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The Synthetic & Rayon Textiles
Export Promotion Council

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CHAIRMAN AND EXECUTIVE DIRECTOR ATTEND MEETINGS ON EFTA RULES OF ORIGIN AND NEW TEXTILE POLICY IN NEW DELHI



Shri Ronak Rughani, Chairman, SRTEPC(right) in discussion with Shri Bipin Menon, Addl. DGFT (left) at the Meeting on EFTA Rules of Origin

Shri Ronak Rughani, Chairman, Shri S. Balaraju, Executive Director and Shri S. P. Katnauria, Regional Director, New Delhi attended a meeting regarding EFTA Rules of Origin held under the chairmanship of Shri Bipin Menon, Addl. DGFT on 17.12.2019 in New Delhi.

Shri Menon gave a brief presentation about EFTA and informed that 17 rounds of negotiations have been held till date. While the first round was held on 7th October, 2008, the 17th round was held during 18-21 September, 2017. The main tracks are tariff modalities, Rules of Origin, services, investment promotion and IPRs. DVC was held on 12.11.2019 to discuss Rule of Origin.

With regard to De-Minimis Shri Menon informed that non-originating materials do not have to fulfill Product Specific Rule (PSR), provided that their total value does not exceed 10% of the FOB/ex-works price of the product, and the maximum value of non-originating materials set out is not exceeded. With regard to man-made staple fibre (Chapter 55), he said that we could agree to the PSR of CC/CTH since CTH is the main process. Moreover, value addition needs to be 35%.

Shri Rughani mentioned about export and import data in respect of EFTA countries. He said that there is no threat from EFTA countries in so far as import from these countries is concerned.

Shri Rughani, Shri Balaraju and Shri Katnauria also attended a meeting regarding framing of new Textile Policy on MMF held under the chairmanship of Shri Sanjay Sharan, Joint Secretary on 17.12.2019.

The following issues were discussed during the Meeting :

- Fibre Neutrality: The value chain in textile and apparel sector has differential tax treatment which has created needless distortions. A major concern area has been the historical discrimination of man-made fibres and textiles against cotton and cotton textiles in the form of higher duties. GST on MMF and MMF textiles are higher as compared to Cotton. While GST on Cotton is uniform at 5% across its entire value chain, the rates on MMF textiles are 18%, 12% and 5% on fibre, filament/spun yarn and fabrics respectively which has led to inverted duty structure in MMF textile value chain.



Shri Sanjay Sharan, Joint Secretary, Ministry of Textiles (fifth from left) with Shri Ronak Rughani, Chairman, SRTEPC (third from left), Shri S. Balaraju, Executive Director (extreme left), Shri Hemant Kumar Nanda, Director, Ministry of Textiles (fourth from left) and other stake-holders of the MMF textile industry.

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EXECUTIVE DIRECTOR, SRTEPC ATTENDS MEETING WITH THE HON'BLE UNION MINISTER OF COMMERCE & INDUSTRY



Shri S. Balaraju, Executive Director, SRTEPC at the Meeting chaired by the Hon'ble Union Minister of Commerce & Industry, Shri Piyush Goyal

Shri S. Balaraju, Executive Director, SRTEPC and Shri S. P. Katnauria, Regional Director, New Delhi attended meeting regarding Review of Foreign Trade Policy and performance of Export Promotion Councils held under the chairmanship of the Hon'ble Union Minister of Commerce & Industry, Shri Piyush Goyal on 19th December 2019. Representatives from 37 EPCs/Commodity Boards etc. were present at the Meeting. At the outset the Commerce Secretary (CS) Dr. Anup Wadhawan welcomed the participants to the meeting and informed about the purpose of the meeting. The Commerce Secretary said that exports have seen a sharp decline during the current year and the data received till November, 2019 suggests that there has been a fall of 4% as compared to the previous year. He attributed the fall in exports to the global economic slow down. Dr. Wadhawan lauded the efforts of the exporters.

Shri Piyush Goyal, Hon'ble Union Minister of Commerce & Industry requested all present to brief about the export scenario of their sector during the last six months. He informed that the Government has been taking action to overcome the crisis. He asked the stake-holders present to point out the remedial measures being carried out by the Ministry which have not been effective in curtailing the fall in exports.

The members present cited GST refund, customs/shipping bills, declaration of exporters as risky exporters, harassment by banks, high interest rates on loans, regulation of yarn prices, extension of MEIS, RoSCTL, extension of MAI scheme to the buyers from non-MAI countries, etc. as some of the problems being faced by the exporters which in hindering the exports.

The Executive Director, SRTEPC briefed about the status of export in the MMF segment and informed that Council has already presented the problems encountered by the MMF textile exporters in writing to the Ministry, He has suggested for global branding of MMF textile products, changing of perception about the MMF products in the international market, treatment of merchant exporter at par with the manufacturing exporter, ADD imposed by Peru and Turkey, lack of effective coordination between DGFT and Customs in respect of Duty Drawback matters etc. to which Shri Piyush Goyal asked to give specific cases in respect of customs related issues. He also asked for details of ADD cases relating to Peru and Turkey.

The Hon'ble Union Minister of Commerce & Industry assured that the Government would see to it that the exporting community receives money at reasonable rates. He mentioned that the Merchandise Exports of India Scheme (MEIS) will be extended upto 31st March 2020 and will be phased out after that. The Hon'ble Union Minister of Commerce & Industry asked all EPCs to give information about the exporters declared as 'risky exporters' to the Ministry latest by 31.12.2019 by email at vijay63@nic.in in the format which will be circulated. He also informed that issues may also be sent to the Ministry as well as to him through SMS at his Mob. No. 9821082544. Shri Goyal also asked to give details of those GST refund cases which have already been approved but the money has not been received. The details be given in the same format.



Shri Piyush Goyal, Hon'ble Union Minister of Commerce & Industry addressing the representatives EPCs/Commodity Boards, etc.

Further the Hon'ble Minister said that the EPCs which have exports below US\$ 3 bn should be considered for merger. He said that the assessment of EPCs should be done to see that there is no overlapping which should be rationalised. He also asked exporters to join sector specific EPCs and also directed the FIEO not to enroll product-specific exporters as members and asked them to only enroll in case an export product is not covered by any EPCs/ Commodity Boards.

The Hon'ble Union Minister of Commerce & Industry said that suggestions regarding SEZs, should be reported to the Ministry within three days. He also asked that harassment at any quarter should be reported to the Govt.



MESSAGE FROM THE CHAIRMAN



I am glad to inform that Council's participation in Vietnam International Textile & Apparel Accessories (VITA TEX) in Vietnam from 20th to 23rd November 2019 was a success. Twenty companies from the Council along with 10 companies from Texprocil and 30 from FICCI were allotted booths in the "India Pavilion". The four-day event evoked fair response from the Vietnamese buyers and according to the preliminary feedback received most of the participants from the Council have been successful in establishing contacts and receiving trade enquiries which are under negotiation. I would like to express my gratitude to the Consul General of India in Vietnam, Dr. K. Srikar Reddy and Mrs. Nguyen Thi Van Nga, Director General of Ministry of Industry & Trade's Agency for Southern Affairs, Government of Vietnam for inaugurating the "India Pavilion" at the Exhibition. I am also thankful to the entire team of Consulate General of India in Vietnam for their patronage and support in organizing the Exhibition. Their help and assistance ensured that the arrangements were in place during the Exhibition.

Friends, we are in the last leg of the year 2019. So far, the year has not been favourable especially for the exports of textiles in general and particularly for the MMF textiles. This is a cause of worry to the entire industry for which all the stake holders and concerned including the Government are working on finding remedial measures. In this regard, the Hon'ble Union Minister of Commerce & Industry and Railways Shri Piyush Goyalji had called several Meetings with the industry stake-holders and one of these was held on 19th December 2019 to ascertain the cause of falling exports and to find out ways & strategies to arrest falling exports. The fall in exports was attributed to the global slowdown during 2019. The Commerce Secretary however, lauded the efforts of the exporters for carrying on with the good work even during such adversities. I am happy to share with you the good news that the Hon'ble Union Minister of Commerce & Industry, Shri Piyush Goyalji has informed that MEIS is being extended till 31st March 2020.

I request member-exporters not to let the situation dishearten them; indeed these are trying times but our resilience and efforts would definitely show positive results and things will brighten up in the New Year. We also have to look out to new avenues whether it is a market such as LACs, Africa, CIS or product portfolios such as Technical Textiles, Active wears, etc. that has tremendous potential to enhance our exports. The Government on its part is also encouraging exporters to venture into these fields in order to help our exports to sustain growth. Technical textiles also have a great future in the domestic market as well as in the overseas arena. Understanding the importance of this emerging Technical Textiles segment, SRTEPC held a Seminar on 3rd December 2019. The Seminar gave valuable information and insights to the participants on technical textiles including helping them understand the technical textile market, advantages of manufacturing, exports, etc.

The Council proposes to hold similar Seminars in the textile hubs of the country to educate their members as well as bring more companies under the fold of the Council. Towards this endeavour the Council has targeted the Southern region and will be holding Seminars in the Rajapalayam tentatively on 21st December 2019 and Erode on 23rd December 2019. I am certain that these Seminars will help and guide them in their export trade.

