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TEXPROCIL Enewsletter



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Cover Story :

Textile Industry in Romania



According to Euratex trade statistics, Romanian textile sector performed much better than the garment sector in 2018. Romanian textile exports rose 11.9% during the year, while imports were up 6.6%. Even Romanian garment exports went down 4.5%, while imports soared 20.5%. The Cover Story gives an account of opportunities available in Romanian textiles sector.

CHAIRMAN'S MESSAGE



Dear Friends,

The Council's 66th AGM is being held online in a hybrid model on December 5, 2020. As I pen down this last column for all

of you as Chairman, I express my sincere gratitude to all the members for their cooperation and support in enabling me to discharge my duties.

Remembrances and Realities

The two years I spent as Chairman TEXPROCIL have been truly memorable as we faced many challenges and also dealt with them effectively. We took up the challenge of export promotion in a "mission mode" to achieve our sectoral targets in often turbulent times.

During these two years, we had to deal with issues relating to abrupt changes in policies, delays and denials of pending claims under various incentive schemes, the implementation of GST, need to find alternative schemes for granting export benefits which were WTO

compatible and finally a spreading pandemic and the consequent impact of a severe "lockdown" imposed by the Government to contain its impact.

Time and again we critically evaluated the practicality of our strategic approach and advocated activities that would contribute to meeting the diverse needs of our membership and the industry.

For our membership, we ensured the consistent redressal of their grievances and articulated our arguments to the policy makers well supported by data, whether it was the introduction of the ROSCTL Scheme or the need to find alternative WTO compatible schemes for extending export benefits.

It was a matter of great satisfaction that the data submitted by us for calculating rates under the ROSCTL Scheme in 2019 resulted in a satisfactory rate of 8.25% announced for Made-ups. Similarly the Council succeeded in convincing the Government to not only rebate state levies but also pointed out

the need to refund central levies which were outside the ambit of GST. The Government agreed to our suggestions and came up with the Refund of State & Central Taxes Levies (ROSCTL) Scheme which was an extension of the Refund of State Levies (ROSL) Scheme by including the central levies along with the state levies while calculating rebates.

Similarly the concept of "embedded taxes" which has now been incorporated in the Refund of Duties, Taxes on Exported Products (RODTEP) Scheme was also a by-product of the intense discussions the Council had with the exporters. We were able to demonstrate to the Drawback Committee the incidence of these taxes by quantifying it. The Department of Revenue accepted the Council's suggestions and incorporated it into the format for collecting relevant data for working out the rates under the RODTEP Scheme.

On the marketing side, for the first time, the Council organised a Reverse Buyer- Seller Meet (RBSM) in Coimbatore in January 2019 with

CHAIRMAN'S MESSAGE

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support of the Government of Tamil Nadu and the Ministry of Commerce, Government of India. Around 85 buyers from 24 Countries visited Coimbatore and the event was a mega success.

A second edition of the event had been planned in March 2020 and all arrangements were made, but owing to the pandemic the event had to be cancelled.

This event was held later in September 2020 on a virtual platform where again around 215 buyers (55 domestic & 160 overseas) participated from 50 countries. This was another first for the Council. With restrictions on international movement of persons and strict COVID protocols in place participation through virtual platforms is going to be the new normal. Considering this, the Council also organised buyer - seller meets with importers in Kuwait and Sri - Lanka and participated in the Tex world USA show in July 2020 on a virtual platform.

With a view to exploring new markets, I also led delegations to Colombia, Poland, Portugal, Peru and Sri - Lanka. The interactions with the textile associations in these countries were extremely fruitful as we were able to not only increase trade but were also able to assess the manufacturing capabilities in these Countries by visiting factories.

Trade Scenario

Looking back at the two years from September 2018 to the period at present, the world trade has been sluggish, dotted with risks and uncertainties and the growth rates have also been muted. Events such as the future of the European Union (EU)

following "BREXIT", trade tensions between China and the USA, a return to protectionist policies in large parts of the world (including India) continue to cast their shadow across global, regional and bilateral trade.

