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**CHAIRMAN'S MESSAGE**



Dear Friends,  
As we move forward into the remaining months of the current year, the prognosis for the World Economic

Outlook by the IMF is "a long and difficult ascent", aptly summing up the challenges that lie ahead of us both at the global and national levels. According to reports, while each quarter is showing a stronger recovery than the previous one, we still have a long way to go before laying any claims to return to normalcy.

**ITMF Hybrid Virtual Conference**

At the recently concluded ITMF Conference held in Seoul from 20-22 October, 2020 in a hybrid (physical / virtual format) experts brought out the far reaching impact of the COVID-19 pandemic on businesses across the world and the expected structural shifts in the global trading environment in its wake.

For instance, it was pointed out

that the world is witnessing the emergence of 3 D's viz., Deglobalisation, Digitalising and De-Coupling which are likely to define trading patterns in the coming years. This basically means greater reliance on localism, contactless businesses, and re-engineering of supply chains, specially in the context of US-China trade tensions.

It was also pointed out that the top 200 Textile Companies saw a decline in sales of 34% during the last eight months of the pandemic this year. Further, during the eight month pandemic period, online trading grew higher than the growth it registered during the last six years!

Speakers also emphasised the inexorable speed of technology and the onset of Industry 4.0 built around "Smart Factories" and "Advanced Manufacturing".

Analysts at the Conference indicated that 20 million Robots are likely to be put to use in the Textile and Clothing Sector by 2030. This is likely to result in layoffs of 30 million low skilled workers, even as one Robot replaces 1.6 workers.

ITMF International Textile Manufacturers Federation  
**HEARTIEST CONGRATULATIONS**  
**Dr. K. V. SRINIVASAN**  
Chairman, TEXPROCIL  
on being elected as  
**VICE PRESIDENT - ITMF (2020-2022)**  
Proud moment for  
**TEXPROCIL**  
&  
**INDIAN TEXTILE & CLOTHING INDUSTRY**

## CHAIRMAN'S MESSAGE

## CONTINUED FROM PAGE 1

Well friends, these estimates are meant to enable us to reflect on the way our business is likely to shape up in the future and our own preparedness in meeting new challenges.

### Trade Developments

The process of unlocking has been accelerated in our country, facilitating thereby the resuming of trade and manufacturing activities. This has also resulted in the gradual removal of trade restrictions and implementation of reform measures intended to facilitate growth in consumption and exports as mentioned below:

- i) In a welcome move, the Government has removed restrictions on the exports of all types of masks.
- ii) The Government has also extended the validity of the RoSCTL scheme from 31.03.2020 to 31.03.2021 or until such date the scheme is merged with the RoDTEP scheme, whichever is earlier.
- iii) The Government has also extended the CGST exemption on airfreights and sea freights related to exports by one year from 30.09.2020
- iv) The office of the Textile Commissioner has relaxed the timelines for the submission of applications for UIDs and JIT Inspections under the ATUF scheme and has also notified a checklist for the Joint Inspection Team (JIT) for physical verification of machineries which

will be followed by its Regional Offices.

- v) The Department of Revenue has started implementing the Customs (Administration of Rules of Origin under Trade Agreements) Rules, 2020 from September 21, 2020, on all imports on which preferential rates of duty are claimed in terms of a trade agreement.
- vi) DGFT has issued the much awaited Notification to implement the ROSL scheme for the pending claims. The Department of Revenue has also issued Notification for the implementation of the scheme by the Customs. We now hope that the online application form for ROSL is activated on the DGFT website at the earliest so that exporters of Made ups and Garments can start applying for the duty credit scrips under the scheme.
- vii) The Government has also brought about far reaching changes in Labour Laws which have a direct bearing on labour intensive sectors like Textiles and Clothing.

44 labour laws have been subsumed under 4 codes. The four Codes include: a) Code on Wages; b) Code on Industrial Relations; c) Code on Social Security; d) Code on Occupational Safety, Health and Working Conditions.

In order to familiarise the Trade and Industry with the changes in the Labour Laws, the Ministry of Textiles organised a Webinar on 22 October, which was addressed by the Hon'ble

Minister of Textiles, Smt. Smriti Zubin Irani and Shri Ravi Capoor, Secretary, Ministry of Textiles. Leading members of the Council participated in the event where the Ministry of Labour made a presentation.

Members should take note of all these changes and be guided accordingly.

With regard to paragraph (v) above, members should take special care while importing under any Trade Agreement at concessional or zero duty and familiarise themselves thoroughly with the requirements for such imports before placing orders with the overseas suppliers.