The Council also participated in 17th edition of "Garknit-X" held at Kolkata. The 3-day Int'l. Trade Fair is one of the largest Shows in the Eastern India. Council's participation in the Fair helped in publicizing and promoting Council and Council's activities among the textile community of Kolkata and its neighbouring cities.

I would like to inform you that the Council will be holding its Annual Export Award Function on 8th February 2020 at Hotel Sofitel, Mumbai. Smt. Smriti Zubin Irani, Hon'ble Union Minister of Textiles has already consented to be the Chief Guest on the occasion and present the Awards. I seek your whole hearted support and guidance to make the occasion an eventful one.

I take this opportunity to wish all the members a VERY HAPPY AND PROSPEROUS NEW YEAR.

Yours sincerely,

RONAK RUGHANI
CHAIRMAN



SRTEPC ORGANIZES PARTICIPATION OF MEMBER-COMPANIES IN VITA TEX IN HO CHI MINH CITY, VIETNAM



Mrs. Nguyen Thi Van Nga, Director General of Ministry of Industry & Trade's Agency for Southern Affairs; Dr. K. Srikar Reddy, Consul General of the Indian Consulate; Dr. Sidhartha Rajagopal, Executive Director of TEXPROCIL and Mr. Pankaj Verma, FICCI inaugurating the 'India Pavilion' at VITA TEX.

Introduction

As part of the Export Promotion Programmes of our Government for the year 2019-20, the Council organized participation of 20 member-companies in Vietnam International Textile & Apparel Accessories (VITA TEX) in Vietnam from 20th to 23rd November 2019 in association with Embassy of India and its Consulate and the Organisers of the Fair - Yokers Trade & Marketing Service Co. Ltd./ Chan Chao International Co. Ltd. in Ho Chi Minh City, Vietnam. Around 520 companies from 17 countries such as China, U. K., India, Taiwan, Germany, Hong Kong, South Korea, Malaysia, France, Nigeria, Romania, Singapore, Turkey, Bangladesh and Thailand showcased their products for discussing business with their target customers.

India Pavilion :

The India Pavilion constituted a total number of 60 member-companies collectively from SRTEPC (20), TEXPROCIL (10) and FICCI (30). In order to get focused attention of visiting buyers at the crowded International Fair, all the participating Indian companies were accommodated in a demarcated area by creating an "India Pavilion". The "India Pavilion" put up during the Exhibition, where Council's member-companies exhibited their products, was well supported by the Indian Consulate in HCMC. The complete range of their textile items displayed included different varieties of Fabrics, Yarns, Knitted Fabrics, Home Furnishings to discuss business with them. A separate "SRTEPC Booth" at the India Pavilion was also arranged with designer Fascia -- highlighting India, its massive production capacity and the complete range of textiles that are being exported from India to more than 150 countries.

Inauguration

Though VITA TEX 2019 was inaugurated at a Platform, which was located at a separate Pavilion by the Organizers of the Fair, participation of companies in the India Pavilion was also

inaugurated separately by the Consul General and Director General of Ministry of Industry & Trade's Agency for Southern Affairs. The foreign Dignitaries, who cut the inauguration Ribbon at the "India Pavilion" for opening the Exhibition included Mrs. Nguyen Thi Van Nga, Director General of Ministry of Industry & Trade's Agency for Southern Affairs. From the Indian side, Dr. K. Srikar Reddy, Consul General of the Indian Consulate, Dr. Sidhartha Rajagopal, Executive Director of TEXPROCIL, Mr. Pankaj Verma, FICCI did the Ribbon Cutting Ceremony of the India Pavilion.

Response to the Exhibition

The Council had been organizing participation of its member-companies in exclusive Indian Textile Exhibitions as well as Stand Alone Exhibitions in Vietnam since the last 16 years.

The 4-day Exhibition (at VITA TEX) in HCMC had on display, a large range of synthetic, rayon and blended textile items including different varieties of yarn and fabrics and home furnishings.

The "India Pavilion", which accommodated the participation of Indian companies in VITA TEX was visited by representatives of Garment Manufacturing Companies, Textile Traders & their Agents, and others connected with the Vietnamese Textile Industry & Trade.

Feed-backs of the participants showed that barring some, most of the participating companies managed to establish some contacts, and received few trade-enquiries which are under negotiation.

Publicity & Promotion

While the organizers promoted and publicized the event extensively through Newspapers/Trade Magazines advertisements, Television commercials, Hoardings at important locations in Vietnam, the Council also publicized the participation of the Indian companies at VITA TEX through The Consulate



Ms. Kalavathi Rao, Executive, SRTEPC addressing the Presentation Meeting held prior to the B2B Meetings at the Exhibition

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Important Meetings with Government of India during November/December 2019

Chairman, Executive Director and Regional Director, New Delhi attended meeting regarding EFTA Rules of Origin held under the chairmanship of Shri Bipin Menon, Addl. DGFT on 17.12.2019. Shri Menon gave a brief presentation about EFTA. He informed that 17 rounds of negotiations have been held. While the first round was held on 7th October, 2008, the 17th round was held during 18-21 September, 2017. The main tracks are tariff modalities, Rules of Origin, services, investment promotion and IPRs. DVC was held on 12.11.2019 to discuss Rule of Origin. Chairman mentioned about export and import data in respect of EFTA countries. He said that there is no threat from EFTA countries in so far as import from these countries is concerned.

Chairman, ED and RD, New Delhi attended a meeting regarding framing of new Textile Policy on MMF held under the chairmanship of Shri Sanjay Sharan, Joint Secretary on 17.12.2019. Issues discussed at the Meeting were fibre neutrality, focus on value addition (Finished goods), Economies of scale, Promote R&D for indigenous development of high performance and specialty fibres. Promote India as an investment destination and attract FDI in this sector, Protection of domestic industry from cheap imports, Strategic Branding of Indian MMF textiles, FTAs with European Union, Rules Of Origin, etc.

Executive Director and Regional Director, New Delhi attended meeting regarding review of Foreign Trade Policy and performance of EPCs held under the chairmanship of Shri Piyush Goyal, Hon'ble Union Minister of Commerce & Industry on 19.12.2019. Representatives from 37 EPCs/Commodity Boards etc. were present. The Commerce Secretary welcomed the participants to the meeting and informed about that exports were under stress during the current year and that in November, 2019, the exports were down by 4% as compared to the last year. He said that this is a part of the global economic slow down. He complimented the exporters for their efforts. The Hon'ble Minister requested the participants to inform about the export scenario of each sector during the last six months. Accordingly, Executive Director, SRTEPC informed about the status of export in the MMF segment. He also mentioned that the Council has presented the issues hampering exports of MMF textiles in writing to the Ministry,

Joint Director (MR) and Regional Director, New Delhi attended meeting regarding strategy for increasing exports held under the chairmanship of Shri Keshav Chandra, Joint Secretary 27.11.2019. The meeting was held with representatives of SRTEPC, TEXPROCIL and PDEXCIL. The Joint Secretary asked to prepare a list of top 100 exporters and talk to them and find out the problems / issues and report the same to the Deptt. of Commerce at the end of every month by 27th-28th in the proforma circulated by them. The Joint Director (MR) explained the status of MMF textiles exports during April-September, 2019 i.e. growth in respect of fabrics and decline in respect of Fibre, yarn and made-ups. He cited the reasons for decline in exports such as increasing raw material cost, lack of global branding, inverted duty structure, high interest rates, infrastructural bottlenecks, non-extension of RoSCTL to fibre/yarn/fabric, non-extension of MEIS benefits to the entire value chain, lack of awareness among foreign buyers about Indian textiles, etc. The JD (MR) and RD, New Delhi also met Ms. Sherry Lal Thangzo, Economic Advisor, MOT and discussed with her in detail the issues relating to GST/Inverted Duty Structure and treatment of merchant exporters at par with the manufacturing exporters, non-refund of inputs services and embedded taxes. She requested to send the issues in writing giving background and justification in detail.

Joint Director (Branding) and Regional Director, New Delhi attended meeting of the Sub-Committee regarding consideration of MAI proposals for the year 2020-21 held under the Chairpersonship of Smt. Nidhi Mani Tripathi, Joint Secretary, Department of Commerce on 06.12.2019. The Joint Director informed that under each scheme of the GOI, 10 % of the budget is to be spent on the SC/ST. She requested to give suggestions as to how funds may be utilised for this purpose. She said that each EPC should identify 1-2 core events globally which should be submitted through MOT/EP (Textiles), DOC and such proposal (s) should be accompanied with a concept note. Council submitted the recommended proposals for approval by the Empowered Committee, DOC.

Regional Director, New Delhi attended meeting chaired by the Commerce Secretary regarding organizing of Annual Mega Shopping Festival on 29.11.2019. Representatives of GOI (DOC, DGFT, MSME, Ministry of Culture, Ministry of Tourism, Ministry of Rural Development, Deptt. of Aayush, Ministry of Finance-GST/CBEC etc.), States (Gujarat, Karnataka, Kerala, Tamil Nadu, West Bengal etc.), ITPO and EPCs were present. A presentation was made by the ED, ITPO. He informed that the objective of the Mega Shopping Festival is to promote Brand India, promote sales, strengthen each product category and B to B / B to C etc. events. The focus sectors will be Gems & Jewellery, Textiles, Handicrafts, Leather & Non Leather, Carpets and Yoga & Ayurvedic products. He informed that the funds will be raised

through sponsorships but initial amount of Rs. 50 crore towards branding and publicity may be provided by DOC. He further informed that Organising Committee, Organising Sub Committees and Sectoral Committees will be constituted to monitor the events. It was to hold the first one at Ahmedabad (Mahatama Mandir) from 7th to 21st January, 2020 coinciding with the Kite Festival there and the second one at Bengaluru in March, 2020. The dates for Bengaluru event are to be confirmed by the representative of Karnataka. Next two events may be held at Kolkata and Chennai post monsoon 2020.

