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TEXPROCIL Enewsletter



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A fortnightly publication of THE COTTON TEXTILES EXPORT PROMOTION COUNCIL OF INDIA

Volume IV. Issue No. 47 November 27, 2020

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Need for Focus Product Incentive Scheme (FPIS)



The Government has extended the Focus Linked Product Scheme (FLPS) to 10 additional sectors including textiles as part of the thrust to create Champion sectors. The Cover Story gives a quick introduction of the FLPS Scheme aimed at improving competitiveness in textiles sector.

CHAIRMAN'S MESSAGE



Dear Friends,

The festival of lights and the new Samvat 2077 year did bring in cheers as the holiday shopping season led to an encouraging surge of business revival. According to the latest reading of the Goods Trade Barometer released by the World Trade Organisation (WTO), the world trade also appears to have bounced back in the third quarter of calendar 2020, after dropping 17.2 percent (year-on-year) in the second quarter.

Despite the positivity, the outbreak of a second wave of the pandemic across Europe and USA has raised questions on the sustainability of the revival as more lockdowns, closure of businesses leading to financial distress can be envisaged. The growth is likely to slow in the fourth quarter as pent-up demand is exhausted and inventory relocking is completed.

India-Kuwait on-line conference

In order to improve prospects of

export of textile products from India, TEXPROCIL, at the instance of Embassy of India in Kuwait, organised a 'Virtual Conference on Indian Textiles' followed by a 'Buyer Seller Meet' on November 18, 2020. The event also promoted national campaigns like 'Invest India' and 'Atma Nirbhar Bharat'. In my welcome speech at the event we called upon the Kuwaiti importers to explore possibilities of trade and investment in the Indian T&C Sector. Shri Raj Gopal Singh, Deputy Chief of Mission & Head of Commerce at the Indian Embassy in Kuwait along with Mrs. Smita Patil, First Secretary (Pol. & Com.) and Mr. Fahad Ahmed Khan Suri Second Secretary (Pol. & Com.) actively participated at the event attended by over 50 participants from both Kuwait and India. At the meeting Ms. Mishika Nayyar from 'Invest India' introduced the various avenues available for investments in the Indian Textile Sector.

The Council's Executive Director also made a presentation on "Bilateral Cooperation in the Textile Sector between India and Kuwait" which

was well received by all those present. In view of the pandemic situation, the Council is planning more such initiatives to be undertaken on the digital platform in markets like Sri Lanka, Egypt, Dubai, etc. in the near future.

EU GSP Regime

The EU's current GSP regime expires in December 2023, and preparations for its replacement are underway. The Council had earlier circulated the information on the consultation being carried on by the EU Commission (EC) since March 2020, vide E-Serve no. 159, dated July 15, 2020. The Council also responded to the EC's online questionnaire, which not only focused on features of the current regime, but also allowed for submission of written observations going beyond responses to the questions.

As a part of the ongoing effort, the Council again impressed upon the Government for a level playing field for Indian exports to the EU vis-à-vis competitors like Bangladesh, Pakistan who have zero duty access under the Everything But

CHAIRMAN'S MESSAGE

CONTINUED FROM PAGE 1

Arms (EBA) and GSP “plus” Scheme respectively. On the other hand, importers in the EU have to pay a duty of 9.6% when they import comparable goods from India.

It was also pointed out that India is steadily losing market share to Pakistan in 40 items (Apparel – Madeups) as almost 87% of Pakistan's T&C products have “zero-duty”. On account of this Pakistan exports have increased by 50.5% from a level of US\$ 4,180 million in 2013 to US\$ 6291 million in 2019. On the other hand, India's exports to EU have stagnated between US\$ 8,629 million in 2013 and US\$ 8,682 million in 2019 with a negligible growth of 0.6%.

Furthermore, the European Commission has extended the GSP+ status to Pakistan till 2022 which means that Pakistan will continue to enjoy preferences under GSP+ on its exports to EU countries and will in all probability reach India's level of US\$ 8 billion in T&C exports by 2022, while Indian exports will continue to remain stagnant!