### Way forward

Friends, even as we cope with the uncertainties in our businesses, the short-term economic outlook would depend on how we handle the "second wave" of infections. Already there are reports of lockdowns in the U.K. Germany, France, Belgium as the pandemic rears its head. How long it will continue is anybody's guess, as the world awaits a reliable vaccine to neutralise the pandemic.

Going forward with a sense of optimism can be possible, if we quickly appreciate and understand the underlying trends that are emerging and changing the way we may have to operate our businesses and transact with our customers.

Undoubtedly, the COVID-19 pandemic will prove to be a game changer in many ways!

**Dr. K. V. Srinivasan**  
Chairman

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**COVER STORY****Improving Cotton Applications & Usages**  
By Shri K K Lalpuria – ED & CEO – Indo Count Industries Ltd.

The launch of Indian Cotton Brand “Kasturi” at the hands of Smt. Smriti Zubin Irani, Hon’ble Minister of Textiles and Women & Child Development on 7th October, 2020 is a new beginning for the country’s cotton and cotton textiles sector. After years of wait and pursuing the 2B approach, the country is now entering into the B2C methods of promoting cotton.

The launch of “Kasturi” brand on the “World Cotton Day” is a gift to trade and industry and calls upon them to begin this new journey with a lot of confidence and resolve to achieve a significant position in the world of branded cotton. It will be interesting to approach the “New-look Cotton” with a marketing standpoint.

**Cotton in India**

Given the abundant availability of cotton in India, the real challenge is to figure out how we can increase the applications and further the utilization of cotton. In absence of a branding approach for years together, cotton was being treated just as a ‘commodity’ and lacked efforts toward value addition. For almost the last decade the consumption of Extra Long Staple (ELS) cotton in India has been stagnating. Altogether cotton was yet to be standardized like Egyptian and Supima Cotton.

It’s time that a fragmented approach of cultivation of cotton should be uplifted and India should have more standardized approach towards growing cotton moving towards a better quality, uniformity and consistency. To be able to position “Kasturi” there is a need to deliver the brand value which has to be consistent. We need to position this brand in the world where it stands vis-a-vis the other brands. This depends on how, in their end-use products, textile firms utilize and make the most of this brand to catapult it to the next level. Therefore, a lot needs to be done on the growth side of cotton.

**Impact of COVID-19**

In the wake of the recent

developments, global textile firms are seen adopting a new 360 Degrees approach post the recent pandemic. In India, the impact of COVID-19 has left everyone in the textile industry thinking about whether they are large enough to take on to the opportunities or whether they can address the issues raised by the pandemic.

Be this or that, some sort of consolidated approach is required to meet the ‘New Normal’ wherein home has become the center stage in people’s life and lifestyle. They are required to collaborate between work, entertainment and leisure rather than going out. That gives a big advantage to home textiles and lot of other areas like apparel too. It is very essential to make the most of such opportunities to increase consumption post the pandemic.

**Potential Recovery Solutions**

The next logical question is – What are the Potential Recovery Solutions as far as cotton is concerned? There are three aspects to this – one is the ‘environmental performance’ addressing issues faced by the ‘planet’, second is the ‘economic performance’ determining the ‘profitability’, and third is the ‘social performance’ resolving concerns of the ‘people’.

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## COVER STORY Contd...

## Improving Cotton Applications & Usages By Shri K K Lalpuria – ED & CEO – Indo Count Industries Ltd.

Environmental performance can be improved by providing consumers a compelling reason to use products made out of sustainable cotton like organic and BCI cotton. While India has made substantial foray in organic cotton, it needs to decide how to do BCI cotton in the country.

India reigns at almost at 51 per cent as far as the world price and value addition is concerned. In terms of the crop that is being produced whether the pricing is efficient or expensive or can go towards cost reduction needs to be addressed. Improving productivity and yield by employing better farm practices can improve profitability and determine the country's economic performance.

On social side, the dire consequences of climate change and its social impact need to be addressed. With improved collaboration between the corporate and the farmers now much can be done in order to sustain the livelihood of the farming communities.

### Issues in the current supply chain

Along with comprehending a suitable farm strategy to recognize future advances, it is also important to see how India can build on a holistic system in order to provide recovery solutions. Also there is a need to have a support system for the farmers because seed quality and the research which is being done on the seeds has a lot of confusion. Regularising the same will lead to be much better yields in the process.

