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Indian Cottons, Global Reach !

TEXPROCIL E NEWSLETTER

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

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GOVT. MEETINGS

TEXPROCIL DELEGATION MEETS MOS - Agriculture in New Delhi

Shri Purushottam Rupalaji, MOS, Agriculture (3rd from Left) being greeted by Mr. Manoj Patodia, Chairman, Texprocil (2nd from Left) & Texprocil Delegation (L-R) Mr. Neelabh Dalmia, Mr. Amit Ruparelia, Dr. Siddhartha Rajagopal, ED, TEXPROCIL & Mr. K. Raju, Reg. Officer in New Delhi on 09.02.2021.

CHAIRMAN'S MESSAGE

WELCOME TO TEXPROCIL

Indian Cottons, Global Reach !

Dear Friends,

The textile and apparel sector continues to be tested as an industry even as the new mutations of virus make appearance in some parts of the country and across the globe as well. This is not only threatening the loss of lives but has also led to multiple challenges in the way of trade growth. The country's strong raw material base, the indomitable spirit of textile players and commencement of vaccination drive did offer some respite. Yet issues such as non-availability of containers, uncertainty on RoDTEP rates, rising price of raw materials are all affecting future growth prospects.

At the same time the government has been looking at medium and long term oriented growth. In this connection the PLI and MITRA schemes are expected to provide the necessary impetus for a quantum jump in our export growth.

Meeting with Hon'ble Minister of Textiles

Smt. Smriti Zubin Irani, Hon'ble Minister of Textiles and Woman & Child Development chaired a meeting with Industry on 1st March 2021. The meeting covered topics including PLI, Mega Textiles Park and National Technical Textiles Mission. I along with the Council's Executive Director attended this meeting. The meeting also discussed issues concerning HS Lines of Technical Textiles of Cotton and MMF that could be covered under the PLI Scheme.

As a follow-up to the meeting, the Council has sent suggestions to broad base the PLI scheme for the textile sector. These include considering a reduction in turnover growth required under the scheme for availing incentives under the scheme from the proposed 50% to 15 to 20% p.a.; for the base year in the scheme considering the turnover in the Financial Years 2019-20 or 2020-21 whichever is high and expanding the

CHAIRMAN'S MESSAGE

Continued from Page 1

product coverage to include cotton-based technical textiles and fabrics, carpets and quilts (bed in a bag).

The Council has also submitted a proposed list of specific textile products to be included under the scheme.

Production Linked Incentive scheme

The Production Linked Incentive (PLI) scheme, as is known, has been introduced in 10 selected sectors including Textiles under the 'Aatmanirbhar Bharat' flagship program for enhancing India's manufacturing capabilities and encouraging investments. The underlying idea of the PLI scheme is to provide focussed incentive to specified sectors rather than giving open-ended support to all products.

The importance of the scheme can be gauged from the fact that Hon'ble Prime Minister of India found time to deliver an Inaugural Address at a Special Webinar organised on the PLI scheme by the Department of Industry and Internal Trade (DPIP) and NITI Aayog, on 5th March 2021 through video conferencing. The Hon'ble Prime Minister stressed the importance of the scheme in strengthening the manufacturing base in the country and generating large scale employment.

The webinar made some key recommendations relating to the PLI Scheme in the Textile sector that included:

- ➢ Align the envisioned 7 Mega Investment Textile Raw Material and Apparel (MITRA) Parks with the PLI Scheme.
- ➢ Focus at least 2 MITRA parks on ESG (Environmental, Social and Governance) goals.
- ➢ Consider offering relaxation in the investment and incremental turnover.
- ➢ Create an India specific sustainable index.
- ➢ Resolve the inverted duty structure in MMF value chain.
- ➢ Consider relaxation in the targets to be achieved under the scheme.

The Council has also recommended for relaxation in the turnover growth required under the scheme from 50% to 15-20% p.a. as 50% growth is impossible to achieve. We are hopeful that our suggestions will be considered positively so that the scheme is broad based for availment by more stakeholders in the textile sector.

Focus on overseas markets

With an aim to boost exports to NAFTA Countries i.e., USA, Canada and Mexico, a virtual meeting was held on 2nd March, 2021 with EPCs under the chairmanship of Shri Sanjay Chadha, Additional Secretary, Department of Commerce. The meeting also held discussions on the domestic and overseas constraints coming in the way of enhancing exports to NAFTA Countries and ways to initiate suitable measures for addressing them.

The Council attended the meeting and pointed out that the NAFTA region is important as it accounts for approx. 28% of cotton textile exports from India. Similarly, the USA is the single largest market with approx. US$ 2.80 billion worth of cotton textiles export from India, mostly home textiles. However, tariff in Brazil is approx. 35% on fabrics and in Canada it is 17% on home textiles, because of which it is difficult to increase export from India. The Council requested the government to address the tariff issue with both these countries and hopes that the same is suitably addressed.

Government Representations

The Council continued to draw attention of the government towards the various representations received from our members pointing out the difficulties faced by them like acute shortage of containers, RoDTEP rates and rising prices of raw material

i) Shortage of Containers - The problem of acute shortage of containers continues to adversely affect exports. Triggered by lower levels of imports, the container shortage is leading exporters to fail in maintaining timely shipment schedules. There has also been a steep rise in the freight rates which has further aggravated the problem. The Council has alerted the Government with regard to the "opportunity loss" that the delays in shipment are causing thereby severely affecting export growth.

ii) RODTEP Rates- The RoDTEP Scheme has been made effective from 1st January, 2021. However, the rates are yet to be notified and may take some more time creating huge uncertainty for the exporters. The Council has appealed to the government to continue with the RoSCTL rates for cotton madeups under the RoDTEP scheme (since the RoSCTL scheme is subsumed under RoDTEP scheme).