Regional Director, New Delhi attended preparatory meeting regarding India – Nigeria JTC meeting on 09.12.2019 under the chairmanship of Shri Praveen Kumar, Joint Director, DOC. Shri Kumar asked all present to intimate non-tariff issues, if any. Regional Director informed that there are no non-tariff issues. However, the Council has proposed to take up the following two issues in the forthcoming meeting of India-Nigeria JTC one being signing of MoU with Nigeria for making India a supply chain partner for Nigeria's requirements of MMF textile products; and cooperation with Nigeria for the development of Nigeria's spinning and garmenting segment and in turn India may ask Nigeria to import MM fibre/filaments, MMF fabrics etc.

Regional Director, New Delhi attended another meeting regarding setting up of Warehouses/Display Centres abroad on 09.12.2019 held under the chairmanship of Shri Keshav Chandra, Joint Secretary, DOC. Shri Chandra asked the representatives of the EPCs to inform about their proposals to set up of Warehouses/Display Centres abroad. RD, New Delhi informed that SRTEPC has proposal to set up Warehouses in Vietnam and Russia and Showrooms in Kabul, Afghanistan. He informed that for this purpose the Council proposes to hire a professional agency to understand various issues such as finding suitable place, Govt. policies in these countries etc. and for preparing implementation roadmaps. Shri Chandra said that the proposals in this regard may be worked out with proper data analysis and sent within three weeks. He said that the EPCs may consult each other and join together to set up Warehouses/Display Centres.

Regional Director, New Delhi attended stakeholders meeting regarding technology gaps in the textile machinery chaired by Smt. Smriti Zubin Irani, Hon'ble Union Minister of Textiles on 18.12.2019. The Hon'ble Union Minister of Textiles asked to set up a Group comprising an Additional Secretary level officer from the MOT, Textile Commissioner and representatives from the Deptt. of Heavy Industry, PDEXCIL, SRTEPC, TEXPROCIL, AEPC etc. to find out technology gaps in textile machinery, including technical textiles, and suggest ways towards manufacturing of textile machinery in India. She said that technical textile zones should be set up.

INPUTS OF COUNCIL ON BILATERAL TRADE SENT TO MINISTRIES, GOVERNMENT OF INDIA

4th Meeting of India-Colombia Joint Business Development (JCBD)

The inputs of the Council, such as a brief analysis of Bilateral MMF textiles trade between India and Colombia, during the past five years, potential for MMF textiles in Colombia and inputs on the issues for greater textile cooperation between India and Colombia were sent to the Ministry of Commerce and Industry.

Issues/Non-Tariff Barriers for Preparation of Talking Points for Hon'ble Minister of External Affairs

The inputs of the Council on Non-Tariff Barriers imposed by various countries pertaining to the WANA on India's MMF textile exports were prepared and sent to the Ministry.

CS visit to Rajasthan on 11-12-2019

As desired, the inputs of the Council, such as detailed information about major textile products of Rajasthan and information relating to some of the major textile units based in Rajasthan were sent to the Ministry.

Joint Action Group (JAG) for MSME Export Promotion and Indigenization

The suggestions of the Council as per the feedback received from member-exporters were prepared and sent to the Ministry for suitable consideration.

India-US Trade Issues – reg

The inputs of the Council, such as brief analysis of trade potential in USA for Indian MMF textiles exports in view of ongoing trade war between China and USA, Non-tariff Barriers (NTBs), High Import Duty, GSP, Anti Dumping Duty imposed by the USA on Polyester Textured yarn, along with a note on the issues for greater textile cooperation between India, US etc. were sent to the Ministry of Commerce and Industry.

10th Session of the India-South Africa Joint Ministerial Commission

As desired, inputs of the Council, such as a brief analysis of Bilateral MMF textiles trade between India and South Africa during the past three years, potential for MMF textiles in South Africa and inputs on the issues for greater textile cooperation between India and South Africa were sent to the Ministry.

Framing of New Textile Policy for Man Made Fibre

A Concept Note on how to promote Manmade Fibre Textiles was prepared and sent to the Ministry.

1st Session of India-Norway Dialogue on Trade and Investment (DTI)

The inputs of the Council, such as a brief analysis of the bilateral MMF textile trade between India and Norway and the potential for MMF textiles in Norway, along with a note on the issues for greater textile cooperation between India, Norway etc. were sent to the Ministry of Commerce and Industry.

EFTA Rules of Origin-inputs requested

The inputs of the Council, relating to India-EFTA Trade in MMF textile products during the past five years along with the Council's views on the proposed Rules of Origin were sent to the Ministry.

Man Made Fibre Study Textiles Committee

As desired, the inputs of the Council to promote growth of Man Made Fibre and Textile Industry in India, along with suggestions on MMF textile industries for incorporation in the reports, were sent to the Textile Committee.

Attention : Members**INDIAN TRADE CLASSIFICATION (HS) CODES FOR MAN-MADE FIBRE TEXTILES**

A detailed ITC HS Code Book for Indian Man-made Fibre textiles is available with the Council. The Book contains Chapter-wise (54 to 63) HS Codes for the following Products.

- Fabrics
- Yarns
- Made-ups
- Fibre

The Book is available for Rs. 118 (including GST), which can be obtained from the Head Office or Regional Offices of the Council at Delhi and Surat on payment by cash or on the receipt of Demand Draft (in favour of "The Synthetic & Rayon Textiles Export Promotion Council, Mumbai) for the requisite amount. Please add Rs.50/- for mailing charges, if you require the Book through courier.

Russia

Technical textiles production double in the last seven years

Production of technical textiles including innovative textiles products has more than doubled in Russia over the past seven years, and continues to grow.

It is learnt that this year the growth of production will not be less than 10%, and comparable to the figures of the previous four years. This is mainly due to the ever-growing domestic demand for technical textiles and innovative textile products and their consumption in the local market.

According to data, in general the production of technical and innovative textiles in Russia almost doubled during the period of 2011-2018 and exceeded RUB 76 billion (US\$1.18 billion) in value terms last year, a record figure in the modern history of Russia. It is predicted that this year the share is expected to reach 40% of the entire market, compared to 33-35% at the beginning of 2010s.

In the case of maintaining of the current growth rates of the market and a further growth of the local demand, domestic manufacturers will be able to occupy at least two thirds of the national market for technical textiles and nonwoven materials already by the mid-2020s.

It is also believed that the number of projects, which involve the production high-tech textiles products in Russia has significantly increased in recent months. One such project involves the production of Russia's first innovative production of polymer-coated multilayer technical textile materials.

It is believed that the Russian technical textiles industry will continue its growth in years to come, while a particular attention will be paid to the increase of the production of health-saving textile materials, including those, which contain nano, bio and modified chemical fibres new generation heaters and heat-insulating fireproof nonwoven materials. That will involve the conduction of more active R&D activities in this field.

Source :<https://www.innovationintextiles.com/>

Vietnam

Textile/garment industry to reach target of US\$40 billion

Vietnam's domestic textile and garment industry is still striving to reach its export revenue target of US\$40 billion this year despite facing several difficulties. The industry needs export value growth of at least 11-12 per cent for the rest of the year to achieve this target.

Garment-textile sector growth was only 9.1 per cent in the third quarter, much lower than the same period in 2018, the association said. However, it was higher than other textile producers including China, India and Bangladesh.

The association is hoping textile enterprises will be able to deliver big orders to push export value up this month.

Canada holds a lot of potential for Vietnam with import value of textiles and garments reaching more than US\$13 billion each year, while the latter's textile and apparel exports to this market are worth only about US\$550 million per year.

Vietnam does not have a free trade agreement (FTA) with Canada, and therefore, the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) opens the door for its textile and apparel products.

Source : Fibre2fashion

Philippines

Textile industry roadmap to make it one of the top ten global players

The Philippines garment and textiles industry roadmap sees the Philippines become one of the top ten global players with annual exports growth of 45 percent should it implements some recommendations including elimination of the popular "ukay-ukay" (used imported clothing) that proliferates anywhere in the country and the utilization of natural fibers.

At the industry forum and launch of the Textile-Garments Industry Roadmap, the plan covering 2020-2029 was divided into three milestones: short-term (2020-2022), medium term (2023-2025) and long-term (2026-2029).

Under the short term milestones, the Philippines should already be among the top 20 garment exporters with annual growth of 12.3 percent in garment exports and 3-5 percent increase in textile exports. This should be made possible with the increase in the utilization of natural and synthetic textile fiber by 5-10 percent.

Under this milestone, the government was urged to address smuggling and proliferation of "ukay-ukay" by strictly implementing RA 4653. The government must also reinstate the SGS pre-shipment inspection and to cancel business permits related to trading of used clothing. Incentives to the industry was also pushed in the short term for the innovative product processing that promotes sustainability and green environment. Reduction of the 12 percent value added tax was also pushed.

