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The newly appointed Secretary, Ministry of Textiles, Shri Ravi Capoor (right) being greeted by Dr. K V Srinivasan, Chairman, Texprocil (centre) along with Dr. Siddhartha Rajagopal, Executive Director, Texprocil (left) on 5th August 2019 in New Delhi.



Dear Friends,

Export performance started slowing down in the first quarter of the current fiscal, with continued slowdown

in world trade and growing protectionism. Based on the quick estimates released by DGCIS for the month of June 2019 an analysis by TEXPROCIL shows that exports of cotton textiles (yarn, fabric, madeups) have contracted by 19.7 per cent (year-on-year) to US\$ 792 million. In effect the cotton textile exports during the first quarter (April- June 2019) have declined by 10.7 per cent (year-on-year) to US\$ 2,521 million. In contrast during the previous year exports had achieved a level of US\$ 2,824 million during the first quarter (April- June 2018).

The decline in exports in June shows that even maintaining the current pace of growth is becoming difficult. The situation is quite serious and efforts must be made to reverse the trend, failing which many of the firms will face losses.

Declining Exports of Cotton Yarn

CHAIRMAN'S MESSAGE

An important reason for decline in overall exports of cotton textiles during the April – June 2019 period is the steep fall in exports of cotton yarn. Exports of cotton yarn in quantity terms have fallen by a steep 33%, i.e. from 338 Mn Kgs for the period in the previous year (same period) to 226 Mn Kgs in April – June 2019. The month on month decline from 90 Mn Kgs in April 2019 to 77 Mn Kgs in May to 59 Mn Kgs in June, is a matter of deep concern. In fact, the level of 59 Mn. Kgs is the lowest monthly export in the last five years.

The steep fall has been caused by a variety of reasons including decline in exports to leading export markets like China, Bangladesh, South Korea and the duty free access given for import of cotton yarn by China to countries like Pakistan and Vietnam from 1st April 2019.

The cotton yarn sector has been one of the pillars of the Indian textile industry and is also highly modernised and technology driven and also provides sustainable income to farmers, hence needs the full support of the Government in these trying times.

Agenda for Action

Considering the large scale investment in the textile sector and sluggish demand in the domestic markets, exports are the only avenue to ensure uninterrupted production and capacity utilisation. It is thus imperative to cover the entire textile value chain in the RoSCTL Scheme including cotton yarn and fabrics.

This will ensure that only products are exported and not taxes. This will also provide the much needed impetus in the context of fluctuating cotton prices and appreciating Rupee which are eroding competitiveness.

A five point 'Agenda for Action' should thus be urgently drawn up to meet the decline in exports as follows – (i) Devise means to grow India's trade to benefit from the trade diversion currently arising from the escalation in trade / tariff disputes between China and USA; (ii) Address the issue of preferential tariffs given by China to India's competitors like Pakistan, Indonesia and Vietnam

CHAIRMAN'S MESSAGE

by developing ways and means to gain special access; (iii) Find ways to compensate transaction cost of 8-10% borne by exporters on account of high logistics cost and infrastructural disabilities: (iv) Continue MEIS benefits at enhanced rates for madeups, enhance it for fabrics and also extend it to cotton varn; and (v) RoSCTL benefits should cover the entire textile value chain including cotton yarn and fabrics, along with including exports of cotton yarn under 3% Interest Equalization Scheme.

Government Meetings

To address some of these issues we had a meeting with the Hon'ble Minister of Textiles Smt. Smriti Zubin Irani and the newly appointed Secretary, Ministry of Textiles, Shri Ravi Capoor on 5th August 2019 in New Delhi. The Hon'ble Minister was fully sympathetic to the problems faced by the exporters and assured that all steps will be taken to address the concerns raised by the Council.

Texworld USA

The Council organized group participation of Members at held at New 'TEXWORLD, USA' York City from 22nd to 24th July 2019. Texworld USA is perceived as providing a prime opportunity to Textile & Apparel manufacturers to connect with the top buyers in the North and Central American markets. This is one of the events supported by the Ministry of Commerce under MAI scheme and the Consulate General of India, New York, USA.

Seventeen Members of the Council participated in the combined three sections of the Fair, namely, Texworld for Fabrics, Home Textile Sourcing and Apparel Sourcing – all in the same venue. Participation at the fair clearly showed that there are good opportunities for exporting value added fabrics like embroidered fabrics, digital printed fabrics, etc. The present USA–China trade conflict also provides good scope for increasing exports of fabrics from India.