We have argued that as the RODTEP Scheme seeks to rebate duties & levies similar, if not identical to the Central & State level taxes rebated earlier under the ROSCTL Scheme, the rates should be the same and no reduction should be done under the new rates proposed under the RODTEP Scheme for madeups. This will also help in sustaining the level of exports of madeups across countries and in turn will also lead to substantial employment generation. We have also requested that the RODTEP rates should be extended to all textile products across the value chain.

iii) Raw Material Prices - As the textile sector began operating at near optimum capacity, demand for cotton and yarn increased sharply as did the demand for fabrics/made-ups/garments. Consequently yarn prices have also increased since the beginning of this year, riding primarily on rise in cotton prices, besides domestic and export demand. However, it is exceedingly difficult to establish any direct correlation between the price rise and production levels, stock position, export growth or consumption for mill use. Data on exports of yarn shows that they have increased by about 4.4% in quantity and declined by (-) 4.3% in value during April-January, 2021 compared to the previous year same period. At this stage it is observed that exports of cotton yarn are range bound and have not "spiked" and hence are not a major contributory factor to the rising prices.

Way forward

Friends, as is well-known, the textile sector in the country has been instrumental in promoting exports and creating employment opportunities. Also, the government's support, through various reforms being undertaken, clearly spell out their intention to remove the disabilities and enable the sector to achieve size and scale so as to become globally competitive.

It is hoped that the industry will rise to the occasion and take steps in terms of concrete investments to make the much needed leap of faith.

Manoj Kumar Patodia
Chairman

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COMMODITY 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.

Demand for cotton and yarn seems to be higher than the supply worldwide, thereby leading to a strong rally in prices.

✦✦ KEY TRENDS TO WATCH ✦✦

◆ Overall growth in cotton yarn exports ◆ Increase in home textiles exports fuels consumption growth of yarn ◆ China's export of T&A to the USA has shown decline but seeing growth in the EU

Kindly send your feedback on email: ravi@texprocil.org

Overall export of cotton yarn for the period April-January 2020 – 21 has grown by 4.4% in quantity terms over the corresponding period in the previous year. However, there was a 17.6% decline in cotton yarn exports in the month of January 2021 compared to January 2020. On an average, 90 Million Kgs of cotton yarn is being exported per month and there is no significant change post the lockdown period in the month on month export figures. Average export of cotton made-ups during the year 2019 was approximately US$ 412 Million per month, which has gone up to an average of US$ 506 million per month for the period September – December 2020. Month on month Increase in export of home textiles is helping robust demand for cotton yarn in the domestic market.

Recent news in the media indicating possibility of Pakistan allowing cotton and yarn imports from India via land route is leading to mixed reactions from the trade. There is an increasing demand for fine count yarns in Pakistan for further value addition and export of finished products. Pakistan is the 5th largest importer of cotton in the world. We sincerely hope revival of demand from Pakistan is not a trigger for further increase prices in the domestic market for cotton and for fine count yarns.

The recently concluded India-Mauritius Comprehensive Economic Cooperation and Partnership Agreement (CECPA) will be ratified by both the countries and come into force soon. This agreement allows duty free import of 7.5 million pieces of garments from Mauritius to India and duty free access for made-ups / home textiles from India to Mauritius. Hopefully, demand for cotton yarn in Mauritius will increase in view of possible export of a large volume of knitwear. Mauritius imports approx. US$ 28 million worth of home textiles per year, of which import from India is valued at approx US$ 2 million, thereby offering a greater scope for increasing export of home textiles and in turn higher demand for yarn from the domestic market.

It is reported that export orders for home textiles and apparel products in China are increasing in recent weeks. Even though export of textiles and apparel from China to USA has shown a declining trend for the past one year, there is a positive growth in export to EU. According to reports from China, the Chinese textile industry is anticipating that there may not be significant change in the prices of yarn over the next 3 to 4 months in China as well as in other supplying countries. With this assumption demand in China is stable for both ring spun as well as open end yarns. Price parity between yarn imported from India vis-a-vis Vietnam and Pakistan has narrowed down at present compared to period prior to the holidays in February. Chinese spinners are holding only four days of yarn inventory, which clearly indicates surging demand in the Chinese domestic market. Price increase is seen in Viscose and other MMF yarns as well and the increase has been at a steeper rate compared to cotton yarn prices over the past six months.

In the year 2020, China imported 2,158 Mn Kgs of cotton from all sources, of which share of India was 253 million kgs, the highest level in the past five years. According to market reports, Chinese imports of cotton are set to increase in the current year.

In the present market conditions, demand for cotton and yarn seems to be higher than the supply worldwide, thereby leading to a strong rally in prices. As more production capacities come on stream and as pipe-line filling has already happened we can expect prices to stabilise in the short run.

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TEXPROCIL E-NEWSLETTER

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COMMODITY 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.

Technology push is required for the Fabric segment in India to be globally competitive!