For the short term milestone, the roadmap forecasts the Philippines to improve its world ranking in garment exports into the top 15 largest globally. It is expected to increase its garments by 21.7 percent annually and 10 percent increase in natural and synthetic textile fiber.

This milestone has called for government to address infrastructure gaps and logistical bottlenecks. It also urged for production efficiency, transportation, communication and

distribution through high-quality infrastructure and logistical services.

Export market diversification must also be pursued with more bilateral free trade agreements with emerging markets to reduce dependency on the US and EU markets. Improved R & D must be pursued to come up with innovative products.

For the long-term, the roadmap said that an annual 45.8 percent annual increase in the exports of garments is attainable by 2026-2029. This milestone has foreseen the Philippines already at the top ten of the world's biggest garment exporters.

The Philippines is already a unique, well-known affordable and great for everyday wear global brand as the industry has already upgraded to original brand manufacturer with homegrown Filipino labels.

The industry has already a textile manufacturing that could fully support garment producers offering a more diverse range of products both for the local and export market.

Source : yarnsandfibers

China

Exports to US drop

Exports to the United States fell 23 per cent from a year earlier while imports of American goods were off 2.8 per cent according to the latest data.. This happened even when negotiators worked on the first stage of a possible deal to end a tariff war. Total Chinese exports were off 2.5 per cent from a year earlier while imports were up 0.2 per cent, said a report.

Source : www.eximin.net

Pakistan

Exports of readymade garments up during July-Oct 2019

Pakistan's export of readymade garments posted an increase of 12 percent to \$906.663 million in July-Oct 2019 from \$809.520 million in July-Oct 2018. Increase in readymade textiles now stands at \$97.143 million in July-Oct 2019. In term of quantity, export of readymade garments grew by 32 percent or 4.755 million dozens to 19.954 million dozens in July-Oct 2019 from 15.199 million dozens in July-Oct 2018.

In Oct 2019, the country exported 13.46 percent or \$28.395 million more readymade textiles to \$239.302 million comparing to their export of \$210.907 million in Oct 2018. Export volume of readymade garments also went up by 20.26 percent or 873,000 dozens to 5.182 million dozens in Oct 2019 from 4.309 million dozens in Oct 2018.

Source : <https://www.brecorder.com/>.

INFO SRTEPC ADVERTISEMENT TARIFF

Sr. No.	Advertisement	One issue	Three issues	Six issues	Twelve issues
1.	Advertisement Inside Half page (B/W)	4000	11000	21000	40000
2.	Inside full page (B&W)	8000	22000	42000	80000
3.	Inside half page (colour)	5000	12000	30000	65000
4.	Inside full page (colour)	9000	25000	48000	85000
5.	Front Inside Page(Colour)	10000	27500	50000	90000
6.	Back inside Page(Colour)	15000	42500	80000	150000
7.	Back cover Page (Colour)	20000	55000	105000	200000

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Full page area : 11" L x 8.5" W (Maximum)

Half page area : 5.5" L x 8.5" W (Maximum)

Customs to soon start faceless assessment of cargo

The Customs Department will take the ease of doing business initiatives to the next level by rolling out the concept of faceless assessment of cargo across the country over the next few months, whereby consignments will be assessed by a virtual group irrespective of where the Bill of Entry is filed.

A Bill of Entry is a document filed by an importer or an exporter specifying the nature, quantity and value of goods that have landed or are being shipped out.

The pilot has already been started in Bangalore. So, all machinery will be assessed by a virtual group no matter where the Bill of Entry is filed. In Chennai, it's already being done. It's a matter of a few months before it is rolled out across the country.

India's export-import trade has often complained that each seaport carries out assessment and examination in its own way, with Customs officers adopting complete divergence in practices.

The Customs Department could consider relaxing the Rs 10-lakh bank guarantee for logistics operators who are keen on acquiring the status of authorised economic operator (AEO) — an entity engaged in international trade and approved by Customs and compliant with supply chain security standards prescribed by the World Customs Organisation.

The Customs will ensure that if the exporters is compliant with all aspects and has given the stamp of an AEO, the bank guarantee which has been hindering functionality, will not be required

It is learnt that the World Customs Organisation is looking at how to leverage an AEO in multi-lateral and bi-lateral agreements between countries. As and when that happens, and if in the entire supply chain each one is an AEO, maximum benefits will accrue to it. That means that exporting and importing nations would have to have similar standards on that count

Customs played a key role in improving India's ranking in the ease of doing business, which jumped 14 places to 63 this year from 77 last year. This year, it is expected to jump another 12 places.

Recently, the Customs introduced the concept of document identification number while sending out letters to exporters and importers calling for hearing, seeking details, or issuing show cause notices. The genuineness of the document identification number can be verified by accessing the website of the Central Board of Indirect Taxes and Customs (CBIC).

Source : The Business Line

Target of US\$1 trillion in the next five years

The Hon'ble Union Minister of Commerce & Industry, Shri Piyush Goyal has said that there is a need to accelerate export growth to reach the target of US\$ 1 trillion in the next 5 years, and the Report of the High-Level Advisory Group shows the way in which this goal can be achieved.

The Minister said there was a need to look at ways to address the high cost of capital and the high taxation levels in the Indian economy. He noted that the government had already acted upon the latter, based on the Group's interim report, and the Finance Ministry had reduced the corporate tax rates.

The Minister also highlighted the need to diversify India's service exports so that we were not always dependent on IT/BPO exports. In addition, he stressed that the fear of FTAs needs to go and India needs to negotiate FTAs as a win-win situation for both sides. He added that there was also a need to promote manufacturing in the country and develop economies of scale.

For the past 7-8 years, India's trade has been stagnating at the over US\$ 300 billion level.

Source : www.eximin.net

Government to impose import curbs on 350 items

The government has identified over 350 “non-essential” imports — ranging from among others textile products — on which it intends to initiate a host of measures, including an increase in customs duty apart from putting in place quality control orders to reduce shipments into the country and encourage domestic manufacturing. In addition, departments are looking into suggestions of waiving the requirement for global tender for government procurement in sectors where it thinks there is sufficient domestic capacity to execute a contract, sources told TOI. Several ministries such as textiles, electronics and IT and commerce and industry have been asked to initiate action on the identified list of products.

As part of the initiative, public sector companies may also be asked to list out their requirement for products and specifications for the next five-six years so that domestic industry knows the demand and plan accordingly. So, if the standard changes, Indian manufacturers can tweak their production accordingly.

The moves are part of the government's thrust to 'Make-in-India' scheme, for which it has been working on ways to discourage imports. So far it has largely depended on an increase in import duty for a host of products, including television sets and mobile phones, which the government believes, has helped push domestic manufacturing. Ministers have repeatedly pointed to the domestic production and assembly of mobile handsets in recent years as a result of this policy.

Some of the duty hikes are expected to be announced in the budget, although midterm correction are not being ruled out.

It is learnt that the government will simultaneously pursue a strategy to seek investments from international players to locate manufacturing facilities in the country. Several economists have, however, warned against using high import duties as a tool to restrict imports, arguing that it impacts the consumer adversely, who has to shell out more. Besides, inefficient domestic manufacturers get protection.

Source : The Economic Times

MSMEs contribute half of the exports

Micro, Small and Medium Enterprises (MSMEs) contribute 29.7 per cent of GDP and 49.66 per cent of Indian exports. The government has taken various initiatives to enhance the competitiveness of MSMEs through schemes such as Credit Linked Capital Subsidy and Technology Upgradation Scheme (CLCS-TUS), Micro and Small Enterprises – Cluster Development Programme, Procurement and Marketing Support, and support for MSMEs to participate in international exhibitions/trade fairs, conferences/summits/workshops.

Source : <http://www.eximin.net/>

Textile exports up post GST says Textile Minister

The Hon'ble Union Minister of Textiles Smt. Smriti Zubin Irani has informed that the textile exports have increased 6.2% post-Goods and Services Tax (GST) as compared with corresponding period pre-GST.

She said that India faces competition from countries like Vietnam, Bangladesh and Sri Lanka which enjoy duty free access to key markets while India faces a duty disadvantage. Besides, Bangladesh and Vietnam have the benefit of scale in apparel manufacturing and a large and productive labour force she stated.

Source : The Economic Times

Anti-dumping duty to be imposed on MEG originating from five countries

The government may impose anti dumping duty on a chemical used in polyester fibres and films, imported from five countries as the Commerce Ministry has launched an investigation for the same. The ministry's investigation arm DGTR has initiated the probe into an alleged dumping of "Mono Ethylene Glycol" originating in or exported from Kuwait, Oman, Saudi Arabia, UAE and Singapore, following a complaint from a domestic company

Reliance industries Ltd has filed an application on behalf of domestic industry before the DGTR for initiation of the investigation.

According to a notification of the Directorate general of Trade Remedies (DGTR), the company has requested for imposition of anti-dumping duties on the imports. India Glycols Limited has also supported the application.

It said that the authority has prima facie found that there is sufficient evidence of dumping of the chemical from these countries.

In the probe it would determine the existence, degree and effect of alleged dumping, and consequent injury to the domestic industry. If established that dumping has caused material injury to domestic industry, the directorate would recommend the amount of antidumping duty.

The period of investigation is January - September 2019. It would also look at the data of 2016-19. Countries carry out anti-dumping probe to determine whether their domestic industries have been hurt because of a surge in cheap imports.

