				% Change	
Commodities	JAN'20	APR'19 -JAN'20	JAN'21	APR'20 -JAN'21	JAN'21	APR'20 -JAN'21
Cotton Raw & Waste	253	8,831	390	2,316	54.05%	-73.77%
Textile yarn Fabric, made-up articles	1,270	11,904	1,312	8,565	3.31%	-28.05%

Source: DGCIS/MOC

**TRADE DATA****Import Tariff on Cotton textiles (Yarn, Fabric, Madeups)  
in major importing countries****Average Tariff rates (%) on import of cotton yarn in different markets**

Importing Countries	Top 5 Exporting Countries				
	India	Vietnam	China	Pakistan	United States
China	3.50% (APTA)	0%		0%	5%
South Korea	8%	0%	8%	8%	0%
Vietnam	0 to 5%	---	5%	0%	5%
EU (27)	4%	0%	4%	0% (GSP+)	4%
Japan	0%	0%	5.60%	4.48%	5.60%
Guatemala	5%	5%	5%	5%	0%
El Salvador	5%	5%	5%	5%	0%
Peru	6%	6%	6%	6%	0%
Pakistan	5% (SAFTA)	11%	5%		11%
United States	3.70%	3.70%	3.70%	3.70%	--
Sri Lanka	0%	0%	0%	0%	0%
Thailand	0%	0%	0%	5%	5%
Malaysia	6%	0%	10%	0%	10%
Mexico	10%	10%	10%	10%	0%
Mauritius	0%	0%	0%	0%	0%

Remarks: Above Table gives an idea of average import tariff. There may be minor change depending on exact HS codes

**Average Tariff rates (%) on import of cotton fabrics in different markets**

Importing Countries	Top Exporting Countries									
	China	India	Pakistan	Vietnam	South Korea	Taiwan	Japan	Turkey	USA	EU27
Bangladesh	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
Sri Lanka	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Vietnam	5%	7.50%	12%	-	0%	12%	0%	12%	12%	12%
S Korea	4%	0%	10%	0%	-	10%	10%	0%	0%	0%
China	-	8%	0%	0%	0%	0%	8%	8%	8%	8%
Indonesia	0%	5%	0%	0%	0%	10%	0%	10%	10%	10%
Hong Kong	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Cambodia	0%	5%	7%	0%	5%	7%	7%	7%	7%	7%
Mexico	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
USA	8.40%	8.40%	8.40%	8.40%	0%	8.40%	8.40%	8.40%	-	8.40%
Turkey	8%	8.00%	6.40%	6.40%	0%	8%	8%	-	8%	0%
EU27	8%	8.00%	0%	0%	0%	8%	0%	0%	8%	-

Remarks: Above rates are average tariff and there may be minor variation for exact HS codes. These tariffs are applicable only if imported fabrics are meant for domestic consumption

**Average Tariff rates (%) on import of cotton madeups in different markets**

Exporting Countries	Importing Countries								
	EU27+ UK	USA	UAE	Canada	Japan	S. Korea	Mexico	Russia	Australia
China	12	6 to 14.9	5	18	4.5 to 9.1	5.2	20 to 25	3.8 to 15	0
India	9.6	6 to 14.9	5	18	0	0	20 to 25	3.8 to 15	5
Pakistan	0	6 to 14.9	5	18	0 to 9.1	13	20 to 25	3.8 to 15	5
Bangladesh	0	6 to 14.9	5	0	0	0	20 to 25	3.8 to 15	0
Vietnam	9.6	6 to 14.9	5	0	0	0	20 to 25	3.8 to 9.1	0
Mexico	0	0	5	0	0	13	-	3.8 to 15	5
Thailand	12	6 to 14.9	5	18	0	0	20 to 25	3.8 to 15	0
Turkey	0	6 to 14.9	5	18	0 to 9.1	0	20 to 25	3.8 to 15	5
Taiwan	12	6 to 14.9	5	18	4.5 to 9.1	13	20 to 25	3.8 to 15	5
S Korea	0	0	5	0	4.5 to 9.1	-	20 to 25	3.8 to 15	0

Source: Global Market Access | :: TEXPROCIL ::



## TRADE NOTIFICATION

## TEXPROCIL MEMBERSHIP SATISFACTION SURVEY

Dear Member,

Kindly fill in your complete information below and respond to the questions below by tick (✓) marking appropriate response in the space provided or with suggestions in brief wherever necessary. We value your association with us and prompt feedback.

### COMPANY INFORMATION

Name of the Company	:	
Contact Person & Designation	:	
TEXPROCIL Membership (RCMC) No.	:	
Email Address & Website	:	

1) Kindly rate the following services offered by Texprocil on rating of 1 to 5. in order to serve you still better.\*

1= Excellent, 2=Good, 3 = Satisfactory, 4 = Needs Improvement, 5 = Not Availed (N.A.)