As we move ahead in the current fiscal year 2020-2021, the challenges especially in the export sector get further accentuated on account of the outbreak of the pandemic.

Today, as the 'second wave' of pandemic intensifies its grip over the global economies and India becomes an epicentre of the pandemic led shocks, the Country's GDP has contracted for the second successive quarter (July - September, 2020) by 7.9% COVID-19 on the back of an earlier contraction of 23.9% during the first quarter (April- June, 2020). This has pushed the country into a 'technical recession' for the first time in its history and is a matter of concern.

Policy Advocacy & Response

In such a scenario, government support measures, policy reforms and export benefits should be extended to the entire textile value chain, as they will have a critical bearing on our competitiveness, pricing and export growth.

Friends, the Council continues to play a pro- active role in taking up the problems faced by exporters in their day to day interactions with the Government bodies such as Customs, GST Commissionerates, ICEGATE, GSTN, Regional offices of DGFT, RBI, Banks, ECGC, etc. Many of the issues have been sorted out and others are receiving attention with repeated follow ups.

On it's part, the government has responded positively by undertaking policy reforms, extending monetary / fiscal support to the extent possible and gradually removing the trade restrictions with a view to facilitate growth in demand and thereby increase the consumption. The reform measures being undertaken to support the trade and industry are expected to bring about export growth as well.

Advancing beyond Covid-19

The COVID-19 pandemic has pushed the countries around the world into unforeseen financial and humanitarian crisis. Each country is responding to the crisis in its own way by giving fiscal stimulus depending on their ability and capacity to do so without aggravating the macroeconomic indices. The debate between saving lives and livelihoods will perhaps get finally settled, once a credible vaccine is made available in the market.

Till then, the design of the recovery curve, post COVID-19, is likely to be based on perceived national priorities and technological strength of each country. However, in the labour intensive textile sector, the road to recovery is expected to traverse through measures like policy support for innovative strategies, leveraging new international partnerships and providing stimulus for adoption of new technology.

It needs to be pointed out that in spite of the trying times, success stories were also reported from within our country which should inspire us to look for opportunities amidst the rising challenges. A sterling example of this is the remarkable feat achieved



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COVER STORY

Textile Industry in Romania



Under communist rule, Romania had the biggest production capacity in the whole Eastern Bloc, after Russia. Romanian textile and garment industry has seen an overall decline since 1989 mainly due to higher degree of competition from other countries such as Turkey, China, India, Pakistan, Thailand and Mexico. The high competition has forced the big Romanian companies to reorient their production towards disadvantaged economic regions due to net advantages from the point of view of legislative regulations, fiscal policy, environment protection regulations and the cost of labour.

Since 1989, the Romanian textile sector has also been changing due to the new economic, social and political conditions. There have been structural changes along with quantitative and qualitative changes as well. The share of garment sector in the industry rose from 28% in December 1989 to 62.5% in January 2004 and 44.7% in January 2015. Surprisingly, however, according to Euratex

trade statistics, Romanian textile sector performed much better than the garment sector in 2018. Romanian textile exports rose 11.9% during the year, while imports were up 6.6%. But Romanian garment exports went down 4.5%, while imports soared 20.5%.

Between 2007-2017, 135,000 jobs were lost in the textile industry of Romania as a result of rising competition, both from within the EU region and from Asia. Other factors included financial crisis, and VAT hikes discouraging foreign investment. As of 2019, around 148,000



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*(For private circulation only)*CHAIRMAN'S
MESSAGE

by India in attaining the second position in the global production of PPE suits. Thanks to the business skills and undaunting spirit of our textile entrepreneurs combined with the ability to rise to the occasion and live up to the demands of the times, the country was able to achieve self-sufficiency in production of PPE Suits in 90 days.

We need to understand the process that led to this stupendous achievement and see if we can replicate it across the textile value chain for standard products.