While India leads in cotton yarn exports, it has been a very marginal player when it comes to cotton fabric in world exports. Whether Cotton or MMFs, China reigns supreme in fabrics leaving India with just a small share of fabrics. This comparison suggests that India is not able to scale up the value chain significantly enough to meet the global demand despite being the largest producer and exporter of cotton yarn.

In India, out of its almost 25 lakhs weaving capacity, the share of modern looms is just about 4%. This indicates a low degree of modernisation in the Indian weaving industry. Almost 60% of total cloth production in the country comes through powerlooms. India currently has almost triple the shuttle looms as compared to China. However, in China, modern shuttleless looms are almost triple as compared to 1.2 to 1.4 lakhs in India. This indicates the huge productivity gap India must bridge to become competitive in the global markets.

Despite having one of the largest installed production bases in the world in the weaving sector, India lacks competitiveness due to technology obsolescence along with low productivity and quality levels. In terms of technology adoption in the weaving sector, India has only 2% share in global shuttleless looms (i.e. modern looms) installed capacity. The cost of production in India also goes up due to poor technology levels and low scale of operations as 95% of the weaving sector in India is unorganised, based in the small scale sector and largely comprising MSME units.

Major shuttleless weaving capacity addition is taking place in the decentralized sector and not in the Mills segment which results in fragmented and constrained capacity creation that is incapable of catering to export customers with regard to volumes and timelines. Most of the total fabric production comes from largely unorganised mills in the power loom and knitting sector dominated by small-scale enterprises, which have challenges such as inadequate know-how, low focus on research, limited innovation in new product development and low technology upgradation. India also lacks the presence of large fabric manufacturers when compared to China and the US. Also with phasing out of capital subsidy support to capacity creation in weaving, there has been a slowdown in new looms addition compared to neighbouring countries.

That apart, India also lacks in terms of favourable market access which has helped the neighbouring countries like Bangladesh, Pakistan and Sri Lanka to increase their exports with the help of FTAs with major importing countries as well as regions in the world. We can fairly conclude that in terms of global competitiveness, the fabric stage of the value chain in the Indian textile and clothing sector is relatively a weak link with the wet processing capacity creation stuck between financial, regulatory, environmental and statutory quagmire.

The vision to position India as a fully integrated and globally competitive manufacturing hub cannot be achieved unless flawless and processed wider fabric is available. In order to produce international quality with highest productivity, investment should be done in the latest generation shuttleless air-jet and rapier looms available in the global market.

✦✦ KEY HIGHLIGHTS ✦✦

- With the phasing out of capital subsidy support for capacity creation in weaving, there has been a slowdown in the new looms addition compared to neighbouring countries.
- Major shuttleless weaving capacity addition is taking place in the decentralized sector and not in the Mills segment resulting in fragmented and constrained capacity creation which is incapable of catering to export customers with regard to volumes and timelines.
- The biggest bottleneck however is the fabric processing as the wet processing capacity creation remains stuck between financial, regulatory, environmental and statutory quagmire.

The post-COVID world has also opened avenues for health and hygiene segments of fabrics with special fibres and finishes that depict properties useful to safeguard against the harmful virus. While quite a few technical capacities have been imported in the country a lot more needs to be done to help the value added fabrics produced in India to meet global standards and acceptance by the customers.

On the policy front, the government has recently announced the production-linked incentive (PLI) scheme and the mega integrated textile region and apparel (MITRA) park scheme eyeing big-ticket investments in the textile sector. The need of the hour, for India to become a global fabric producer, is to invest a lot more in weaving technology to improve quality and productivity and make the players competitive in the global market.

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COMMODITY UPDATE

SPRING SUMMER 2021
HOME & INTERIORS TREND

HOME & INTERIORS

"Having spent a much higher proportion of our time at home last year, we'll see householders gaining much more of an understanding of how the design of their home makes them feel. Colour and pattern are both tools we'll be using to inject more joy into our daily lives."

Naomi Pollard, Head of Home & Interiors, Trend Bible

Spring Summer 2021 season preview provides an insight into the trends we can expect to see emerge over the coming months. The portrayed home trends foster a holistic sense of wellbeing; from incorporating art and calming rituals into the everyday, through to the smart home becoming as humane and sensorial as possible.

Welcome to Spring Summer 2021

The small things we do to preserve energy and bolster our physical and mental resilience will feel like huge acts of rebellion. From colour therapy to single tasking – emerging lifestyle and décor trends will focus on how we can become immune to stress and ill health. Bold and beautiful exotic design will again provide the distraction we need in a year where travel is unlikely and urban spaces will undergo a leisurely transformation as consumers' holiday at home once more.

La Belle Vie

Sun soaked / Relaxed & Slow / Nonchalant / Organic / Modern Rustic

Ease into Spring Summer 2021 with this modern, rustic story reminiscent of laidback retreats in Southern Provence.

In a world of multi-tasking and attention deficit, the art of focusing on a single act becomes precious. Adopting a more considered approach to living, householders design their homes accordingly, creating summer escapes for respite and focus.

This season colour variations and imperfections are cherished as consumers continue to favour handmade finishes. Baked and faded tones radiate the warm and relaxed flair of sun soaked days.

With a growing interest in organic design, sensual lines inform everything from surfaces to product direction this season. Curvy steam bent and scalloped shapes add a gentle feel to furniture design and home decor.