Suggestions on Foreign Trade Policy

As you are aware, the Foreign Trade Policy (2015-20) was extended for a year and is valid till March 31, 2021. In order to prepare a new five year FTP, the office of the DGFT have invited suggestions for the next Foreign Trade Policy from TEXPROCIL and various stakeholders, vide Trade Notice No. 34/2020-21 dated Nov. 12, 2020.

Under the FTP, the government announces steps to promote goods and services exports. Since 2011-12, India's exports have been hovering at around USD 300 billion. During 2018-19, overseas shipments stood at USD 331 billion, while it aggregated USD 314.3 billion in 2019-20. The policy document provides various

benefits under different schemes such as merchandise export from India scheme (MEIS), services export from India scheme (SEIS), advance authorisation and export promotion of capital goods (EPCG).

Members are requested to send their suggestions on the FTP in the prescribed format circulated by the Council vide E-Serve no. 246 dated November 21, 2020, so that consolidated suggestions can be sent to the DGFT. We solicit your cooperation and support in the matter and look forward to receiving your suggestions at the earliest.

Initiatives under 'Atma Nirbhar Bharat' Package 3.0

The recent measures announced under the 'Atma Nirbhar Bharat' initiative are innovative and designed to attract investments and create employment opportunities. A new Scheme “Atmanirbhar Bharat Rozgar Yojana” has been launched to incentivise creation of new employment opportunities during the COVID recovery phase. The Government has also announced extension of the existing Emergency Credit Line Guarantee Scheme (ECLGS) 2.0 which guarantees credit for supporting stressed sectors including Textiles in line with the recommendations of Kamath Committee. On November 12, 2020, the Union Cabinet has also given it's approval to extend the Product Linked Incentive Scheme to the Textiles sector with an outlay of Rs. 10,683 Crores.

Focus Product Incentive Scheme (FPIS) has been conceived for the textiles sector to remove disabilities and to create global champions in MMF apparel and technical textiles sectors. This scheme aims to create 50-60 world class global champion

companies in these segments. The Council has also requested for the inclusion of value-added madeups and cotton fabrics under the scheme.

Under the FPIS, for achieving an incremental turnover of 50% over baseline (minimum Rs. 100 – Rs. 500 Crores) in the previous year, incentives are proposed to industry at the rate of 9% for the 1st year, 8% for the 2nd year and so forth coming to 5% for the 5th year. The Turnover ratio of MSME has been raised recently, hence, this scheme will benefit the MSME sector. It will also attract investment in the sector and generate additional employment.

The scheme will be operational for 5 years from 2021-22 to 2025-26. Late incumbent joining the scheme will get lesser incentives for lesser period because scheme is for 5 years only.

We are confident that the extension of the Production Linked Incentive Scheme in the identified sectors will help promote India's global competitiveness in these sectors.

Way Forward

Friends, in these trying times, a sustained economic recovery can be made possible only by stimulating private consumption and investment, which are the major drivers of economic activity.

Taking confident steps in conducting our businesses to meet the “new normal” can be expected to give the much needed momentum to economic recovery. It is only hoped that a “breakout” of a second wave of the pandemic does not put the clock back and hamper the process of recovery.

Dr. K. V. Srinivasan
Chairman

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info@texprocil.org

COVER STORY**Need for Focus Product Incentive Scheme (FPIS)****Need for Focus Product Incentive Scheme**

The reform measures announced recently by Government of India under the various schemes are innovatively designed for attracting the global investor community and inviting foreign investment in the country.

The objective is to promote large-scale manufacturing in India in order to reduce our import dependence and make our exports competitive in the global market, as also increasing our participation in global value chains.

The Government has extended the Focus Linked Product Scheme (FLPS) to 10 additional sectors including textiles as part of the thrust to create Champion sectors.