'India Trend Fair, 2019' Japan

The Council organised group participation of Indian companies at the 5th International 'India Trend Fair' (ITF) 2019 which was held at the Belle Salle Shibuya Garden, Tokyo, Japan from 24th to 26th July 2019. The participation at this 'only for Indian exporters' fair was organised pursuant to the visit by a high level delegation from India, led by the Secretary (Textiles) in February this year. The objective of the high level delegation was to identify areas for optimising the India-Japan Comprehensive and Economic Partnership Agreement (CEPA) with the eventual aim of enhancing textile trade as textile items have zero duty under the CEPA.

The Council participated in the ITF with 20 participants in the Texprocil pavilion and overall there were over 100 Indian exhibitors in the Show. Other exhibitors included exporter members from AEPC, HEPC and EPCH. The Council was offered a free stall of 20 sqm. by the organisers for distribution of promotional literature and brochures. The lapanese importers who visited the Fair were interested in organic as well as sustainable products. There were enquiries for fabrics mainly for ladies dresses as well as finished canvas fabrics for bag making.

On the home textile front, good leads were generated for the towel segment as well as rugs and floorings. There is good scope to increase our presence in the bed segment too as many of the trading houses and agents are interested in sourcing home textiles from India. If the Indian exporters are able to match the required quality and adhere to Japanese standards then the Japanese market can provide a huge boost towards increasing exports. We need to continue our efforts to penetrate the Japanese market especially in the contract and hospitality segments of the home textiles in the context of Olympics being organized in July 2020 in Tokyo.

Way forward

Friends, as we look ahead in the current year, many challenges are looming in the horizon. The trade war between USA and China is escalating by the day. Further escalation of the trade war could weigh on investment, hiring and ultimately consumption. The retaliatory moves by the USA and China's counter response by permitting its currency to depreciate will have far reaching consequences in reshaping supply chains.

At the same time the BREXIT process has reached a crucial phase causing a slide in the value of the UK Sterling. The ongoing tensions in the subcontinent also have implications for our trade.

While only time will tell how these developments will play out, we need to keep our vigil and reinforce our competitiveness by building on trade opportunities as they emerge in these uncertain times. Timely interventions by the Government would also be of great help.

Dr. K. V. Srinivasan Chairman :: TEXPROCIL ::



JOIN US... NOW! & avail of our Membership Benefits To know more, please write to us on email:

info@texprocil.org

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COVER STORY

TEXPROCIL @ TEXWORLD USA



The Council organized a group participation of Members at 'TEXWORLD, USA' held at New York city from 22nd to 24th July 2019.

Seventeen Members of the Council participated in the combined three sections of the Fair, namely, Texworld for Fabrics, Home Textile Sourcing and Apparel Sourcing – all in the same venue.

The three-in-one show consolidated the Fabric sourcing at 'Texworld'; contract manufacturing, private-label and original design manufacturing resources at the International 'Apparel Sourcing' show; and the home décor fabrics and finished soft goods at the 'Home Textiles Sourcing' Expo.

Based on the highly successful trade fair "Texworld in Paris", Texworld USA is perceived as providing the prime opportunity for Textile & Apparel manufacturers to connect with the top buyers in the North and Central American markets. This is one of the events supported by the Ministry of Commerce under MAI



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scheme and the Consulate General of India, New York, USA.

About TEXWORLD, USA

Texworld USA is the largest sourcing event in the American continent for apparel fabric buyers, product development specialists, designers, merchandisers and overseas sourcing professionals. This Fair is one of the important events for the American buyers to meet with manufacturers from major supplying countries. 830 exhibitors participated in this three-in one Fair showcasing Fibre to Fashion under one roof. Purpose of co-locating three shows was to create a sourcing destination in New York for the entire textile and clothing value chain. This international business platform offered a wide array of Fabrics, Accessories. Home Textiles, Apparel and Services.

Partners to Texworld USA

The "Sub-Council of Textile Industry - China Council for the Promotion of International Trade" (CCPIT – Tex) has merged their own standalone event "China Textile & Apparel Trade Fair (New York)" with Texworld / Home Textile / Apparel Sourcing Fair being organized by Messe Frankfurt, USA. More than 72% of the exhibitors at the July, 2019 edition of this combined Fair were from China.

Visitor Profile

It was reported by the organisers that over 5,000 trade visitors visited the three shows together over the three days of the Show. Trade Visitors were mainly from East Coast of USA and a few from other countries in the Central American region. Visitors were mainly:

- Fabric buyers looking for new developments
- Designers looking for the latest fabrics and accessories
- Professionals in every facet of the industry – looking for fabrics, latest trends and reliable apparel fabric suppliers
- Retailers; Manufacturers; Trading Companies; Wholesalers; Buying Offices & Agents
- It was reported by the organisers that top 5 product group that visitors were interested in were: Cottons; Prints; Lace & Embroidered fabrics; Eco friendly textiles & Jacquards.
- Decision makers from several well-known brands visited the show.