Colour Therapy

Aesthetic of Joy / Uplifting & Calming / Translucent / Interactive & Immersive / Soft & Smart

Tech fully supports wellbeing in this optimistic story.

Drawing inspiration from sensory exhibitions and the rising awareness of how colour and light affect mood, this trend responds to a desire to create a calm yet uplifting atmosphere as consumers seek holistic solutions for the home.

COMMODITY UPDATE

SPRING SUMMER 2021
HOME & INTERIORS TREND

A palette of sophisticated pastels is injected with soft pops of red-orange, tan and cassis tones radiating a playful yet grown up aesthetic of joy.

Tech appears soft and decoratively blends into the home in this trend. Rounded corners, pastel shades and textile inspired surfaces add a human touch to smart devices.

Richly coloured iridescent surfaces and generous colour blends are essential for this atmospheric trend. Joyful product design embraces colour coding for easy and fun navigation.

Gardens of Babylon

Abundant / Middle Eastern Oasis / Maximalist / Ornate & Intricate / Revitalising

This maximalist story embodies an oasis of greenery. The home becomes a vibrant palace, bursting with pattern and texture where abundance and equality for all are celebrated.

The Middle East, as an emerging design and cultural hotspot, provides rich inspiration for this trend. The combination of the region's dry arid landscapes, maximalist aesthetics and a new wave feminist movement creates an interesting dynamic for change and is inspiring designers all over the world.

This high summer story combines rich jewel tones with an array of lush greens and juicy hues. This palette is highly versatile allowing for a variety of vivid, bold and tonal colour combinations.

Ornate floral illustrations, silky shimmering textiles and elaborate geometric metalwork capture the spirit of abundance. Strong, confident women populate painterly illustrations and messaging supports equality for all and encourages living a fulfilling life.

Urban Retreat

Sculptural / Raw & Polished / Restrained / Nature in the City / Geometric Modern Rustic

A refined natural feel is evoked in this architecture inspired story for Spring Summer 2021.

As urbanisation continues across the globe, the role of cities and our place within them is being re-evaluated. Regional lockdowns and a move to home working in 2020 have accelerated this shift, leading to a demand for a better and more egalitarian quality of life in the city.

A pared back and earthy colour palette contrasts with brick red, deep green and charcoal black, supporting the urban yet natural look of this trend.

New and exciting materials bring the aesthetic qualities of Brutalist architecture into the modern age with a focus on sustainability.

Consumers appreciate the imperfect through natural material colouring and eco-friendly dyes. This chimes with the growing interest in living sustainably, where veganism begins to affect industries beyond food and fashion.

Source: www.trendbible.com

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COUNTRY UPDATE

India's trade in Textile & Clothing with North American region

Mr. N. Ravindranathan, Director, TEXPROCIL explores the immense potential for exports of Textiles & Clothing from India offered by North American Region

North American region is an important destination for export of Textiles & Clothing from India, accounting for 26.84 % of India's export in the year 2020. Of the total export of US$ 29.68 billion worth of T&C products exported from India in the year 2020, export to North America (USA, Mexico & Canada) accounted for US$ 7.97 billion.

In addition to direct export to USA, Canada and Mexico for domestic consumption, FTA agreement amongst these three countries also offer scope to increase export of yarn and fabrics from India for conversion and export finished products by utilizing relaxations in Country of Origin Rules with certain quantitative limits.

The North American Free Trade Agreement (NAFTA), modified to US-Mexico-Canada Agreement (USMCA) in the year 2019, was a three-country accord negotiated by the governments of Canada, Mexico, and the United States that entered into force in January 1994. NAFTA eliminated most tariffs on products traded between the three countries, with a major focus on liberalizing trade in agriculture, textiles, and automobile manufacturing. The deal also sought to protect intellectual property, establish dispute resolution mechanisms and through side agreements, implement labour and environmental safeguards.

NAFTA fundamentally reshaped North American economic relations, driving unprecedented integration between the developed economies of Canada and the United States & the developing economy of Mexico. Regional trade tripled in two decades under the agreement, and cross-border investment among the three countries also grew significantly.

In December 2019, the US government completed an updated version of the NAFTA pact with Canada and Mexico, now known as the U.S.-Mexico-Canada Agreement (USMCA).

Under the USMCA agreement, minimum wages in Mexico and rules of origin criteria were modified so as to encourage more and more usage of raw material manufactured within the region for conversion into value added products for duty free export to USA.

USMCA adopts the "yarn-forward" rules of origin. The "yarn-forward" rule of origin (RoO) means that fibres may be produced anywhere, but each component starting with the yarn used to make the apparel garments must be formed within the free trade area, i.e., by USMCA members. The "yarn-forward" rule sometimes is also called "triple transformation," as it requires that spinning of the yarn or thread, weaving or knitting of the fabric, and assembly of the final apparel garments all occur within the free trade area.

USMCA offers the duty-free treatment for apparel assembled in Mexico but using fabrics that are wholly formed and cut in the United States (commonly known as the 807A provision). However, when applying the rule, USMCA allows visible lining fabrics to be sourced from anywhere in the world, which is more liberal than NAFTA.

Tariff Preference Level (TPL) allows a certain quantity of textile and apparel goods (usually yarns, fabrics and cut pieces) from a third country (i.e., a country which is not a party to the agreement) to qualify for the benefits.