In the textile sector the Scheme has been extended to 40 Man-made Fibre (MMF) garment products and 10 Technical Textile Products.

Market scenario (Domestic & Global)

Domestic Textile and Apparel market including export is around US\$ 140 billion in 2018-2019.

With growth in disposable income - domestic consumption including exports of T&A is likely to increase at 12% CAGR to reach US\$ 280 billion by 2025.

Man-Made Fibre Sector (MMF)

MMF is expected to contribute about 84% of total fibre mill consumption between 2015-2030 (source: PCI Wood Mackenzie).

International Cotton Advisory Committee (ICAC) estimate about 80% of fibre consumption will be contributed by non-cotton segment by 2025.

India's mill fibre consumption ratio of Cotton vs. MMF is 60:34. On the contrary, global mill fibre consumption ratio of Cotton vs. MMF is 30:70.

Our share, in global MMF exports (in all lines) is 2.8%.

Global exports in the 40MMF identified line under the Scheme is US\$ 140 billion.

India's export share of the identified 40 MMF apparel lines is 0.77% (USD 1.08 billion out of US\$ 140 billion)

Technical Textiles

Share of globally traded top 10 technical textiles lines is USD 82 billion.

Whereas India's aggregate share is: 0.85%.

Structure of the Scheme

The Scheme is envisaged in three tranches as follows: -

- Turnover between Rs. 100 Crores- Rs.500 Crores
- Turnover above Rs. 500 Crores
- Greenfield Projects with investment limit of Rs. 500 Crore and above.

For turnover between Rs.100 to 500 crores, incentives will be paid to the Companies @ 9% on incremental turnover of 50% in the first year. For subsequent years, the incentive rate is reduced by 1% for each year on incremental growth of 50% p.a till the end of 5 years.

For turnover above Rs.500 crores, incentives will be paid to the Companies @ 7% on incremental turnover in the first year on 50% incremental growth.

**TEXPROCIL E-NEWSLETTER**

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COVER STORY**Need for Focus Product Incentive Scheme (FPIS)****40 MMF Apparel Lines exports in 2019 (US\$ in Mn) and share in global exports (%)**

Product code	Product label	Global	India	Bangladesh	Vietnam	India	Bangladesh	Vietnam
		Value in US \$ Million				Share in Global Export (%)		
611030	Jerseys, pullovers, cardigans, waistcoats and similar articles	26125.37	70.10	2613.675	1929.398	0.3%	10.0%	7.4%
620193	Men's or boys' anoraks, wind-cheaters, wind- jackets and similar articles	10828.58	5.19	575.469	1915.618	0.0%	5.3%	17.7%
620293	Women's or girls' anoraks, indcheaters, wind jackets and similar articles	10362.39	4.44	423.342	1519.182	0.0%	4.1%	14.7%
620343	Men's or boys' trousers, bib and brace overalls, breeches and shorts	8056.63	99.75	733.252	1436.879	1.2%	9.1%	17.8%
610463	Women's or girls' trousers, bib and brace overalls, breeches and shorts	7974.81	23.03	260.903	1056.146	0.3%	3.3%	13.2%
620463	Women's or girls' trousers, bib and brace overalls, breeches and shorts	6736.06	137.49	365.354	972.898	2.0%	5.4%	14.4%
620213	Women's or girls' overcoats, raincoats, car coats, capes, cloaks	5153.92	4.24	109.584	374.432	0.1%	2.1%	7.3%
610443	Women's or girls' dresses of synthetic fibres, knitted or crocheted	5050.64	86.86	124.906	455.85	1.7%	2.5%	9.0%
611596	Full-length or knee-length stockings, socks and other hosiery, incl. footwear	4306.64	28.82	2.305	81.59	0.7%	0.1%	1.9%
620433	Women's or girls' jackets and blazers of synthetic fibres	4086.95	29.13	81.978	301.681	0.7%	2.0%	7.4%
610343	Men's or boys' trousers, bib and brace overalls, breeches and shorts	3996.61	48.45	161.397	584.799	1.2%	4.0%	14.6%
611241	Women's or girls' swimwear of synthetic fibres, knitted or crocheted	3879.49	0.19	87.886	315.728	0.0%	2.3%	8.1%
611430	Special garments for professional, sporting or other purposes,	3825.56	66.72	121.355	344.76	1.7%	3.2%	9.0%
611030	Jerseys, pullovers, cardigans, waistcoats and similar articles	26125.37	70.10	2613.675	1929.398	0.3%	10.0%	7.4%
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For subsequent years the incentive rate is reduced by 1% for each year till the end of 5 years on an incremental growth of 25% p.a.