Exhibitor Profile:

Top 5 exhibiting countries were: China, South Korea, India, USA & Taiwan. Over 70% of exhibitors were from China.

COVER STORY

TEXPROCIL @ TEXWORLD USA

Product Groups: Cottons; Denims; Embroidery; Fibers; Functional Fabrics; Knits; Lace; Linen; Prints; Silk; Silky Aspects; Wool; Accessories/Trims; Bed-Bath-Kitchen

End User Groups: Activewear; Children/Infant wear; Junior wear; Ladies wear; Menswear; Sportswear

- Textiles of innovative structures and blended fabrics were the main focus of presentation by several exhibitors at this event.
- Recycled and Sustainability initiative were adopted by every exhibiting country.

Feedback and Observations

- Indian exhibitors of suiting, shirting and embroidery fabric were satisfied as many leading direct importers visited the Fair and booked sample orders on the spot.
- Indian exhibitors of Home textiles and apparel were disappointed as most of the visitors were boutique companies looking for small quantity orders.
- Quality & varieties of products exhibited by the Chinese and South Koreans were simply much superior. India continues to be in basics while rest of the competing countries are moving fast towards value addition, creative fibre blends and new techniques in prints and fabric finishes.
- Chinese exporters / exhibitors were of the opinion that additional tariff imposed by US is not affecting fabric business as the importers are nominating Chinese suppliers to supply to other conversion centres, mainly,

Bangladesh, Pakistan, Cambodia, Vietnam and Sri Lanka. But, the Chinese mentioned that orders for garment & home textile export to USA has started declining in anticipation of possible additional tariff in future. Chinese believe, in long term, China will lose its market share in Apparel supply to other competing countries

There is a well established supply chain arrangement between major importers in USA and Chinese manufacturers / exporters. Hence additional tariff imposed by USA on China and vice versa will lead to increasing level of outward processing by Chinese.

Conclusion:

- Considering the profile of visitors at the July 2019 edition of this show, it is best suited to focus on value added fabrics for future participation in this event.
- Indian exhibitors should focus more on eco-friendly, sustainability and re-cycled products to attract interest amongst large scale importers of textiles.
- It is important to finalise list of Indian exhibitors at least six weeks prior to the start of the Fair and undertake extensive publicity in North and East Americas to create awareness amongst the importers about profile of Indian exhibitors.
- With the help of Indian Missions in USA & Messe Frankfurt - USA office, B2B meeting platform on the event website, exclusively for Indian exhibitors, need to be created in future participations.

:: TEXPROCIL::

PRESS RELEASE

Declining Exports of Cotton Yarn, A Matter of Deep Concern : TEXPROCIL



Dr. K. V. Srinivasan, Chairman, Texprocil stated that exports Cotton Yarn from India in the first quarter of April-June 2019 have fallen by a steep 33%. From 338 Mn Kgs for the period April-June 2018 to 226 Mn Kgs in April – June 2019. Month on month decline from 90 Mn Kgs in April 2019 to 77 Mn Kgs in May to 59 Mn Kgs in June, is a matter of

deep concern. In fact, the level of 59 Mn. Kgs is the lowest monthly export in the last five years.

The cotton yarn sector has been one of the pillars of the Indian textile industry and is also highly modernised, technology driven & provides sustainable income to farmers.

The steep fall has been caused by a variety of reasons including decline in exports to leading export markets like China, Bangladesh, South Korea and the duty free access given for import of cotton yarn by China to countries like Pakistan and Vietnam from 1st April 2019.

Considering the large scale investment in the spinning sector and sluggish demand in the domestic markets, exports are the only avenue to ensure uninterrupted

production and capacity utilisation.

Shri. K. V. Srinivasan pointed out that even though cotton yarn is a value added product, it has been excluded from the export benefits like interest subvention, MEIS and the ROSCTL schemes.

In view of the above the Chairman, Texprocil appealed to the Government to include cotton yarn in the interest subvention scheme and also rebate the embedded taxes like Agricultural Cess, Mandi Tax, Power and Fuel Surcharge which incurred in the production process. The ROSCTL Scheme which rebates these levies should be extended to cotton yarn sector at the earliest.

This will ensure that only products are exported and not taxes. This will also provide the much needed impetus in the context of rising cotton prices & appreciating Rupee which are eroding competitiveness.