### Organizational Learnings

Learnings for the organizations include the need to build their core competence and integration of processes over time. They need to spend more time on research,

development of market insight and innovation. In a world where newer ideas are evolving, they need to touch base with the consumers out there in order to truly evaluate their products and bring about novelty in their offerings.

During 2008-10 people were demanding organic and eco-friendly products. Then in bedlinen they are started asking performances, which is quick dry, safe bleach and wrinkle free products. Going forward in 2015-16, they started asking various product, which is antibacterial, antibug, anti-mite and all that product came into the world. Then they started asking for better sleep, more comfort needed to be provided to the products. Hence a lot of home textile companies began to research how you can provide better sleep and it is not known in future whether they will ask for dreams.

Similarly, Kitchen linen and many other downstream products like-outdoor furnishing, sleeping bags, camouflage fabrics, etc. hold a lot of promise which one can explore in cotton applications and bring specialisation in them.

Improving Effectiveness using new-age marketing techniques like digitalization etc. will help the manufacturers to become much more acceptable to the World. This is a good opportunity for them in a very cost effective way where they can explore the market and promote their brand.

### Consumption Improvements

Trends like Africa discouraging the use of second-hand clothing are in the right direction to improve consumption. In terms of packaging materials, the trends for substituting plastic, paper, leather are seen on

the rise. Even the Indian companies supplying bed sheets to the world have substituted plastic to the extent of 20% in the last few years. In seeking to innovate, these companies made an attempt to replace all these material which has contributed to the growth in cotton consumption and backed their sustainability program as well.

Also there has to be a holistic approach towards cotton fiber, which has grabbed the attention merely as a cash crop. It has not been looked upon for its simple uses such as cooking oil, salad dressing or cattle-feed. The cotton value chain lacks backward integration and continues to remain all fragmented. There is a scope of having a complete vertical setup that can help to attract the farmers to choose cotton crop, promote consumption of other uses of cotton beyond the allure of being a cash crop.

The cotton consumption and use will have a lot of space to increase if market is studied and deeper insights are obtained to make more value added products in future.

### Farm to Fabric Value Addition

With increased consumption and improved traction available for cotton, there is a dynamic need to reinvent ourselves and stay relevant in the market. In terms of design innovation, we may recall the Indian innovation in "Madras checks" promoted to the world by a USA Designer. This wonderful idea with simple design invention is till now remembered by not only one retailer but many of the retailers in the world. Similarly Indian 'Dohar' - the duel blanket and Jaipur Blanket need to find their space against the Minsk/Acrylic Blankets demanded by the world. ...Contd. on Page. 5.



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**EXPERT SPEAKS****Cotton Resurgence: New Age, New Look Cotton!!**  
By Shri Suresh Kotak – Chairman, Kotak Commodities Ltd.

C o t t o n resurgence... means giving a new look to Cotton in this new age.

The launch of “Kasturi” brand of Indian Cotton is a step in the right direction because the word “Kasturi” means fragrance and the fragrance of a brand is nothing else, but it is a thing that percolates in the environment where the consumers dominate and it must meet and will surely meet the consumer’s expectations.

Cotton is gaining focussed attention all around, pervasively with the institutions, with the

stake holders and the new-age approach is remarkable. Everybody is missionary and this vision started around the visit of delegation of Minister to Mali and it was reinforced by C4 African nations.

Every cotton nation, every cotton functionary wants something to be done for cotton. This kind of the new-age approach, extraordinary appeal, and out-of-box thinking definitely will reveal a lot many aspects of Cotton’s prosperity.

Cotton itself has a remarkable property of regeneration. That cotton is regenerative resource – is very important because it goes about giving a fillip to the resource

position of any country and creates employment across the supply chain. The cotton plant is like what we call in India “Kalpavruksha”.

Every part of the cotton is utilizable, every part has a value, and can generate a lot of new jobs, new products, and new industries.

Now we have to see that this industry becomes a lot prosperous, becomes highly employment generative. In my opinion one extra bale of cotton can generate five people employment. This kind of employment potentiality is something very great. The nations can become wealthy out of cotton.

... Contd. on Page. 7.

**COVER STORY**  
Contd...**Improving Cotton Applications & Usages**  
By Shri K K Lalpuria – ED & CEO – Indo Count Industries Ltd.

India can explore a lot of wonderful ideas to promote such products, then, of course, there is the brand route that has just been started. Like Egyptian and SUPIMA varieties, the country needs to position the home grown “Kasturi” brand and see that it does not falter into delivering the value to the customer.