Way forward

Friends, as I demit office, and hand over the charge to my successor at the end of the 66th AGM of the Council being held on 5th December, 2020, I am happy to note that the industry is re-casting itself on the path of

CONTINUED FROM
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innovation, value-addition and quick response with the help of modern technologies. I cannot help imagine a 'New World' taking shape where a growing thrust on technology will change the way we think and do our businesses.

The COVID 19 pandemic should be seen as an aberration and we need to push the past behind us and look ahead with renewed resilience and resurgence.

The Textile Sector has overcome several crises in the past and this one too shall pass.

On that positive note, I would wish each one of you 'the Very Best' for all your future endeavours.

Stay Healthy and Stay Safe!

Dr. K. V. Srinivasan
Chairman

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COVER STORY

Textile Industry in Romania

people were employed in Romania’s textile and garment industry.

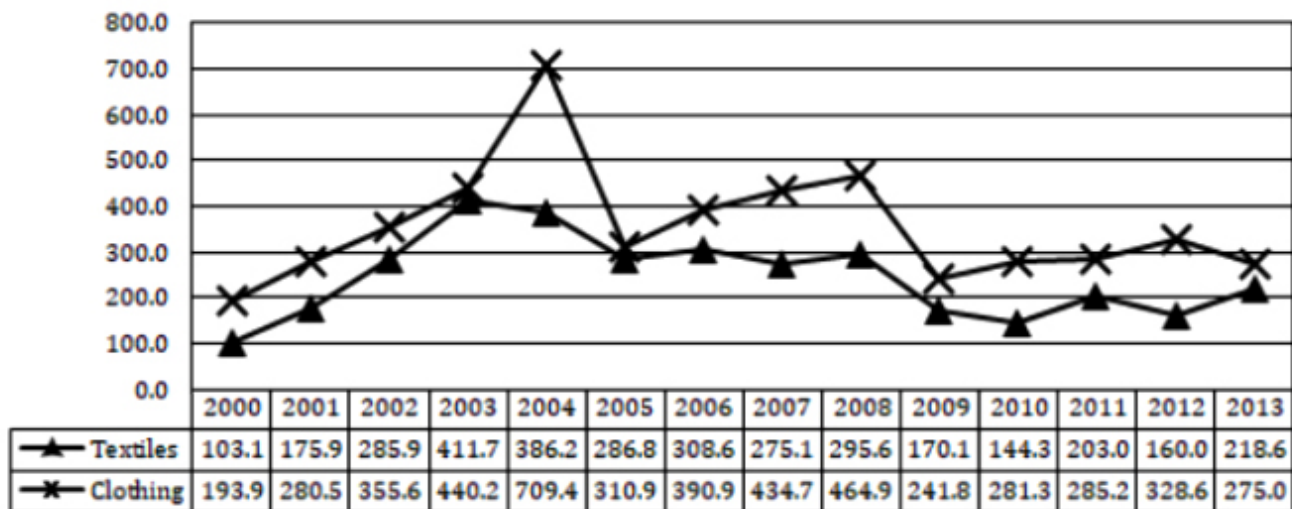
Since 2007, when Romania joined European Union, clientele of Romania’s big textile companies such as Faberrom has changed in favour of top luxury brands. Today, less than 200 people sew garments in Faberrom for prominent western brands, and production has dropped from 7,000 to only 350 pieces per day.

The most important characteristic of garment industry in Romania has been the development of the Lohn production system, in which Romanian companies became subcontractors of foreign companies, without their own identity on the market (in terms of brand image, visual identity etc.). Because of the Lohn system, the local textile industry has had to suffer with the local demand becoming very low.