Tariff Preference Level (TPL) for USA Apparel imports under USMCA

Exporter	Product	TPL in Sq Mtr Equivalent
Mexico	Cotton/MMF apparel	45,000,000
Canada	Cotton/MMF Apparel	40,000,000
Source: USTR		

Under TPL, USA allows 45 million sq mtrs equivalent (SME) of apparel imports from Mexico and 40 Mn SME from Canada per year, duty free irrespective of country of origin of yarn and fabric content in the product.

Tariff Preference Level (TPL) for Canada Apparel imports under USMCA

Exporter	Product	TPL in Sq Mtr Equivalent
Mexico	Cotton/MMF apparel	6,000,000
USA	Cotton/MMF Apparel	20,000,000
Source : USTR		

Under TPL, Canada allows 6 million SME of apparel imports from Mexico and 20 Mn SME from USA per year, duty free irrespective of country of origin of yarn and fabric content in the product.

Commercial availability/short supply list

USMCA allows textile inputs (fibres, yarns, and fabrics) that are determined not available in commercial quantity in the FTA region to be sourced from anywhere in the world and the finished apparel garments can still enjoy the duty-free treatment provided by the agreement. Short supply product will be determined based on individual applications to US authorities.

Retail chain stores and importers of finished products such as apparel prefer using TPL route rather than 'short supply' route because of ease of operation.

COUNTRY UPDATE

India's trade in Textile & Clothing with North American region

Import of T&C into US from Mexico & Canada (Mn US$)		
Description	**Import from Mexico**	**Import from Canada**
Total import	4995	1567
Import under FTA	(yarn/fabric sourced within USMCA)	
	1780	552
Import under TPL	(yarn and fabric from any country)	
	88	140

There is a vast scope to increase export to North American countries by tying up with garment exporters in Mexico & Canada and explore opportunities in increasing export of yarn and fabrics to these two countries for conversion and re-export to USA under TPL route.

Import of Textiles & Clothing into North America & share of India									
Product group	**Import into USA (US$ Mn)**			**Import into Canada (US$ Mn)**			**Import into Mexica (US$ Mn)**		
January - December	**2019**	**2020**	**% Change**	**2019**	**2020**	**% Change**	**2019**	**2020**	**% Change**
Total import of T&C from all sources	115,377	112,293	-2.67%	14,748	15,110	2.45%	7,339	5,600	-23.70%
Import of T&C from India	8,432	7,236	-14.18%	645	553	-14.19%	269	176	-34.46%
% Share of India	7.3%	6.4%		4.4%	3.7%		3.7%	3.1%	
Import of Textile from all sources	30,650	43,653	42.42%	4,639	6,437	38.75%	4,276	3,229	-24.50%
Import from India	4,343	4,166	-4.08%	327	330	1.08%	104	60	-42.52%
% Share of India	14.2%	9.5%		7.0%	5.1%		2.4%	1.8%	
Import of Cotton Textiles from all sources	14,722	28,234	91.79%	1,498	3,490	132.92%	1,621	1,149	-29.13%
Import of cotton textiles from India	2,799	2,684	-4.11%	168	180	7.03%	43	32	-27.12%
% Share of India	19.0%	9.5%		11.2%	5.1%		2.7%	2.8%	

From the data Table, it may be noted that, in the year 2020, USA imported US$ 112 billion worth of T&C, of which share of India was US$ 7.24 billion (6.4%). Share of India in import of T&C into Canada was 3.7% and Mexico 3.1%.

As far as cotton textile trade is concerned, import from India into USA has declined by -4.11% in the year 2020 compared to the previous year. During this comparative period, import from India to Canada grew by 7.03% and to Mexico declined by -27.12%.

Summary

- There is a vast scope to increase lining fabrics from India to the North American countries as there is no restriction in country of origin rules while exporting finished products between the three countries.
- Tariff in Mexico is approx. 10% on fabrics and minimum import price / reference price on import of fabrics into Mexico is major trade barrier as it involves a lot of documentation by the importers.
- Import tariff on finished products of T&C in Canada is approx. 17%. By doing outward processing in Mexico and exporting to Canada, there is a possibility for avoiding tariff.
- Mexico offers a large scope for supplying fabrics for conversion and re-export to Canada and USA.

Source: OTEXA, USTR, GTA

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To obtain more details on North American Region, kindly get in touch with Mr. N. Ravindranathan, Director, TEXPROCIL on email : ravi@texprocil.org

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POLICY TALKS

Policy & Procedures Update

Changes In GST Law and Procedures

By A. Ravi Kumar, Joint Director, TEXPROCIL

The Government has taken various initiatives for trade facilitation and "Ease of Doing Business" under GST in 2020-21. The Government has also taken steps under GST and has imposed some stringent conditions primarily with the objective of curbing GST evasion by fake invoicing.

E- Invoicing

The Government has introduced E-Invoicing for B2B transactions with effect from 01.10.2020 for registered taxpayers having turnover above Rs.500 crore in the preceding financial year. The facility has been implemented for registered taxpayers above Rs.100 crore with effect from 01.01.2021. E-Invoicing would help in seamless flow of credit and invoice matching as envisaged under the GST regime. Further, it would help in real time updation of data on the GSTN system and, thereby, reducing the time taken significantly in filing the returns.