**Meeting Sustainable Goals**

The trade should also learn that ‘value addition’ is the Mantra which one should go after and seek how to capitalize either through branding route or research route or any other means where can definitely bring in the value.

For cotton it is necessary to explore ideas... be imaginative... and just allow it to perform by finding new

applications which are very well available and can very well be capitalized.

Sustainability projects need to be scaled up in the country by finding more support among the corporates to join into getting closer to the farmers, understanding their issues, delivering them the latest know-how about better farming and extending all possible help. There is a need to start somewhere and program & build all this activity as part of CSR because the country is indebted to farmers for the ‘White Gold’ they produce.

**Conclusion**

Cotton is always around us, it is everyone’s responsibility to see how it’s growth can be sustained in the future by taking ‘branding’ as an

opportunity. India has performed well in the last three decades particularly in the madeups segment. Looking holistically at cotton one can start finding value in it and the opportunity that it brings along with it. To achieve more, the only thing required is to be patient, innovate, improve research, get into the act even deeper with the latest market insights and then perform with a confident outlook.

(This article is a transcript of the Presentation made by Shri K K Lalpuria, ED & CEO, Indo Count Industries Ltd. at ‘New-Look Cotton’ seminar on ‘World Cotton Day’ Oct-7. To access the presentation scan this QR CODE.)

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## SPECIAL FEATURE

**Making Cotton Great – India can...!!** By Mr. Andrew Macdonald  
ITMF Board member, Chairman ITMF Spinners Committee, ICA Past President



I bring you greetings from the International Textile Manufacturers Federation (ITMF) and my colleagues on the Cotton Spinners Committee of the ITMF, a committee encompassing dedicated cotton spinners from all over the world.

I offer my congratulations to the organisers of this meeting to celebrate world cotton day. I bring you greeting also from my country Brazil, suffering like so many countries with this terrible virus, and the disastrous death toll. I pray to God for an end to this pandemic and the suffering, but ladies and gentlemen, I pray that we do not fail to learn from this lesson to teach us the desperate need for global cooperation politically and protecting the environment.

It is therefore opportune that on this special cotton day, when we celebrate what cotton has achieved for man, not only for our wonderful textiles making the world beautiful, but for bringing mass employment to many hard working people, from farmers to textile workers. Therefore under the banner of cotton, the call is to unite and demonstrate our wonderful product, though promotion, and, the idea of modern branding, as India is proposing is an excellent opportunity. India is the founder of cotton and continues to lead the world in terms of production and quality. However on this joyous day for cotton, as we have learnt from the pandemic, we must not sit still and wait for things to happen, as things are happening, perhaps creeping on us without realizing the significance,

which will one day impact on our cotton. India and cotton have such a bright potential, but like all potential if we are not prepared and moving, and understanding the times, we might fall in the danger of stagnation. That's why I welcome Brand of Indian Cotton, but with it comes tremendous responsibility to ensure the success it deserves.

I don't think we can overestimate the public demand for sustainability, which is today expanding not only from the green world pressure, but also the "grey" world. Organic and BCI cotton made great strides in term of cotton acceptability, but today, but not to my likening, many are excited by the growing impact of what I call the "grey" movement, "grey" because pollution is today perhaps even more controversial than sustainability, so Ladies and Gentlemen recycling is the name of the game. Recently many spinners and weavers are telling me that the clients want textile products made out of recycled material, or contain some recycled element, meaning recycled man-made fibres.

But Cotton is the perfect recycled product, it degrades and returns to the earth, and this has been is our traditional argument, but the attack never ceasing that though, we grow cotton from recycled earth, it still needs abundant water, insecticides and pesticides.

Lady and gentlemen, we need to face this challenge head on – we all know this negative press (false news) is not true, especially in India, but we cannot stand back and today we have to more than even brand our cotton as being 100% recyclable.

Recycling of polyester or other manmade fibres, is only postponing the inevitable, so that how many times man-mades are recycled, the product will end up always as pollution, be it in landfills or in our seas.

Cotton too may be recycled, re worn, even at the end used as a floor cloth, but it does not have a half-life, it has a full life.

As we promote cotton and encourage consumers to buy and use cotton, let us take the high road, selling cotton's natural, exotic and outstanding attributes, and not resort to attacking the competition.

We all have room for constant improvement, in terms of sustainability and quality to ensure our products are environmentally friendly, especially in the area of reductions in application of chemicals in the fields.