According to Figure 1 that shows investment in textiles and garment industry of Romania, there is a clear difference in the investment evolution between the two

sectors. Thus, if in the start of the period, i.e. 2000, in the garment sector there were investments of about 90 million Lei higher than those in textiles, in 2003 the amounts invested for the two sectors were approximately the same. Amid the sharp rise of production in the Lohn system, in 2004 over 709 million Lei were invested in the garment firms, while the funds allocated to textile firms were lower by approximately 25 million than in 2003. Investments were made mainly in machinery and production equipment so that firms could accept external controls. This explains the decrease to less than half of this indicator in the next year as firms have already been re-technologized. Continuous fluctuations followed, without a predetermined pattern that can reveal a dependency or similarity between the two sectors. In 2013, it can be noted an improvement of this indicator compared to data from 2000. Investments in textiles doubled, reaching 218.6 million Lei in 2013, while in the garments industry investments were only of 275 million Lei.

Figure 1. The Evolution of Net Investments (mil. Lei – 4.8 Lei is roughly equivalent to 1 Euro)



Romanian textile and clothing industry has a long tradition of production and supply to foreign markets, due to its proximity major Western importers. An advantage for potential investors is that there are prerequisites for genuine competition for companies in the market.

Some important facts about textile and garment industry of Romania:

- (i) Total imports of textile and garment by Romania from other countries: Euro 1.49 billion (2018).
- (ii) Total exports of textile and garment by Romania to other countries: Euro 0.81 billion (2018).
- (iii) Major items of import: Synthetic fibers, cotton and

cotton yarns, cotton and cotton fabrics, wool and wool type fabrics, silk fabrics, knitwear, socks and stockings (2018).

- (iv) Major items of export: Knitwear, synthetic fibers, wool yarn and wool type, synthetic yarn fabrics,
- (v) Top countries from where textile and garment is imported by Romania: Italy, Poland, UK, Germany, Spain.
- (vi) Top countries to which Romania exports textile and garment: Italy, France, Germany, Austria, Macedonia, Moldova.

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TRADE FACILITATION

Important Trade Contacts in Romania

List of major textile and garment companies of Romania along with contact details:

TANEX SRL	NOVA TEXTILE SRL	TRICOTEX Bacău
Sos. Bucuresti - Magurele, nr. 47B, Sector: 5, 051432, Bucuresti, Romania Tel: 0040-21-421-0216 Email: office@tanex.ro Website: www.tanex.ro	Str: George Cosbuc, nr. 70, 110103, Pitesti, Jud. Arges, Romania Tel: 0040-248-282-883 E.: office@nova-textile.ro Web.: www.nova-textile.ro	Str. Tineretului , nr. 2, Bacau, Romania Tel: 0040-234-515-220 E.: office@tricotexbacau.ro W.: www.tricotexbacau.ro
ANN REEVES & FRANCESCA	VASTEX S.A.	MAJUTEX S.R.L.
Str. Nicolae Balcescu, nr.173, Pitești, Argeș 110066, Romania. Tel: 0040-248-280-535 Email: office@francesca.ro Website: www.francesca.ro	Strada Stefan cel Mare, nr. 273, 730006, Vaslui, Romania. Tel: 0040-235-361-536 Email: office@vastexvs.ro Website: www.vastexvs.ro	Str. Dafina Doamna nr. 46, Bârnova 707035, Romania Tel: 0040-723-553-707 Email: office@majutex.ro Website: www.majutex.ro

Details of industrial parks and regions of Romania

Sabaru Industrial Park	Adlo Oradea (Oradea local development agency)	Cisnădie Industrial and Business Park
Alexandriei Venue nr. 544, km.14, 07025 Bagadiru, Ilfov, Romania Tel: 0040-021-4481-498/ 0040-21-4481-499 Mobile: 0040-749-550-143/ 0040-749-550-140 Email: office@sabaru.ro Website: www.sabaru.ro	Str. Primăriei nr 3, parter, Oradea, Bihor Tel: 0040-359-889-389 E-mail: contact@adlo.ro Website: www.adlo.ro	I Sibiu I Romania Phone: 0040-721-264-044 Email: office@spatiidepozit.ro Website: www.spatiidepozit.ro
Miroslava Industrial Park	Moreni Industrial Park	
Str. Nicolae Balcescu, nr.173, Pitești, Argeș 110066, Romania. Tel: 0040-248-280-535 Email: office@francesca.ro Website: www.francesca.ro	Miroslava, Iasi County, Romania Tel: 0040-232-295-680, 0040-748-663-344 Email: office@miroslavaindustrial.ro Website: www.miroslavaindustrial.ro TELEFON: 0245 668490; FAX: 0245 668490; Director General : 0723 661064 parci_moreni2002@yahoo.com	TELEFON: 0245 668490; FAX: 0245 668490; Director General : 0723 661064 parci_moreni2002@yahoo.com Teis street, nr. 16 D, Moreni, Dambovita County, 135300, Romania Tel: 0040-245-668-490 Email: parc_moreni2002@yahoo.com Website: www.parcindustrialmoreni.ro