Dr. K. V. Srinivasan stated that in case the current trends of declining exports continue in the next quarter, it will lead to closure of several spinning units in the near future, resulting in layoffs.

:: TEXPROCIL::

TRADE PROMOTION

'India Trend Fair' (ITF) 2019, Tokyo, Japan



Inauguration of 5th India Trend Fair (ITF) by Council's, Executive Director along with the Ambassador in Japan, Tokyo on 24th July 2019

The Council participated in the 5th India Trend Fair (ITF) which was held at the Belle Salle Shibuya Garden, Tokyo Japan from 24th to 26th July 2019. This Show is only for Indian exporters and the Council's participation in this Fair came pursuant to the recent visit of a high level delegation from India, led by the Secretary (Textiles) in February this year. The objective of the high level delegation was to identify areas for optimising the India Japan Comprehensive and Economic Partnership Agreement (CEPA) with the eventual aim of enhancing textile trade as textile items have zero duty under the CEPA.

The Council participated in the ITF with 20 participants in the Texprocil pavilion and overall there were over 100 Indian exhibitors in the Show. Other exhibitors included exporter members from AEPC, HEPC and EPCH. The Show had predominantly apparel suppliers along with a mix of other made-up product like bed linen, bath linen, rugs, scarves stoles etc.

Trade

At present, even though Japan is the third largest importer of T&C products, India's share is very low at only 1.2%. Amongst the T&C items, India has a presence in garments (of 0.9%) and madeups (of 0.7%).

Japan imported US\$ 37.7 billion worth of T&C items of which imports from India were only US\$ 460 million. Almost 75% of Japan's imports of US\$ 28.7 billion while the balance US\$ 9.2 billion were in textiles. Japan's import of cotton textiles of US\$ 3.7 billion was approx. 40% of the total import of all textiles. India ranks 4th in supply of cotton textiles to Japan.

Under the India - Japan CEPA which has been in force from August 2012, almost all Indian Textiles and Clothing products qualify for duty free access into Japan, thereby offering good potential to increase India's export share to this market.

About ITF

This year the fair was being held for the 5th time and the show is popular among representatives of many sectors such as apparel, handicrafts, home fashion and accessories etc. The made-up segment including bed and bath linen was introduced in this edition. The Show is organised by the Japan India Industry Promotion Association (JIIPA) and was supported by the Embassy of India in Tokyo.

The ITF was inaugurated by the Ambassador of India to Japan, H.E. Sanjeev Kumar Verma in the presence of the Secretary, Textiles Committee, Mr Ajit Chavan, President of Nissenken Quality Evaluation Center, Mr. Nobuhiro Komada and Chairmen of AEPC and EPCH. The Ambassador commended the team of ITF for growing the Show from its first edition with numbers as well as range of product display.

Approx. 3000 buyers of apparel, handicraft, madeups and home fashion accessories visited the Show over the three days and as per feedback from exporters under the Texprocil pavilion orders worth US\$ 150,000 were recorded.

Characteristics of Japanese market

Although population is declining household numbers are on the increase leading to expected rise in real estate and home renovation market, The consumers are brand conscious while purchasing home textiles and they show strong preference for products with low environment impact.

The demand for towels are mainly from service sectors like hotels, restaurants and hospitals with increasing use of microfiber. This demand is expected to rise in the next year as Tokyo is the venue of the 2020 Olympics. Japan has its own towel production facilities with a major portion of towel sale for gifting purpose where special packaging is required.

TRADE PROMOTION

'India Trend Fair' (ITF) 2019, Tokyo, Japan

Imports of home textiles are mainly through textile trading houses and distribution via wholesalers and dealer agents. Trading firms also deal directly with retailers while some high end department stores sometimes deal directly with imports or with brands.

Texprocil stall

The Council was offered a free stall of 20 sq mt by the organisers for distribution of promotional literature and brochures. The Council also took the opportunity to promote the next RBSM which will be held in Coimbatore from 17-19 March 2020. The Texprocil film as well as the film on the RBSM was played on the TV screens strategically positioned at the venue. Approx. 15 enquiries were received at the Council stall.

Issues:

- One of the major requirements and expectations from Japanese importers is of stringent quality in all the products that are imported. The consistency in quality has to be maintained all through the consignments imported and hence there are many sample exchanges and delays before placement of a final order.
- Sometimes after getting the business also, there are instances where repeat orders don't have same quality & are then rejected even for minor flaws.
- Many exporters are unaware of the Japanese Standards as few of these standards are translated and available online while there are still some which are only in Japanese.





• Culturally similar and geographically accessible countries like China and Vietnam have gained advantage over India in the textile exports to Japan.