As a counter measure, they impose duties under the multilateral regime of the World Trade Organization. The duty is aimed at ensuring fair trade practices and creating a level-playing field for domestic producers

Source : The Economic Times

New duty on imports

The commerce department has asked the Finance Ministry to levy border adjustment tax (BAT) on imported goods to offset the impact of levies such as electricity duty, clean energy cess, levies on fuel and royalty that are not part of goods and services tax (GST).

The Commerce Secretary, Shri Anup Wadhawan has proposed to the revenue department that such taxes (which are not part of GST), while resulting in an increase in the cost of production of domestic goods, also place them on an unequal footing vis-a-vis imports rendering our exports uncompetitive

The commerce secretary has sought an urgent status report to brief the Hon'ble Union Minister of Commerce and Industry Shri Piyush Goyal on the proposal. Since taking charge six months ago, the Hon'ble Minister of Commerce & Industry has been seeking a series of steps to discourage imports, especially of "nonessential" items, to boost local manufacturing.

When GST was introduced in July 2017, a number of levies at the state and the central level were merged into it and some of the taxes, such as those imposed in mandis in Punjab and Haryana at the time of procurement, were done away with. While some of the levies are back in some form or the other, the commerce department is of the view that many were not included in GST, resulting in a situation where input credit on these taxes is not available.

As a result, two options were considered by the department, with the first one — to levy border adjustment tax — seen to be preferable.

This will require amendments to the Customs Act, with an elaborate exercise needed to put in place rules for identification and quantification of such levies. Officials said that the proposed additional tax of customs is compatible with World Trade Organization (WTO) rules as it can be imposed like taxes on domestic products or on an article from which the imported product is manufactured.

The second option is to allow for refund of non-creditable taxes, which many believe will be possible under Remission of Duties or Taxes on Export Products (RoDTEP). But that only addresses a part of the problem and does not benefit goods being sold in the domestic market.

Source : The Economic Times.

BANGLADESH: A MARKET WITH ENORMOUS POTENTIAL FOR EXPORTS OF INDIAN TEXTILES AND CLOTHING PRODUCTS

INTRODUCTION

Bangladesh is located on the Bay of Bengal bordered by India on all sides except for a small border with Burma. Bangladesh has flat plains, and most of the country is situated on deltas of large rivers flowing from the Himalayas. Bangladesh is a member of the Asia-Pacific Trade Agreement (APTA) and the South Asian Association for Regional Cooperation (SAARC). Bangladesh has the world's 39th largest economy in terms of market exchange rates and 29th largest in terms of purchasing power parity, which ranks second in South Asia after India. Bangladesh is also one of the world's fastest-growing economies and one of the fastest growing middle-income countries. The country has a market-based mixed economy. A developing nation, Bangladesh is one of the Next Eleven emerging markets. According to the IMF, its per-capita income was US\$1,888 in 2018, with a GDP of US\$314 billion. Bangladesh has the second-highest foreign-exchange reserves in South Asia (after India). Bangladesh's largest trading partners are the European Union, the United States, Japan, India, Australia, China and ASEAN. Expat workers in the Middle East and Southeast Asia send back a large chunk of remittances. The economy is driven by strong domestic demand.

Major industries include textiles, pharmaceuticals, shipbuilding, steel, electronics, energy, construction materials, chemicals, ceramics, food processing and leather goods. Most export earnings are from the garment-manufacturing industry.

BANGLADESH TEXTILE INDUSTRY

The textile and clothing industries provide the single source of growth in Bangladesh's rapidly growing economy. For Bangladesh exports of textiles and garments are the principal source of foreign exchange earnings. By 2002 exports of textiles, clothing, and ready-made garments (RMG) accounted for 77% of Bangladesh's total merchandise exports. In 1972, the World Bank approximated the gross domestic product (GDP) of Bangladesh at US\$6.29 billion, and it grew to \$173.82 billion by 2014, with \$31.2 billion of that generated by exports, 82% of which was ready-made garments. As of 2016 Bangladesh held the 2nd place in producing garments just after China. Bangladesh is the world's second-largest apparel exporter of western fast fashion brands. Sixty percent of the export contracts of western brands are with European buyers and about forty percent with American buyers. Only 5% of textile factories are owned by foreign investors, with most of the production being controlled by local investors. In the financial year 2018-19 the RMG exports contributed US\$34.13 billion to Bangladesh's total export earnings, growing by 11.49% compared to last fiscal year. According to Export Promotion Bureau (EPB) data, the RMG sector has contributed 84.21% to Bangladesh's total exports of US\$ 40.53 billion, growing by 10.55% in FY19. The figure-1 depicts that in last 5 years the RMG exports added additional 10 billion dollars in the export basket that means growing at a rate on average 2 billion each year. Though the growth rate is impressive it is too optimistic to reach 50 billion mark by 2021 which is the target set by the government of Bangladesh.

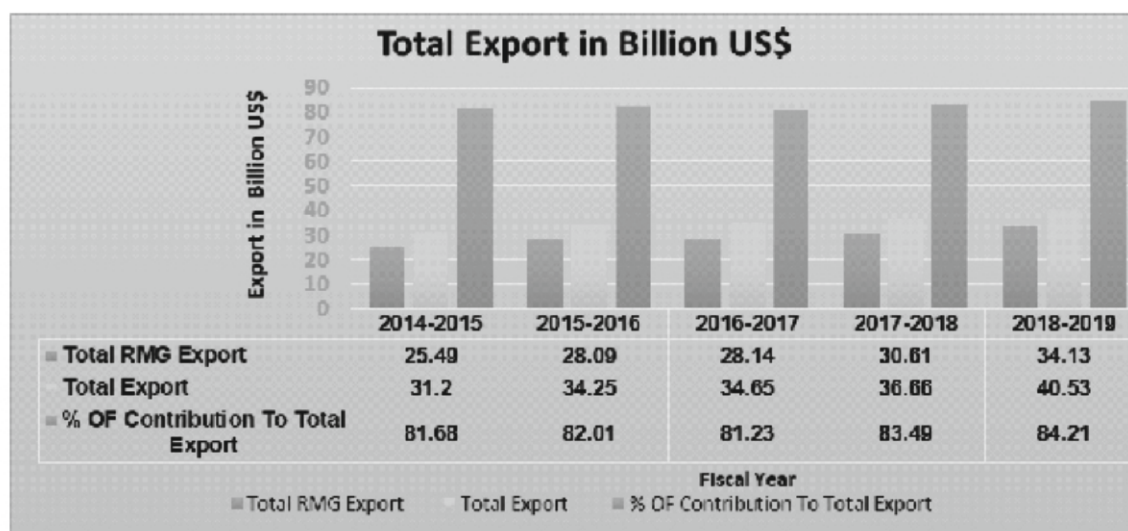


Figure-1: Bangladesh's total export earning with % of contribution

The export growth rate is 11.49% which was only 8.76% in 2017-18 indicates the upward trend of RMG export after the year in 2016-17 when the RMG export growth was the slowest at 0.2%. It has been observed that in the export basket of RMG from Bangladesh, RMG of woven fabrics were dominated and have grown substantially as compared to RMG of knit fabrics.

It is important to note that despite Bangladesh being the 2nd largest world exporter of RMGs, Bangladesh imports most of the raw materials such as fabrics, yarns, swing threads, etc. required for making the RMGs. Imports of these textile raw materials by Bangladesh from the world during 2018 were more than US\$ 13 billion in which India's was around 19% (US\$ 2.5 bn). Bangladesh's total imports of MMF textiles from the world during 2018 were US\$ 5.7 mn, of which India's share was only US\$ 355 million (6.23%).

Bangladesh is a highly potential market for MMF textiles and there is tremendous scope to increase exports of Indian MMF textiles to Bangladesh and increase our market share.

BANGLADESH'S TEXTILE AND CLOTHING IMPORTS FROM WORLD DURING 2018

Value in US\$ 000

Chapter	Product Description	Imports from World	Imports from India	India's Share (%)
50	Silk	6068	297	4.89
51	Wool, fine or coarse animal hair; horsehair yarn and woven fabric	71026	3141	4.42
52	Cotton	6896527	2035077	29.51
53	Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn	225601	4573	2.03
54	Man-made filaments; strip and the like of man-made textile materials	1392268	171419	12.31
55	Man-made staple fibres	1948705	162216	8.32
56	Wadding, felt and nonwovens; special yarns; twine, cordage, ropes and cables and articles thereof	159818	2371	1.48
57	Carpets and other textile floor coverings	17560	149	0.85
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery	463908	10335	2.23
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable . . .	368406	9092	2.47
60	Knitted or crocheted fabrics	1381793	67919	4.92
61	Articles of apparel and clothing accessories, knitted or crocheted	57630	5054	8.77
62	Articles of apparel and clothing accessories, not knitted or crocheted	172689	22552	13.06
63	Other made-up textile articles; sets; worn clothing and worn textile articles; rags	67569	14118	20.89
	TOTAL	13229568	2508313	18.96