In the case of Greenfield projects, there has to be a minimum investment of Rs.500 crores and in the first year the incentive is 11% subject to achieving 3 times turnover of investment i.e. Rs. 1500 Crores. In subsequent years, the incentive rates are reduced by 1% subject to 25% incremental growth achieved p.a till the end of 5 years.

Implementation of the Scheme

A total amount of Rs.10,683/- Crores has been earmarked.

The Scheme will be available for 5 years from 2021-22 to 2025-26

Late incumbent joining the scheme will get lesser incentives for lesser period because scheme is for 5 years only.

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TRADE FACILITATION

Suggestions on Foreign Trade Policy

E-Serve No.: 246 of 2020 | Date: Nov. 21, 2020
Cir. No. EPS/103/2020-21 | To: Members of the Council
Sub : Suggestions on Foreign Trade Policy

Dear Member,

As you are aware, the current Foreign Trade Policy is valid till 31.3.2021.

The office of the DGFT have invited suggestions for the next Foreign Trade Policy from the Council. In this regard, DGFT has issued a Trade Notice No. 34/2020-21 dated 12.11.2020, a copy of which is circulated by the Council.

You are requested to please send us your suggestions on the FTP on the email IDs ravikumar@texprocil.org / vimal@texprocil.org positively on or before 30.11.2020 in the prescribed format (circulated) so that consolidated

suggestions can be sent to the DGFT.

Your suggestions may be on the Foreign Trade Policy, Hand Book of Procedures, Forms & Appendices with justification. Also please mention the relevant para in the FTP and the Hand Book of Procedures while sending us the suggestions.

We solicit your co-operation and support in the matter and look forward towards receiving your suggestions at the earliest..

Regards,

Dr. Siddhartha Rajagopal
Executive Director

::TEXPROCIL::

COVER STORY Contd...

Need for Focus Product Incentive Scheme (FPIS)

40 MMF Apparel Lines exports in 2019 (US\$ in Mn) and share in global exports (%) contd...

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Top 10 Technical Textiles Lines

HS Codes at 6 digit	Commodity	Global Export in 2019 (USD bn)	India's export in 2019 (USD bn)	India's share in global market export (%)
961900	Sanitary towels (pads) and tampons, napkins and napkin liners for babies, and similar articles, ...	15.75	0.04	0.23%
392190	Plates, sheets, film, foil and strip, of plastics, reinforced, laminated, supported or similarly ...	15.21	0.34	2.23%
870895	Safety airbags with inflator system and parts thereof, for tractors, motor vehicles for the ...	11.65	0.05	0.39%
391810	Floor coverings, whether or not self-adhesive, in rolls or in the form of tiles, and wall or ...	9.25	0.06	0.66%
950699	Articles and equipment for sport and outdoor games n.e.s; swimming and paddling pools	6.53	0.11	1.63%
590320	Textile fabrics impregnated, coated, covered or laminated with polyurethane (excluding wall coverings ...	5.90	0.00	0.08%
300610	Sterile surgical catgut, similar sterile suture materials, incl. sterile absorbable surgical ...	4.99	0.03	0.57%
621040	Men's or boys' garments of textile fabrics, rubberised or impregnated, coated, covered or laminated ...	4.28	0.02	0.49%
300590	Wadding, gauze, bandages and the like, e.g. dressings, adhesive plasters, poultices, impregnated ...	4.27	0.05	1.17%
300510	Adhesive dressings and other articles having an adhesive layer, impregnated or covered with ...	4.14	0.01	0.17%
	Total	81.96	0.70	0.85%