Auto Generation of Return

To make the return filing process more user-friendly, Government has introduced auto-population of outward supplies of a tax payer from Form GSTR-1 to the GSTR-3B return and auto-generated Input Tax Credit (ITC) statement Form GSTR-2B in a PDF format for filing monthly GSTR-3B return for a tax payer. Further, the facility of auto –population of values in GSTR-3B shall be introduced soon to make the process more friendly to the stakeholders and improve its effectiveness.

QRMP

The Government has notified the QRMP scheme (Quarterly Return Monthly Payment Scheme) as a trade facilitation measure and in order to further ease the process of doing business. Under this scheme, registered tax payers having an aggregate turnover of upto Rs.5 crore in a Financial Year are allowed to furnish return on a quarterly basis along with monthly payment of tax. This will reduce compliance burden considerably for such tax payers and result in significant saving of time and cost. This facility is available from January 1, 2021. This will benefit almost 89% of tax base and would reduce the compliance burden. Total number of returns required to be furnished by such person would be reduced from 24 (12 GSTR-1 and 12 GSTR-3B) to 8 (4 GSTR-1 and 4 GSTR-3B) per year.

Filing of Nil Returns through SMS

In a significant move towards tax payer facilitation, the Government has allowed filing of Nil GST monthly return in Form GSTR-3B and Form GSTR-1 through SMS improving the ease of GST compliance for over 22 lakh registered tax payers. Now, tax payers with Nil tax liability need not log on to the GST portal.

Restriction on use of ITC to discharge GST liability

On December 24, 2020, the Government notified that businesses with monthly turnover of over Rs.50 lakh would have to mandatorily pay at least on per cent of their GST liability in cash. This move by the Finance Ministry is mainly to curb GST evasion by fake invoicing.

CBIC has introduced Rule 86B in the GST Rules, applicable from January 1, 2021 which restricts use of Input Tax Credit for discharging GST liability to 99%. This restriction would not be applicable in those cases where the Managing Director or any Partner had paid more than Rs.1 lakh as income tax or the registered person had received a refund amount of more than Rs. 1 lakh in the preceding financial year on account of unutilized Input Tax Credit .

Non-filing of GSTR-3B will lead to blockade of GSTR-1

CBIC has amended the GST rules restricting filing of outward supply details in GSTR-1 for business that have not paid tax for the past periods by filing GSTR-3B . So far, non-filing of GSTR-3B resulted in blockade of E-Way Bill but it would now result in GSTR-1 blockade as well.

Physical verification of business premises for GST Registrations

CBIC has also notified authentication of Aadhaar number or physical verification of business premises for the purpose of obtaining GST registration. This move is aimed at checking fraudulent registrations just for the purpose of passing on ITC.

Extension in the validity of E-Way Bills

The validity of E-Way Bill have now been extended. E-Way Bill would now be valid for one day for every 200 kms of travel as against 100 kms earlier.

Extension of due date for filing Annual Returns under GST

The Government has extended the due date for filing GSTR-9 (Annual Returns) and GSTR-9C (Reconciliation and Audit Statements) for the Financial Year 2019-20 from February 28, 2021 to March 31, 2021.

:: TEXPROCIL ::

Avail of more detailed information on

EXIM POLICY @ TEXPROCIL

Please Contact: GREIVANCE REDRESSAL CELL

email: ravikumar@texprocil.org

POLICY TALKS

Policy & Procedures Update

Extension of due date for filing Annual Returns under GST

The Government has extended the due date for filing GSTR-9 (Annual Returns) and GSTR-9C (Reconciliation and Audit Statements) for the Financial Year 2019-20 from February 28, 2021 to March 31, 2021 vide CBIC Notification No. 04/2021 – Central Tax dated 28.2.2021.

Advisory on GSTR -9 and GSTR- 9C issued by the GSTN

(i) Advisory on Reconciliation Statement (GSTR-9C)

Reconciliation statement to be filed in Form GSTR-9C requires the tax rate wise declaration of transactions for the concerned financial year. In the said form, tax amount pertaining to tax rates 1%, 1.5% and 7.5% in section III (table 9 and 11) and section V may be made in row/ under label 'Others' of the said tables, wherever applicable.

(ii) Advisory on Annual Return (GSTR-9)

The taxpayers are advised to ensure that values are reported upto two decimal places in the GSTR-9 offline utility. The error "Error! Invalid Summary payload" after uploading the JSON created from the Offline Utility of GSTR-9 is reported due to reporting values upto three decimal places instead of two decimals.

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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 Chinthal, IT Officer/ Mr. Rajesh Satam, Joint Director on email: rakesh@texprocil.org / rajesh@texprocil.org.

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

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

Regards,

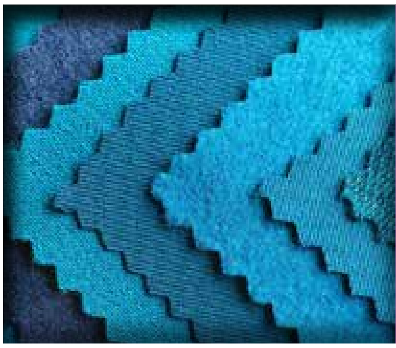
Dr. Siddhartha Rajagopal
Executive Director

:: TEXPROCIL ::

DESIGN CORNER

Inspecting the Fabric Quality

Defects - Causes & Prevention (Part 1)



As a fabric supplier, one thing may likely come to your mind: **the anticipation of customer satisfaction as they buy an item from your product line.**

Here lies the problem. The "quality" fabric from your factory must meet the required standards. In fact, a lot of problems, countless defects ranging from drop stitches to color shading variation may occur during production. The scale of defects makes it clear that the end user - for producing finished goods - will have to cut around the issues to use the fabric, wasting material in the process.