Source: ITC,

PRODUCT WISE IMPORT OF MMF TEXTILES (CHAPTER 54 & 55) BY BANGLADESH – 2018

Value in USD' 000

HS Code	Product Description	Imported from World in 2018	Imported from India in 2018
540233	Textured filament yarn of polyester (excluding that put up for retail sale)	197972	60240
550320	Staple fibres of polyesters, not carded, combed or otherwise processed for spinning	175856	31525
550410	Staple fibres of viscose rayon, not carded, combed or otherwise processed for spinning	78665	15072
540244	Synthetic filament elastomeric yarn, single, untwisted or with a twist of <= 50 turns per metre ...	77407	1182
540247	Filament yarn of polyester, incl. monofilament of < 67 decitex, single, untwisted or with a ...	37142	4559
550810	Sewing thread of synthetic staple fibres, whether or not put up for retail sale	35913	654
550130	Filament tow as specified in Note 1 to chapter 55, acrylic or modacrylic	34215	0
540231	Textured filament yarn of nylon or other polyamides, with a linear density of <= 50 tex per ...	18703	200

Value in USD' 000

HS Code	Product Description	Imported from World in 2018	Imported from India in 2018
540110	Sewing thread of synthetic filaments, whether or not put up for retail sale	15868	2088
550340	Staple fibres of polypropylene, not carded, combed or otherwise processed for spinning	15392	34
540245	Filament yarn of nylon or other polyamides, incl. monofilament of < 67 decitex, single, untwisted ...	14871	0
540220	High-tenacity filament yarn of polyesters (excluding that put up for retail sale)	12484	669
540249	Synthetic filament yarn, incl. synthetic monofilament of < 67 decitex, single, untwisted or ...	12298	32
540232	Textured filament yarn of nylon or other polyamides, with a linear density of > 50 tex per ...	8514	55
550200	Artificial filament tow as specified in Note 1 to chapter 55	6522	0
540261	Multiple "folded" or cabled filament yarn of nylon or other polyamides, incl. monofilament ...	5757	107
540252	Filament yarn of polyester, incl. monofilament of < 67 decitex, single, with a twist of > 50 ...	4642	474
540251	Filament yarn of nylon or other polyamides, incl. monofilament of < 67 decitex, single, with ...	2389	26
550120	Filament tow as specified in Note 1 to chapter 55, of polyesters	2101	0
540248	Filament yarn of polypropylene, incl. monofilament of < 67 decitex, single, untwisted or with ...	1303	325
540219	High-tenacity filament yarn of nylon or other polyamides (excluding sewing thread, yarn put ...	1149	27
550330	Acrylic or modacrylic staple fibres, not carded, combed or otherwise processed for spinning	1129	1
540259	Synthetic filament yarn, incl. synthetic monofilament of < 67 decitex, single, with a twist ...	1075	314
540239	Textured synthetic filament yarn (excluding sewing thread, yarn put up for retail sale and ...	1005	28

Source: ITC

LEADING SUPPLIERS OF TEXTILE PRODUCTS TO BANGLADESH IN 2018

Sr. No	Country	Imports in US\$ '000
1	China	6829269
2	India	2480707
3	Taipei, Chinese	258057
4	Indonesia	219232
5	Thailand	209141
6	Korea, Republic of	169338
7	Viet Nam	161063
8	Japan	99583
9	Malaysia	73969
10	Austria	19950

Source: ITC

EXPORTS OF INDIAN MANMADE FIBRE TEXTILES TO BANGLADESH

Currently, exports of Manmade fibre textiles from India to Bangladesh is US\$ 355 mn which accounts for around 6% of total Manmade fibre textiles imported by Bangladesh from world. During last five years India's exports of Manmade fibre textiles to Bangladesh have witnessed average growth of around 10% (from US\$ 322 mn. to US\$ 355 mn)

Value in US\$ Mn

	Fabrics	Made-ups	Yarn	Fibre	Total	% Gr./Dec
2014-2015	204.27	2.94	50.36	64.83	322.40	-
2015-2016	186.11	4.02	63.22	84.40	337.75	4.76
2016-2017	198.95	3.98	72.73	88.95	364.61	7.95
2017-2018	198.25	6.47	66.98	82.76	354.46	-2.78
2018-2019	160.77	18.95	81.26	94.10	355.08	0.17

INDIA'S MAIN ITEMS OF EXPORT TO BANGLADESH DURING 2018-19

The major Indian MMF textile products exported to Bangladesh during 2018-19 were such as Polyester Viscose Fabrics, Polyester Blended Fabrics, Shirting Fabrics, etc. in the fabrics segment, Yarns such as Polyester Textured Yarn, Polyester Cotton Yarn, Polyester Spun Yarn, Viscose Spun Yarn, etc. Made-ups such as Shawls/scarves, Muffler, Bulk Container, etc.

IMPORT TARIFF

Import tariff applied by Bangladesh on Textiles, Apparel, including carpet is percent ad valorem which are given under:

	HS Chapter/Subheading	Tariff Rate Range (%)
YARN		
Silk	5003-5006	25
Wool	5105-5110	5
Cotton	5204-5207	5 - 10
Other vegetable fiber	5306-5308	10 - 25
Man-made fiber	5401-5406/5501-5511	5 - 25
Woven Fabric		
Silk	5007	25
Wool	5111-5113	25
Cotton	5208-5212	25
Other vegetable fiber	5309-5311	25
Man-made fiber	5407-5408/5512-5516	25
Knit Fabric	60	25
Non Woven Fabric	5603	25
Industrial Fabric 59	1 - 25	
Apparel	61-62	10 - 25
Home Furnishings including: bed, bath, kitchen linens, etc	63	5 - 25
Carpet	57	25

Source: OTEXA

BRIEF ON INDIA-BANGLADESH BILATERAL RELATIONS

Bangladesh and India are South Asian neighbours. Both political and economic relations between India and Bangladesh have been friendly. They are common members of SAARC, BIMSTEC, IORA and the Commonwealth. The two countries share many cultural ties.

EXPORT PROMOTIONAL INITIATIVE OF THE COUNCIL

The huge gap in domestic demand corresponding to domestically available and supply of textile raw materials opens up enormous opportunities for India to tap the Bangladeshi textile market. Moreover, close geographical proximity between India and Bangladesh is our inherent advantage to capture Bangladeshi market.

In view of the increasing potential for export of Manmade fibre textiles from India to Bangladesh, SRTEPC is organizing participation of member exporters in 17th Dhaka International Yarn & Fabric Show 2020 (17th DIFS 2020) being held from 26th to 29th February, 2020 (Wednesday – Saturday) at Dhaka, Bangladesh under the MAI Scheme in association with the High Commission of India in Dhaka and with the support of the Ministries of Commerce & Industry and Textiles, Government of India. SRTEPC participation has been supported by the leading Textiles & Clothing Associations of Bangladesh to help us invite leading Bangladeshi textile Buyers and arrange them visit the participating Member-companies of the Council during the Event and have fruitful discussions for materializing business orders.



SRTEPC Participates in “Garknit-X” in Kolkata



Chief Guest, Shri Firhad Hakim, Hon'ble Minister of Urban Dev. & Mayor of The Kolkata Municipal Corpn. speaking at the “Garknit-X”. Also seen on the dais (from l to r) Shri Sanjay Jain, Chairman, ICC National Expert Committee on Textiles (first) and Shri Sujit Bose, Hon'ble Minister, Dept. of Fire & Emergency Services and Forest, Govt. of West Bengal (fifth), among others.

The Synthetic & Rayon Textiles Export Promotion Council (SRTEPC) organized its participation in the 17th edition of “Garknit-X” held at Eco Park, Newtown in Kolkata. The 3-day Int'l. Trade Fair --- one of the largest Shows in Eastern India, which was organized from December 6th-8th, 2019 by M/s. Vardaan Events Pvt. Ltd. in association with West Bengal Hosiery Association, was a massive initiative for showcasing apparel, embroidery, knitting, screen & digital printing technology, and fabric & accessories.

RBSM organized by ICC: On the sidelines of “Garknit-X”, India Chamber of Commerce (ICC) organized a “Reverse Buyers Sellers Meet” (RBSM) with participation of 40 companies of textiles & apparels, which are mainly from the MSME segment. As part of the MAI Programme of MoC, Govt. of India, the Organizers invited more than 50 buyers from different regions in the world including Asia & Middle East, Africa, Europe, Australia and South America.

Inauguration: The Exhibition was inaugurated by the Hon'ble Minister, Shri Firhad Hakim - Dept. of Urban Dev. & Mayor of The Kolkata Municipal Corpn., and Hon'ble Minister, Shri Sujit Bose – Dept. of Fire & Emergency Services and Forest, Govt. of West Bengal on 6th December 2019 in the presence of Shri Sanjay Jain, Chairman, ICC National Expert Committee on Textiles & M.D. of TT Limited, Shri Ashok Todi, President, West Bengal Hosiery Association, Shri K. B. Agarwal of Rupa & Co., Shri Pradeep Todi of Lux Industries Ltd., and media persons.

Participants : Around 150 Exhibitors including Reliance Industries Ltd. --- representing more than 50 brands, participated in the Fair, which drew a large number of manufacturers, exporters and trade visitors. The Expo was also attended by eminent professionals, senior Corporate-Heads and industry decision-makers.

Role of “Garknit-X” : “Garknit-X”, which has been playing a key role in spreading the technological revolution in Eastern India, served as a common platform for interaction among the concerned stake-holders in the industry to gain foothold in the fast growing market, as Kolkata is witnessing improvements in manufacturing capacities along with huge investments in the region. The Industry in this area is growing every year, which plays a very important role in the economy of the Capital-city of West Bengal.