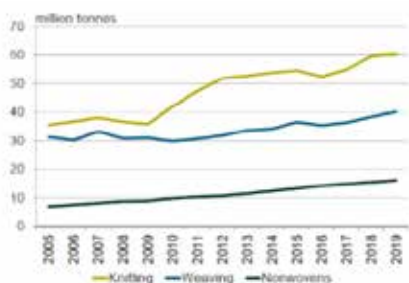
EXPERT SPEAKS

“THE FABRIC YEAR 2020”

By Mr. Maximilian Schäfer & Mr. Andreas Engelhardt

“The Fabric Year 2020” report jointly presented by Mr. Maximilian Schäfer of Groz-Beckert and Mr. Andreas Engelhardt of The Fibre Year Consulting is looking mainly at the three different technologies for fabric formation, namely weaving, knitting and nonwovens since the year 2005. The end of 2004 marked the end of the Agreement on Textiles and Clothing (ATC) which basically ended the quota system that was governing trade in textiles and apparel.

1. World Fabric Production



Source: Fabrics Year 2020, Groz-Beckert & The Fiber Year Consulting

As can be seen in graph 1, the volume of global knitted fabrics in 2005, was slightly larger than that of global woven fabrics (approx. 32 million tons vs. approx. 36 million tons). But after the financial crisis in 2009, the growth of knitted fabrics accelerated significantly compared to that of woven fabrics. By 2019, the volume of knitted fabrics reached around 60 million tons as compared to 40 million tons of woven fabrics. During the same time span (2005 and 2019) the volume of nonwoven fabrics increased from around 8 million tons to around 17 million tons.

The main reasons for this relative stronger growth of knitted fabrics

are that production costs of knitted fabrics are lower than those of woven fabrics, that there are new applications for knitted fabrics (i.e. for shoes as of 2012) and that there is a trend to more leisure wear.

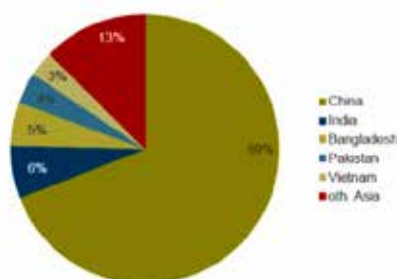
2. Share of Fabric Technologies 2019



Source: Fabric Year 2020, Groz-Beckert & The Fiber Year Consulting

Looking at the regional distribution, production of knitted and woven fabrics in 2019 is heavily concentrated in Asia (see graph 2). 91% of global woven production and 86% of global knitted production was located in Asia. In Greater Europe around 8% of global knitted and 5% of global woven fabrics were produced in 2019, while in the Americas these shares amounted to 4% and 3%, respectively.

3. Top 5 Asian Knitting Industries 2019

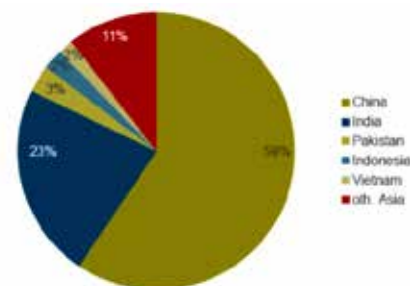


Source: Fabric Year 2020, Groz-Beckert & The Fiber Year Consulting

Within Asia, China is by far the largest producer of knitted fabrics (see graph 3) in 2019 with a share of 69% followed by India as distant second with 6%, Bangladesh with 5%, Pakistan with 4% and Vietnam with 3%.