Where do these kinds of fabric defects come from? And how to prevent them from negatively impacting fabric quality?

The solution lies in adopting universally accepted industry standard systems available for evaluating fabric quality in the inspection industry. These systems assign penalty points to a roll of fabric according to defect size, quality and significance. It is also essential to understand the different types of fabric defects to look for before deciding to use one of these systems.

Below enlisted is the first set of the common fabric defects (to be continued in part 2 of article in the next issue) for the information of our avid readers.

1. **HORIZONTAL LINES** - This fabric defect is defined by irregular lines that run from side to side.

Causes: Faults in the bobbin (the barrel used to hold yarn in place), Irregular thread tension

Prevention: Preventing the appearance of horizontal lines in fabric is quite straightforward. Regularly replace the bobbin and frequently check thread tension and positioning.

2. **SHADE VARIATION** - One of the more obvious visual defects that can be found on raw textiles, shade variation is defined by a difference in depth of shade and color from roll to roll or piece to piece.

Causes: Mixing of fabrics used in production, Variations in the production process with regard to time and speed, Improper cutting, bundling and/or numbering, Unequal fabric stretching

Prevention: Using the same base material and set of parameters for each production lot can effectively prevent shade variation. In a factory that manufactures raw textiles, it's critical to ensure workers are only combining garments of the same color and not taking shortcuts when cutting and bundling. Properly numbering textile types prevents mistakenly combining cuts that vary in shade.

3. **DIRT/STAINS** - Stains are fairly common among dyed textiles and are defined as spots or patches of differing color. Textiles are never truly safe from stains because they can occur anytime during or after production if they're not kept in an area with adequate protection.

Causes: Stains can appear on fabrics from just about any source. Dirt from the factory floor, oil from machinery and dyes are all known sources. Stains are relatively easy to identify and prevent so long as suppliers are vigilant about fabric quality.

Prevention: Stains during production can be prevented by regularly cleaning production machines and equipment to ensure no random oils, grease or dyes make their way onto the textile. Wrapping the finished rolls of fabric in plastic and storing them in a separate area away from the dying area can help avoid post-production stains.

DESIGN CORNER

Inspecting the Fabric Quality

Defects - Causes & Prevention (Part 1)

4. **UNEVEN DYEING/PRINTING/DYE MARKS** - Dye marks are irregular patches on the surface of raw textiles.

Causes: Low quality base fabric, improper levelling agents, incorrect pH in the production process, Dye machine entanglement

Prevention: Ensuring there are no initial problems with the base fabric prior to stitching can help prevent dye marks. Any issues missed will be present in later production processes. Other preventative measures include maintaining the correct pH level, using an appropriate dying agent and using a backup power generator to ensure production machines don't shut down during use.

5. **DROP STITCHES** - One of the most common quality issues found in raw textiles, drop stitches are holes or missed stitches that appear randomly in the fabric.

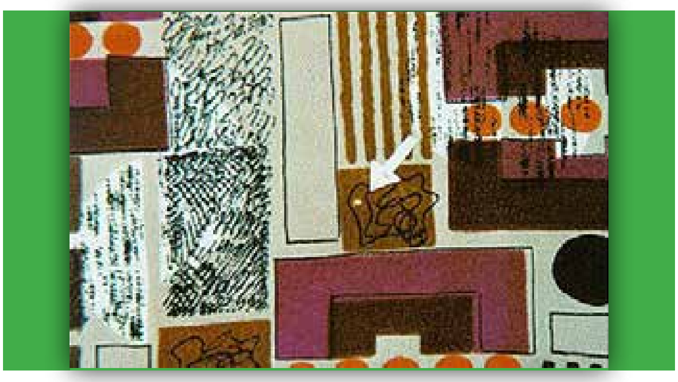
Causes: Incorrect set-up of yarn carriers, Slubs and knots, Yarn overfeeding or underfeeding, Loose stitching during the production process

Prevention: Checking the yarn carrier and any other machines to verify they're set to the right tension during production can prevent drop stitches. One can minimize the occurrence of drop stitching in the fabric or textile by regulating the yarn feed rate. Resetting the pattern chain can fix this issue.

6. MISPRINTING, OFF PRINTING OR ABSENCE OF PRINTING - Misprint defects are only relevant to printed fabrics. Misprint is when the print of the fabric does not match the specified design.

   This is usually displayed in one of the following ways: Colors and/or patterns are completely or partially missing (and/or) Colors and patterns are incorrectly positioned relative to each other

Causes: fabric defects, Wrong dyeing recipe, Wrong levelling agent, Incorrect dye combinations in lots, Improper scouring



of grey fabric, Implementing uniform dyeing, levelling and scouring processes can help prevent misprinting.

Prevention: When sourcing a printed fabric, make sure to provide clear specifications regarding the colors and patterns of the ordered printed fabric to the factory. Consider providing pantone color numbers and design files as a guide for the supplier.

7. **CREASE MARKS -** A crease mark is a visible deformation in fabric. A crease mark differs from a crease streak, as it's unlikely to appear for an entire roll. Rather, it appears in just one spot on the fabric. If final pressing cannot restore fabric to the original condition, a crease mark will be left on the final product.