Visiting Foreign Buyers : In connection with the RBSM organized by the ICC on the sidelines of “Garknit-X”, more than 50 foreign buyers of textile & apparels from different countries including Palestine, Mauritius, Jordan, Egypt, Rwanda, Senegal, Morocco, Chile and Poland were sponsored by the Organizers for holding B2B Meetings.



Officer of SRTEPC in discussion with the overseas buyers



West Bengal – an emerging Textile Centre : West Bengal has the potential to emerge as a major 'Textile Centre' in the country. The State has a rich heritage of skillful workmanship and artistry in the industry. The region is also very known for its well-developed Hosiery, Knitting and Garmenting Industry. The five sub-sectors of the Textile Value Chain in the state today are Hosiery & Inner-wear, Linen, Work-wear, Technical Textiles and Textile Machinery. Today, leading exporters, domestic Inner-wear and many Kids-wear brands originate from this region. Kolkata houses a number of varied textile manufacturing and distributing companies. The Textile Industry in West Bengal contributes to the industrial output, export and employment sectors of the state. Apart from Hosiery --- Handloom, Cotton, Jute and Silk are the other major industries flourishing in Kolkata & around. More than 2 million people are directly employed by the region's Textile Industry, and another half million indirectly.

Since Kolkata is the Gateway to this region, as well as countries like Bangladesh and Nepal -- "Garknit-X" is very popular to buyers, who are keen to adopt modern technology to their respective units to boost production capacity. During the Show, many leading players from the industry presented their latest innovations to their target customers.

Purpose for participation by SRTEPC : The basic purpose for the participation of SRTEPC in "Garknit-X" was to create an awareness about its role and service to local companies of textiles, and attract those keen for entering into the export-trade for enrolling them as members of the Council.

SRTEPC Booth at "Garknit-X" : In view of the pioneering role of SRTEPC for the promotion of export-trade of MMF textiles, Organizers of "Garknit-X" provided the Council with a furnished booth on complimentary basis. The Council put up an attractive display of its fabulous range of products including medical textiles, industrial textiles, hosiery products, homotech, besides posters to publicize its industry & trade among the visiting local companies of textiles and Int'l buyers. A large number of foreign buyers and local trade visitors thronged to the SRTEPC booth to have a glance at the impressive display of an innovative range of MMF textiles. Many local companies even enquired about the service of SRTEPC and its membership.



Round table discussion with foreign buyers

Based on the specific requirements for products --- falling under the purview of the Council, visiting Officer of SRTEPC attended a "Round Table Discussion" with Foreign Buyers, who were specially invited by ICC from various countries in connection with its RBSM Programme for sourcing their requirements of textiles from India. The Officer of SRTEPC also met a good number of visiting Executives of the local textile companies on --- "one-to-one basis" at its booth for exploring the possibilities of obtaining their membership with the Council.

Conclusion : As SRTEPC didn't participate in any event in Eastern India since a long period, participation of the Council in "Garknit-X" has created an excellent awareness about SRTEPC and its service among those visitors involved with local traders of textiles for examining ways for using SRTEPC as their "free Consultancy Agency" to get a complete "Export Activity Plan", based on their membership with the Council for promoting their trade. This has also enabled the Council to establish an effective "link with the concerned visiting company-reps.", which may help the Council enhance its existing membership-base in West Bengal significantly in the near future.



Trade visitors at the SRTEPC booth

SRTEPC organised Seminar on Technical Textiles and latest trends in MMF textiles in Mumbai



Shri Ronak Rughani, Chairman, SRTEPC addressing the Seminar



Seminar in progress

The Synthetic and Rayon Textiles Export Promotion Council (SRTEPC) organised a successful Seminar on Technical Textiles and latest trends in MMF textiles at its Head Office in Mumbai on 3rd December, 2019. The Seminar was attended by 35 Member – companies of the Council.

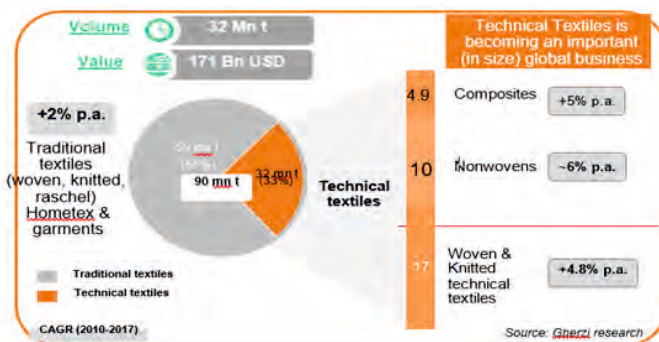
The Manmade Fibre textile industry occupies a pre-eminent position not only in India but across the world, due to versatility of their qualities and growing popularities being the most affordable clothing. Global end use demand for textile fibres is forecast to expand by an average of 2.8% per annum between 2015 and 2025, from 90.1 mn tons to 119.2 mn tons and global end use demand for man-made fibres is expected to increase by 3.7% in 2025. Currently, Manmade fibre textiles account for about 60% of world textiles trade and Manmade fibres account for about 75% of global fibre consumption. Manmade fibres share in global fibre consumption as well as in world textile trade has been growing than ever before.

An emerging segment in textiles industry is the Technical Textiles segment which has enormous growth potential. Technical Textiles due to their numerous applications & use have received significant attention across the world. Technical or engineered textiles are defined as products that are used for functional purposes. These textiles have applications in multiple areas of economic activity, such as aerospace, shipping, sports, agriculture, defence, health care, etc. More that 90% of fibres used in technical textiles is of MMF.

Taking into consideration the growing scope and opportunity of both MMF textiles and Technical Textiles sector and importance to update the Member-exporters in this regard, this Council has organised the Seminar on Technical Textiles and MMF textiles in association with Gherzi Consultants, Zürich, Switzerland.

The resource persons who made the presentations were Mr. Hendrik van Delden, from Germany who is an expert in Technical Textiles area and Mr. Navdeep Singh Sodhi who is a Partner with Gherzi Textile Organisation, Switzerland and leads management consulting practice in Asia and Africa.

During the Presentation on Technical textiles it was informed that based on the end application the technical textile products are broadly classified into 12 segments, viz., Agrotech, Buildtech, Clothtech, Geotech, Hometech, Indutech, Meditech, Mobiltech, Oecotech, Packtech, Protech and Sportech. Further it was mentioned that on a world scale Technical Textiles represent about 28% of total textile production. Nonwovens are the single largest segment representing 33% of fibers consumed in Technical Textiles worldwide. The technical textiles market has grown exponentially in the last few years, and this trend is expected to continue.



Continued on page 23



Best Practices in Sustainability in Textiles – Tesco PLC

As part of the 'SwachhtaPakwada' initiative, with emphasis on sustainable and environment friendly manufacturing in textiles, we are sharing herewith the best practise and company road map in Sustainability of Tesco PLC, part of one of the largest affordable fashion brands 'F & F' with 526 stores. Their representative was an invited buyer to 'Source India 2019' and they are well aligned with UN Sustainable Development Goals

“Zero Discharge of Hazardous chemicals (ZDHC) is one key area which all the wet processing units should look at and make sure the water discharges are not harming mother nature and the environment. Sustainable Raw materials is another key area Tesco Sourcing is looking at, such as BCI, Recycled polyester, Sustainable Man made cellulosic fibers (MMCF) with verification and even sustainable trims.

Tesco Sourcing would like to engage more in Closed loop manufacturing and consumption rather than keeping it open loop. Cradle to Cradle/ reducing waste in the manufacturing is one of the areas to look at. Transparency & traceability of the same would also come as a priority to make sure all is in order and to validate”.

Members are requested to visit the website of Tesco Sourcing which contains Tesco Sustainability information in all aspects for public facing materials.

<https://www.tescopl.com/sustainability/>

<https://www.tescopl.com/sustainability/sourcing/topics/ff/>

Given below is their road map on sustainable manufacturing that provides a holistic picture of their requirements which are well aligned with UN Sustainable Development Goals. This presentation can serve as a useful guide to our manufacturing exporters in terms of the expectations of renowned global retail brands.





Background & Scene Setting.

Sustainability globally is not only a trend but is now fast becoming lifestyle and a key priority for many nations in how they operate and in Tesco it has gone up in the list of priorities we work on as a retailer.