Similarly, with a share of 59%, China was also the dominant producer of woven fabrics (see graph 4), followed by India with 23%, Pakistan with 3%, and Indonesia and Vietnam with 2%, respectively.

4. Top 5 Asian Weaving Industries 2019



Source: Fabric Year 2020, Groz-Beckert & The Fiber Year Consulting

With regard to the supply side, the authors of “The Fabric Year 2020” expect that, in general, the process of globalization will continue. In their view, sourcing of non-essential products like apparel and home textiles will not move to high-cost countries.

As for the demand side, the “new normal” will be on a lower level than pre-Covid-19 and will affect all segments like apparel, home, textiles, carpet and technical textiles.

Due to the supply and demand shocks caused by the pandemic, retail business suffered in all regions. In China, physical retail sales of apparel,



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email: ravikumar@texprocil.org

TRADE NOTICE**ITMF - 6th Corona Survey****E-Serve No.: 248 of 2020 | : Date: November 26, 2020****To: Members of the Council****Sub : ITMF - 6th Corona Survey****Dear Member,**

The series of ITMF Corona-Surveys continues with the 6th edition.

The survey is conducted with the help of Survey-Monkey. To complete the survey will take less than 5 minutes.

We request all our members to kindly participate in the survey on the following link.

<https://www.surveymonkey.com/r/6thITMFCoronaSurey>

We request you to kindly complete the survey by 4th December 2020.

In case of any query, you may please contact:

Dr.Christian Schindler

Director General

International Textiles Manufacturers Federation

Email : christian.schindler@itmf.org

Regards,**Dr. Siddhartha Rajagopal****Executive Director****:: TEXPROCIL ::****EXPERT SPEAKS****Contd...****“THE FABRIC YEAR 2020”****By Mr. Maximilian Schäfer & Mr. Andreas Engelhardt**

footwear and textiles fell by around -20% in the first half of 2020. On the other hand, online sales increased by around +1%.

From January until August 2020, US-apparel imports from China dropped by -48% in value, but only -7% in volume. Those from India dropped by -32% in value (-30% in volume) and those from Vietnam by -10% in value (-20% in volume). In the EU, apparel imports from January until June 2020 were down -18% in value (-24% in volume). In Japan, apparel imports between January and August fell by “only” -3.5% in value (-6.8% in volume).

The Corona-pandemic has impacted and changed consumption trends in 2020. On the one hand, office/formal wear, ties, dresses, shoes and denim have experienced significant decreases as did corporate home textiles and automotive nonwovens. On the other hand, casual, lounge- and sportswear have seen increases as did home textiles and of course medical and hygiene nonwovens.

The outlook for the 4th quarter 2020 and for 2021 is uncertain. A second wave of Covid-19 infections in Europe and North America is threatening the continuation of the economic recovery with more restrictions being announced almost on a daily basis. Unemployment is still relatively high in the USA and disposable income have

dropped by 2.7%. Government wage support schemes are running out and need to be prolonged to support the recovery.

The relative dominance of knitted over woven fabrics is expected to remain unchanged. Within the knitting segment, circular and warp knitting are doing better than flat knitting. The trend of reduced spending on formal wear as well as on non-essential will continue.

Asia will continue to gain global share in knitted and woven production and China will remain the number one fabric supplier.

Demand for sanitary and hygiene nonwoven products (wipes, facemasks) will likely continue at a permanently higher level. China added around USD 30 billion in exports of masks in the first half 2020. Other countries will now build such capacities. Nonwoven capacities could grow in China and Turkey by around +10 to +15%.

For the full set of slides, please go the following website <https://www.groz-beckert.com/en/contact-form.jsp> or contact Groz-Beckert at contact@groz-beckert.com.

Source: Article edited by Dr. Christian Schindler, Director General, ITMF

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Avail of more detailed information on
EXIM POLICY @ TEXPROCIL

Please Contact: GREIVANCE REDRESSAL CELL

email: ravikumar@texprocil.org

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.

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

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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