Suggestions:

- Trend workshops should be organised to create awareness within the Indian exporters on the colours, patterns etc. that work in the Japanese market.
- The online manual of Japanese Standards (in English) will be disseminated to the members.
- Training for technicians and inspection personnel on Japanese textile standard requirements can be closely coordinated with the Textiles Committee
- For the next edition, the organisers have been advised to arrange a separate bedding, bath and kitchen section so that the home textile exhibitors are not mixed with other products
- Target a focussed set of home textile exporters capable of meeting Japanese standards
- Visit of a delegation comprising major home textile and contract textile exporters such as hospitality and institutional linen (Motel and Laundry towels, salon towels, blankets, napkins, kitchen towels etc.) to meet with bulk buyers / major importers and trading houses considering that the demand for these products will be high due to the Olympics being held in July 2020.

:: TEXPROCIL ::



Avail of more detailed information on EXIM POLICY at TEXPROCIL GREIVANCE REDRESSAL CELL email: ravikumar@texprocil.org

TRADE NOTIFICATION

MEMBERSHIP SATISFACTION SURVEY

Dear Member,

Finally fill in your complete information below and respond to the questions below by tick (\checkmark) marking appropriate response in								n		
the space provided or with suggestions in brief wherever necessary. We value your association with us and prompt feedback.										
				COMPANY IN	IFORMA	ATION				
Name of the Company			:							
Contact Person & Designation			:							
TEXPROCIL Membership (RCMC) No.			:							
Email Address & Website			:							
 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		
 a. Are you generally satisfied with the services actively availed by your company and marked above? Tick (✓) 				ailed	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) *Kindly ignore this feedback form, if you have already responded. 				Suggestions:						
* 17 i.e. al I.e. I.a. a. a. a. a.	thic foor	thack form if you h	nave alr	eady responde	ed.					

TRADE NOTIFICATION

TEXPROCIL MEMBERSHIP ANNUAL RENEWAL SUBSCRIPTION

The Annual Renewal Subscription for the financial year 2019-2020 for existing members has become due for payment from 1st April, 2019, 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/-	

Note: GST Invoice will be issued on receipt of payment.

Note for Members:

- Members are also requested to submit the CA Certificate as per the format given below certifying the Export Turnover for the financial years 2017-2018 & 2018-2019 i.e. the amount of actual FOB value of exports of Cotton Textiles excluding Readymade Garments and Handloom Textiles.
- Members may note that the eligibility criterion of annual export turnover is minimum Rs. 2 Crore. Those not fulfilling the criteria will automatically be renewed as RTE i.e. Registered Textile Exporter.
- RTEs are not required to submit the CA certificate.

Format of Chartered Accountant Certificate to be submitted by Members only: CHARTERED ACCOUNTANT CERTIFICATE

(on C.A.'s Letter Head)

TO WHOMSOEVER IT MAY CONCERN

 This is to certify that M/s.
 (Name and full address of the Member) having

 IE code No.
 have exported Cotton / Cotton Yarn / Cotton Fabrics / Cotton Madeups (Excluding Handloom Items / Readymade Garments and Silks, etc.) during the financial year 2017-2018 & 2018-2019 as follows:

Sr. No.	Description	2018-2019 (Rs. FOB Value)	2017-2018 (Rs. FOB Value)
1	Cotton		
2	Cotton Yarn		
3	Cotton Fabrics		
4	Cotton Made-ups		
	TOTAL		

(Stamp & Signature of Chartered Accountant)

(Membership No. of Chartered Accountant)

(Firm Registration No. of Chartered Accountant)

PLACE:

DATE:

Note to Members & RTEs whose RCMC has expired on or before 31.03.2019:

Please apply immediately for renewal of RCMC with the following documents (self-attested copies) on mail or upload them online through member login from TEXPROCIL's website:

- [1] Copy of Importer-Exporter Code (IEC) of the company
- [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 and newly appointed.

Members may obtain RCMC & Renewal documents online through member login on TEXPROCIL's website. The procedure is as follows:

- Go to the Membership Login Menu and click on 'Enter Now' at Membership Management Program
- Since you are already registered member of the Council, you need to choose Registered Member at Member login page between New Member and Registered Member.
- Once you click on Registered Member, you should type your email id registered with the Council for the login purpose as User Name and type company's Importer Exporter Code (IEC) code as password.
- You can view all the details of your company and can get RCMC, renewal documents etc. by clicking on 'Company Details'.
- You can also upload your export returns online.

(For any further queries please write to Mrs. Smita Dalvi on email : smita@texprocil.org)