Details of textile and garment associations, investment promotion agencies, key Ministries etc.

Ministry of Economy, Energy and Business Environment Government of Romania	Patronage Federation of Textile, Clothing and Leather
Victoriei Avenue, nr. 152, Sector 1, București, cod 010096 Tel: 0040-21-202-5106/ 0040-21-202-5311	George Enescu street, nr.27-29, UGIR-1903 Palace, 010303, Sector 1, Bucuresti, Tel: 0040-21-3112-981, 0040-21-3112-982 Email: office@fepaius.ro, fepaius@fepaius.ro Website: www.fepaius.ro
Textile Industry National Association of Romania Tel: 0040-749-126-111 Email: contact@asociatiatextilistilor.ro Website: www.asociatiatextilistilor.ro	

Source: Embassy of India , Bucharest, Romania

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EXPERT SPEAKS**“Transforming the Korean Textile Industry”**

By Mr. Sang Woon Lee, Chairman of KOFOTI

The textile industry played a key role in Korean development until the sector lost his global competitiveness in the 1980s, forcing many companies to move production overseas. Today’s industry is well known for high quality textile goods and trending designs produced at reasonable prices thanks to a fully integrated industry with high technological standards and excellent manpower. Nevertheless, the country’s brand-power lags behind developed countries while its cost advantage lags behind developing countries. The 4th industrial revolution must be embraced to overcome these challenges in the country. The industry can adapt to the post-COVID-19 new normal and improve sustainability thanks to innovation (citing the example Korean fibers made from recycled plastic).

A push toward transforming the textile and fashion industry

The main forces for change in the global textile industry are an increasing uncertainty about the post-Covid-19 economy, rising protectionism, climate change and sustainability. Digitalisation (especially artificial intelligence and the use of digital platforms) is a strong push for transforming the textile and fashion industry.

Super-connectivity

A new form of societal organisation can be foreseen where all goods and services are exchanged via digital platforms. This would create new regional dynamics and help alleviating poverty through the gig economy. Innovation in cloud computing and 5G technologies should give rise to this vision but we need to be aware of its caveats. The digitalisation gap might well strengthen societal division by intensifying disparities in information, personal relations, social life, commercial ties, and living standards.

Rising robots

The current disruption in the global value-chain (consequent of the COVID-19 pandemic) encourages reshoring of manufacturing industries – a trend made profitable in advanced economies thanks to tech-driven innovations. A study from Oxford Economics, says that

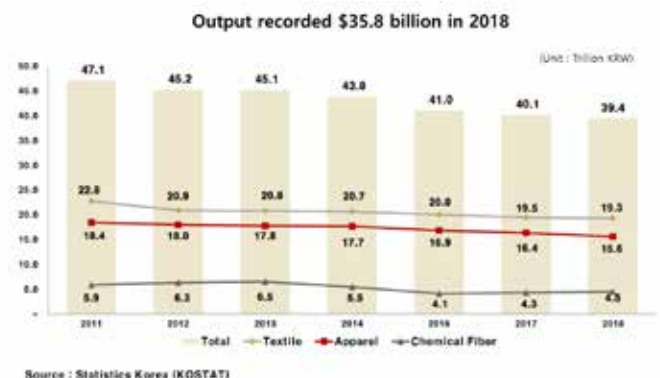
1 robot can replace 1.6 workers. The authors estimated that 20 million robots will be adopted worldwide in manufacturing by 2030. This means that 800 million workers (or 20% of work force) will be replaced by robot by then. AI robots (i.e. robots making use of artificial intelligence) “can perform delicate and flexible jobs in the manufacturing process and will evolve smarter every day with the data accumulated from everyday operations”. The textile and apparel industry will also benefit from further innovations such as 3D body scanning, bespoke pattern generation, 3D drape simulation, or augmented reality/virtual reality mirrors.