India has led the way in terms of genetic modification saving the use of millions of kilos or should I say millions of tons of insecticides and pesticides, so we must Brand our cotton as nature's gift to the world, and we must commit ourselves to continue to make Cotton Great Again.

Dear illustrious people here today, representing outstanding India can make it happen.

**(This article is a transcript of the Speech delivered by Mr. Andrew Macdonald, ITMF Board Member, Chairman ITMF Spinners Committee, ICA Past President, at 'New-Look Cotton' seminar on 'World Cotton Day' Oct-7. To access the Speech scan this QR CODE)**



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## TRADE ANALYSIS

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

As per the quick estimates released by Ministry of Commerce, Cotton Textile exports reached a level of USD 932 million in Sept 2020 marking a growth of 15.39 per cent against the corresponding month of Sept 2019, wherein exports were

valued at USD 808 million.

In rupee terms, exports during the month of Sept 2020 reached a level of Rs. 6,848 cr. as against Rs. 5,761 Cr. in Sept 2019 recording a growth of 18.87 per cent in rupee terms.

Exports of cotton textiles during the period April – Sept 2020 have shown a decline of (-) 19.47% reaching a level of USD 4.02 billion over the previous year with exports of USD 4.99 billion during the period April – Sept 2019.

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Exports Commodities	Values in Million USD				% Change	
	SEP'19	APR'19 -SEP'19	SEP'20	APR'20 -SEP'20	SEP'20	APR'20 -SEP'20
<b>Cotton Yarn / Fabrics /Made-ups, Handloom Products etc.</b>	<b>808</b>	<b>4,992</b>	<b>932</b>	<b>4,020</b>	<b>15.39%</b>	<b>-19.47%</b>
Man-made Yarn/Fabs./Made-ups etc.	395	2,355	359	1,443	-9.12%	-38.72%
RMG of all Textiles	1,080	7,874	1,190	4,784	10.22%	-39.25%
Jute Mfg. including Floor Covering	30	170	35	137	18.64%	-19.45%
Carpet	106	689	151	590	42.89%	-14.40%
Handicrafts excl. handmade carpet	149	908	181	636	21.82%	-29.98%
Textiles	1,487	9,114	1,659	6,826	11.54%	-25.11%
Apparel	1,080	7,874	1,190	4,784	10.22%	-39.25%
<b>Textiles &amp; Apparel</b>	<b>2,567</b>	<b>16,988</b>	<b>2,849</b>	<b>11,609</b>	<b>10.99%</b>	<b>-31.66%</b>
All Commodities	26,024	159,162	27,584	125,246	5.99%	-21.31%
% Share of T&C in Total Exports	9.9%	10.7%	10.3%	9.3%		

Source: DGCIS / MOC

## EXPERT SPEAKS Contd...

## Cotton Resurgence: New Age, New Look Cotton!! By Shri Suresh Kotak – Chairman, Kotak Commodities Ltd.

As a matter of fact, I believe that the textile industry – also needs a Pari Passu treatment like farmers. Pari Passu makes sense today because unless the demand is there, supply chain gets inherent weaknesses. So demand pull is the most dominant economic factor. Supply is a push factor but demand is a pull factor. So the pull factor must pervade the economy.

Our country will prosper, as cotton will give wealth to our Nation and employment to many people.

Farmers have to benefit but we must work out a system that one subsidization cuts two ways – incentivizes and remunerates farmer and equally incentivizes the consuming textile sector.

Firstly, innovation is very important

and Cornell University in America has done notable work on the Nano Technology in cotton. In India, the Nano Technology developed by CIRCOT is an example that what can be done even to the Linter. Cotton Incorporated also has developed a number of innovative products.

The second most important point, which is emphasized by McKinsey is the Circular Economy against linear economy, which is coming into operation. So with the changing situation the farmers will definitely prosper. But for the farmers to really prosper we have to excavate the value of cotton. We have to add value to the cotton.

Sustainability is important, but the kind of the competition which our industry has to bear from other other

fibers makes it imperative that we must make cotton much more competitive and an affordable raw material so that the industry also thrives.

So sustainability must be understood in the modern sense, but actually in the inherent sense the cotton is sustainable. For a fibre, that has outlived its course for 7000 years itself proves its sustainability.

(This article is a transcript of the Speech delivered by Shri Suresh Kotak, Chairman, Kotak Commodities Ltd. at 'New-Look Cotton' seminar on 'World Cotton Day' Oct-7. To access the Speech scan this QR CODE).

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## 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 2019-2020 and 2020-21 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	

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)

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