Membership	Rate Here	Trade Development	Rate Here	Trade Promotion	Rate Here	Trade Services	Rate Here	Trade Intelligence	Rate Here
Procedure for New Membership	<input type="text"/>	Publication: E-Newsletter	<input type="text"/>	Intl. Fairs & Events	<input type="text"/>	Certificate of Origin	<input type="text"/>	Interactive Website	<input type="text"/>
Membership Renewal	<input type="text"/>	E-serve	<input type="text"/>	Seminars & Workshops	<input type="text"/>	Grievance Redressal Services	<input type="text"/>	E-News Clippings	<input type="text"/>
RCMC Amendment	<input type="text"/>	Circulation Trade Enquiries/ Award	<input type="text"/>	MDA/MAI Schemes	<input type="text"/>	Information on Exim policy/ Amendment DBK	<input type="text"/>	Information Disseminated	<input type="text"/>

2) a. Are you generally satisfied with the services actively availed by your company and marked above? **Tick (✓)**

YES

NO

b. If you have replied 'no' above, please suggest how the Council can improve the services (use additional sheet if required)

**Suggestions:**

3) How is your company benefitting from the Exhibitions / BSMs being organized by the Council? **Tick (✓)**

Accessing new Markets

Generating additional business

*Others (Pls. Specify):*

Making new Contacts (Trade Enquiries)

Any Others

4) How is your company benefitting from the Export Facilitation services being provided by the Council?

Information on Export Policy / Procedures

Responses to various EXIM queries

*Others (Pls. Specify):*

Redressal of Trade related grievances

Any Others

5) Have you recommended TEXPROCIL Membership to other companies? **Tick (✓)**

YES

NO

6) Do you have any other suggestions to offer regarding TEXPROCIL Member Services? (use additional sheet if required)

**Suggestions:**

\*Kindly ignore this feedback form, if you have already responded.

## TRADE NOTIFICATION

## TEXPROCIL MEMBERSHIP Annual Renewal Subscription

### (A) Renewal of Membership - Annual Subscription Fees

For Renewal of Membership, an Annual Membership fee is to be paid.

Details of Annual Renewal Subscription Fees are as follows:

Type of Membership	Amount (Rs.)	GST @ 18%	Total Amount (Rs.)
Member (with Voting Right)	11000/-	1980/-	12980/-
Registered Textile Exporter	6000/-	1080/-	7080/-

### (B) Payment of Renewal Subscription Fees

Payment of Renewal Subscription fee for the year 2020-2021 can be made online.

Bank details for online payment are as follows:

Account Name	The Cotton Textiles Export Promotion Council
Bank	Bank of Baroda
Branch	Opera House Branch, Mumbai-400004
Account No.	04090200000927
IFSC Code	BARB00PERAH (Fifth character is zero)

After payment, send the details of online payment by Email in the following format on the following email ID : [smita@texprocil.org](mailto:smita@texprocil.org).

Company Name	
Registration No.	
GST No.	
UTR No.	
Date of Transaction	
Name of Bank	
Amount of Transfer	
WhatsApp No.	(To receive handy and timely information from TEXPROCIL)

Also send a scanned copy of Bank Payment Advice by email on the Email ID : [smita@texprocil.org](mailto:smita@texprocil.org)

Immediately after receiving the Payment details, the membership will be renewed.

### (C) Renewal of RCMC that has expired

We are glad to inform you that the Council has put in place an online system for renewal of Registration-Cum-Membership Certificate (RCMC). Renewal of RCMCs can be made online and after processing, the Renewed RCMC will be available to you online. The Original renewed RCMCs will be sent to you once our office opens and starts functioning after the lockdown.

Steps to be followed:

Upload self-attested scanned copies of the following documents online on TEXPROCIL's website ( [www.texprocil.org](http://www.texprocil.org) ) through Member login and send a renewal request by Email on the Email ID [smita@texprocil.org](mailto:smita@texprocil.org) ( In case the RCMC has expired ) :

- [1] Copy of your Import-Exporter Code (IEC)
- [2] In case of Manufacturer Exporter, a copy of Manufacturing Licence
- [3] In case of changes in Partners, a copy of revised deed of partnership
- [4] In case of changes in Directors, a copy of DIR-12 or Board Resolution for those who have resigned or newly appointed.
- [5] Copy of old RCMC
- [6] Copy of GST Registration Certificate (if not submitted earlier)
- [7] Payment advice of Annual Subscription for the year 2020-2021

Or

Alternatively, send self-attested scanned copies of the above documents by Email on the Email ID [smita@texprocil.org](mailto:smita@texprocil.org)

**:: TEXPROCIL ::**