Drastic actions for sustainability

The pressure on sustainability is coming from every direction of the society. There is a need to take substantial actions for solving the plastic waste pollution. Historically, plastic waste was recycled back to plastic bottles or used to produce fashion goods. Today, it can also be used as alternative fuel in cement production in a process that decomposes the waste into its original elements (i.e. carbon dioxide, hydrogen, oxygen, and water) without producing any other materials such as dioxin. “Korea wants to be at the forefront of cleaning up ocean plastic pollution and creating a plastic-waste-free future”.

The Korean textile and apparel industry in numbers

The Korean textile and apparel industry started with a goal of self-sufficiency after the Korean war in the 1950’s. It has evolved into a high-fashion industry with technical textile and smart textiles. The Korean government



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email: ravikumar@texprocil.org

TRADE NOTIFICATION

ATUFS - Revised Guidelines

E-Serve No.: 250 of 2020 | : Date: December 04, 2020
Circular No. EPS/104/2020-21 To: Members of the Council
Sub : ATUFS – Revised Guidelines

Dear Member,

The office of the Textile Commissioner has notified revised guidelines for the ATUF Scheme vide Circular No. 98 dated December 1, 2020.

The modifications are as follows:

(i) Installation and commissioning of the machinery covered under UID shall be done within two years from the date of sanction of term loans subject to the submission of documentary evidence that the order for the machinery was placed within one year from the date of sanction of term loan for verification by JIT during inspection of machinery.

(ii) UID issued under the scheme shall be cancelled in cases where the applicant fails to submit intimation

of installation of machinery within two years from the date of sanction of term loan for undertaking physical verification by the JIT.

(iii) The minimum repayment period of the term loan sanctioned for availing the benefit of the scheme shall not be for less than three years including moratorium period.

A copy of Circular No. 98 dated December 1, 2020 has been circulated by the Council for your information.

You are requested to please take note of the above and do the needful.

In case, you need any clarification, please get in touch with Shri A.Ravi Kumar, Joint Director, TEXPROCIL.

Regards,

Dr. Siddhartha Rajagopal

Executive Director

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EXPERT SPEAKS Contd...

“Transforming the Korean Textile Industry”

By Mr. Sang Woon Lee, Chairman of KOFOTI

Korea's Textile and Apparel Trade Volume(2019)
 - Export : US\$ 12.9 Bil., Import : US\$ 17.1 Bil.



Source : Korea International Trade Association

supported the formation of regional clusters by financing local R&D and education. Nevertheless, the textile and apparel output steadily declined by about US\$10 million a year for 10 years.

“The Korean textile and apparel industry was one of the strong hard currency earning industry to the nation until 2011”, but exports declined fast in recent years, imports increased steadily, and the trade deficit for the sector grew to over US\$4 billion.

Korea's investment strategy

The county invested US\$10 billion in overseas projects in 2019 (mainly in Asian countries and Central America) but this trend is now declining to due to the COVID-19 pandemic and the US-China conflict.

Korea is in a good place to address the challenges currently facing the textile industry thanks to an advanced environmental and socially well organised industrial system. In particular, advanced IT technologies are an advantage for the digital transformation of the Korean textile and apparel industry. The sector will find new opportunities by working at solving the current challenges.

Source: This article is based on the presentation made by: Mr. Sang Woon Lee, Chairman of KOFOTI at Hybrid ITMF Annual Conference 2020 and its transcript by Dr Olivier Zieschank, Economist, ITMF.

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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.

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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