   Discoloration can also be a problem associated with this fabric defect. Crease marks often happen when fabric passes through squeeze rollers in the dyeing process. Creasing is inevitable as fabric is fed through machines in rope form. But if properly handled, crease marks should not be permanent.

Causes: Inadequate preparation, relaxation or bulking of fabric, Poor quality of fabric: a tight construction, high twist yarns or dense weight, Poor suitability of machine: not moving folds properly, Incorrect loading of fabric into machine, resulting in twisted or knotted rope, excessively rapid heating or cooling rates

Prevention: Along with rectifying these issues, using anti-crease agents during the scouring process prior to dyeing can help prevent crease marks.

DESIGN CORNER

Inspecting the Fabric Quality

Defects - Causes & Prevention (Part 1)

8. **BARRE** - A barre is an unintentional, repetitive visual pattern of continuous bars and stripes. Barre will typically appear as a horizontal streak of light or dark bars running the width of the fabric. The bars must appear in a repetitive pattern to be considered barre. Barre is typically found parallel to the filling of woven fabric or to the courses of circular knit fabric. Barre is usually not detected until after the processing of fabric at the end of production.

Causes: Barre is a result of physical, optical or dye differences in yarns or geometric differences in fabric structure. Any combination of these differences can cause this fabric defect.

Prevention: Like many fabric defects, it's easier to prevent barre than to try and rectify it after production. Consistency in raw material organization and labeling can help prevent mix-ups leading to barre, as well as continual equipment maintenance. Following a First-In-First-Out (FIFO) inventory system can help ensure consistent material flow and usage.

9. **NEPS/KNOTS** - Neps are small, tightly tangled knot-like masses of unorganized fibers that form a pinhead shape. These knots are usually comprised of dead or immature fibers.Neps can be categorized into three types: Biological, Mechanical and White speck neps.

Causes: Neps are caused when spools of yarn are tied together. This might be a result of: Accumulation of fly and fluff on machinery, Poor lint cleaning, Poor carding and incomplete removal of neps before processing

Prevention: To prevent neps and knots, ensure proper maintenance and cleaning of machinery and roller clearers. Neps can be removed through combing before processing, so early detection of neps is critical to preventing neps in finished fabrics.

10. **ABRASION MARKS** - An abrasion mark is a discolored area damaged by friction or rubbing. Abrasion marks are sometimes also referred to as chafe marks or bruised places.

Causes: Chafing or impact with a hard or rough surface usually causes abrasion marks. For instance, scratches on the breast beam of the loom might cause chafing. Abrasion resistance is the ability of a fabric to withstand surface wear and rubbing. Fiber, yarn and fabric properties and finishing processes are the main factors that determine abrasion resistance.

Prevention: Using fabrics that are more abrasion resistant can help reduce abrasion marks. Nylon is generally regarded as having the best abrasion resistance, followed by polyester.

CONCLUSION

Whether using fabric to produce inexpensive, promotional t-shirts or high-end furniture upholstery, a clear understanding of the various types of fabric defects will help to prevent them. Learning how to identify various fabric defects and their causes can help to ensure that the fabric quality meets the required standards.

Prior to production, consider setting a defect tolerance for fabric quality issues. Establishing a mutually agreed upon system or relying on a third-party inspection company for fabric inspection can limit potential disputes with the supplier down the line.. Investing the time and effort to rectify issues and prevent future fabric defects will ensure the product meets company and customer standards. ***(Source: Asia Quality Focus)***

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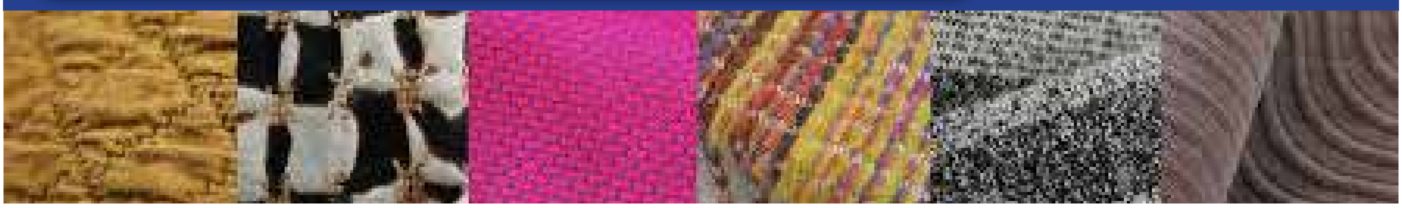
✦✦ FABRICS SUBCOMMITTEE @ TEXPROCIL ✦✦

◆ The Fabrics Subcommittee @ TEXPROCIL works towards development of ideas to propogate exports and discuss ways to remove impediments to trade growth.

Kindly send your feedback / suggestions on email: shailesh@texprocil.org



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%
EI 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		Publication: E-Newsletter		Intl. Fairs & Events		Certificate of Origin		Interactive Website	
Membership Renewal		E-serve		Seminars & Workshops		Grievance Redressal Services		E-News Clippings	
RCMC Amendment		Circulation Trade Enquiries/ Award		MDA/MAI Schemes		Information on Exim policy/ Amendment DBK		Information Disseminated	

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	BARB0OPERAH (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.

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

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) through Member login and send a renewal request by Email on the Email ID 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

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