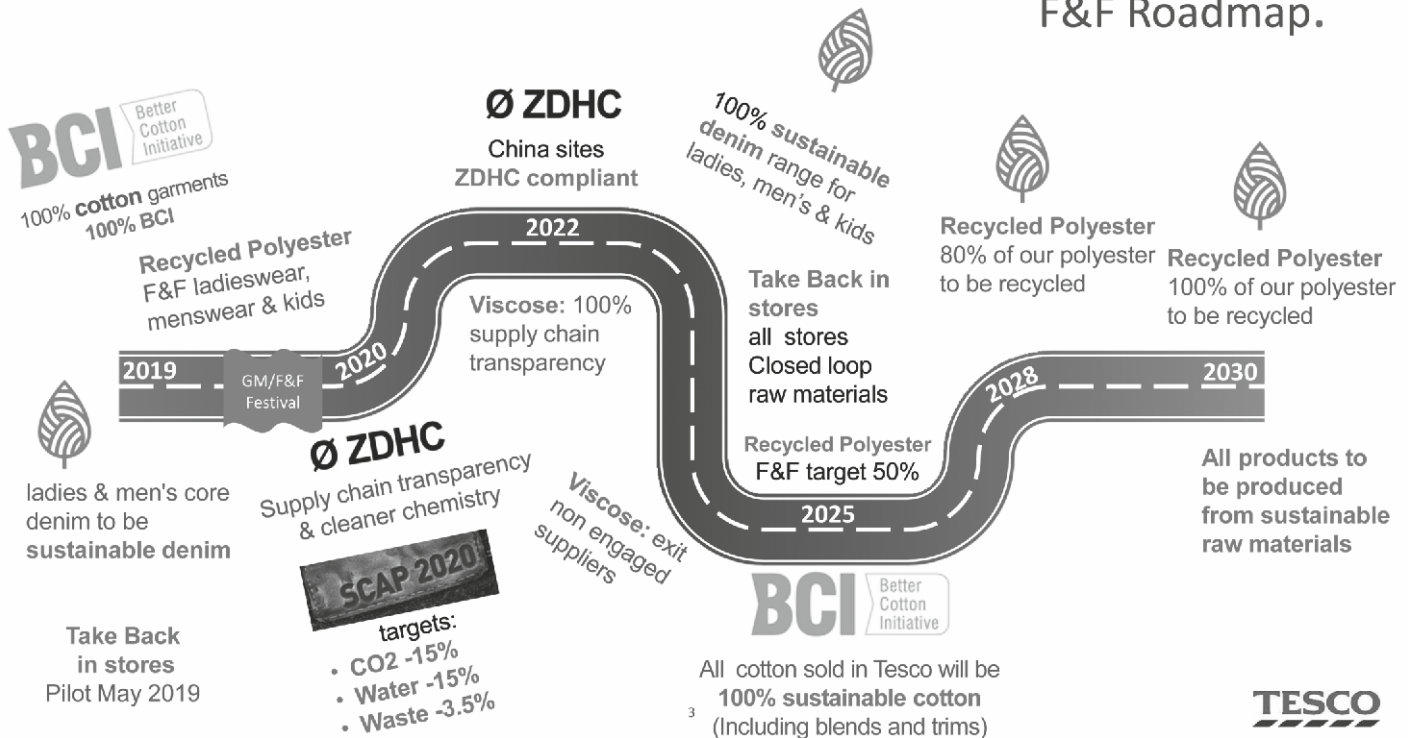
F&F does a lot of work on sustainability and has a clear strategy and a road map that we work towards under the product team. Commercial, Technical, Fabric and Sourcing focuses on many areas under sustainability and the effort and involvement of different teams are at varies levels and sometimes results in missed opportunities for synergies and ultimately better results.

Through the Tesco sourcing sustainability champions the aim is to bring more focus to the main goals by creating awareness, share best practices in the sourcing countries encouraging more initiatives within sourcing countries and the supplier base as well as implement sustainable initiatives in the way we operate in our sourcing offices.

As sustainability leads in your countries, you will bring people of different teams together to regularly to share existing initiatives, best practices, question things, trial ideas etc. can help improve our sustainability initiatives.

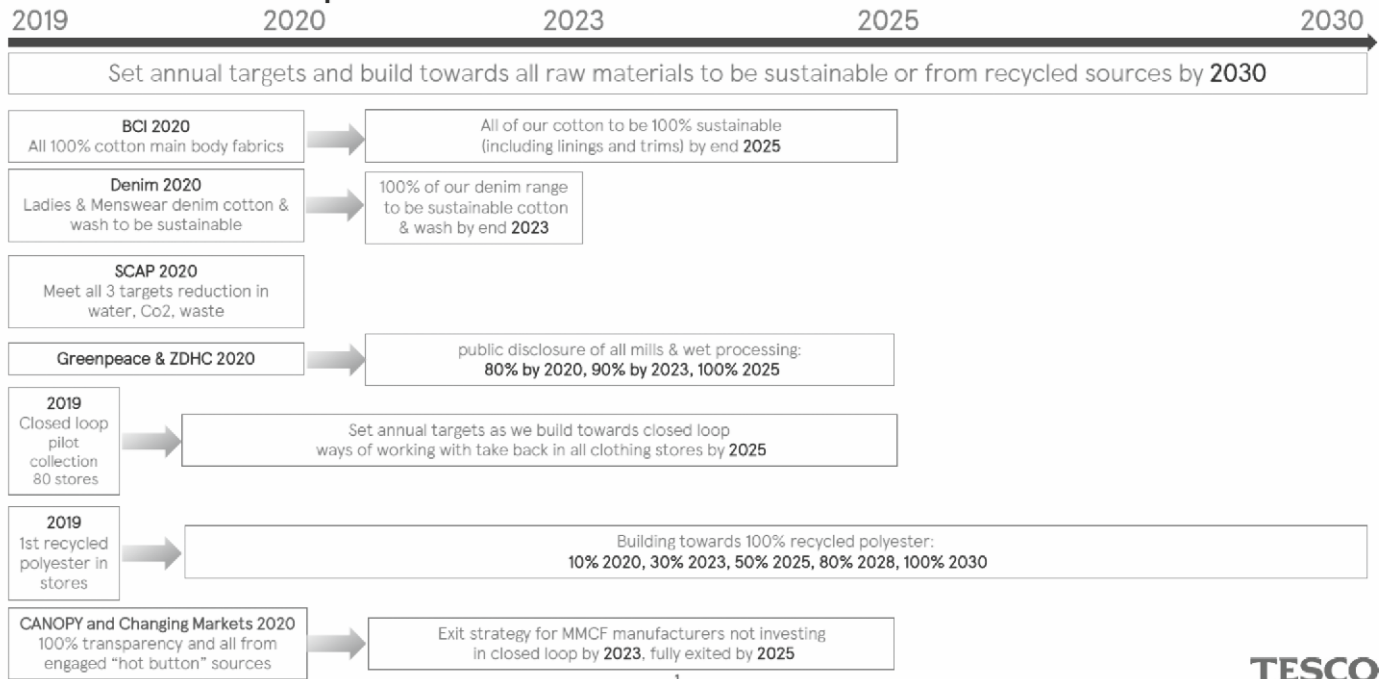


F&F Roadmap.





F&F Roadmap



Commitments.



Cotton is our most important fibre but it requires a lot of water and chemicals to grow. We support the Better Cotton Initiative which trains farmers to grow more sustainable cotton by using:

- Less water
- Less chemicals

Better for the environment Better for farmers.

Achievements.

- All of our 100% cotton products are 100% BCI.
- Ahead of our plan for all cotton including blends to be 100% BCI by 2025,
- Year to date we are 80% by volume of cotton



Greenpeace Detox Campaign highlighted the use of chemicals and environmental impact of the fashion industry.

- 2020 targets:
- Publicly share our list of wet processors & waste water tests
 - Use preferred chemicals
 - Start using recycled fibres
 - Offer customer take back in stores

- 100% transparency of our mills and waste water testing at our top 100 mills
- Our first recycled polyester garments in stores SS2019
- Take Back Pilot launched in stores SS 2019
- Sustainable denim in stores AW 2018



ZDHC is the industry response to the Greenpeace Detox campaign. ZDHC training and tool kits help our supply chain manage their input chemicals reducing the impact on the environment

- We have a seat on ZDHC mainboard
- We influence ZDHC strategy
- Our suppliers have attended ZDHC training.



Sustainable Clothing Action Plan is a UK Government initiative for brands & retailers to collaborate and achieve a set of agreed sustainability targets. 2020 targets to reduce:

- Water consumption 15%
- CO2 emissions 15%
- Waste 3.5%

(The Environmental Audit Committee praised Tesco publicly for our progress)

- 2 goals achieved 1 year ahead of plan by Tesco:
- Water reduced by 29%
 - Co2 reduced by 16%
- On target to reduce the 3rd goal to reduce waste



Viscose is our top 3 fibre. We support 2 initiatives:

1. Canopy - protecting ancient & endangered forests
2. Changing Markets Foundation - Roadmap towards responsible viscose fibre manufacturing (This NGO praised Tesco publicly for our progress)

- Our supply chain is fully engaged and attended training
- We have transparency of fibre source for +80% of our viscose.



We have financially supported PaCT in Bangladesh since 2013. Led by International Finance Corp (IFC), this collaboration focuses on the implementation of best practises to reduce water and energy consumption and waste water pollution. UN sustainable development goal No 12, Responsible consumption and production, is

- PaCT Overall savings:
- 21.6billion litres/year water
 - 2.5million MWh/year energy
 - 460,000 tonnes Co2/year

Funding Futures.

University Scholarship for +1,000 children of workers and back to school program for women workers in Bangladesh, China, India, Sri Lanka, Turkey

Women worker leadership training and career development program to benefit over **160,000 women workers** in Bangladesh, India, Pakistan, Sri Lanka

F&F Little Helpers Colleague Volunteers supporting local communities, eg Hatfield homeless centre and match funding

Worker representation / empowerment and multi-stakeholder partnerships, e.g. ILO Better Work Program and other supply chain improvement

Health and rehabilitation support for 45,000 workers (including disabled workers and their families) in China, Bangladesh, India

Disaster Relief to support victims of natural disasters in our sourcing supply chain



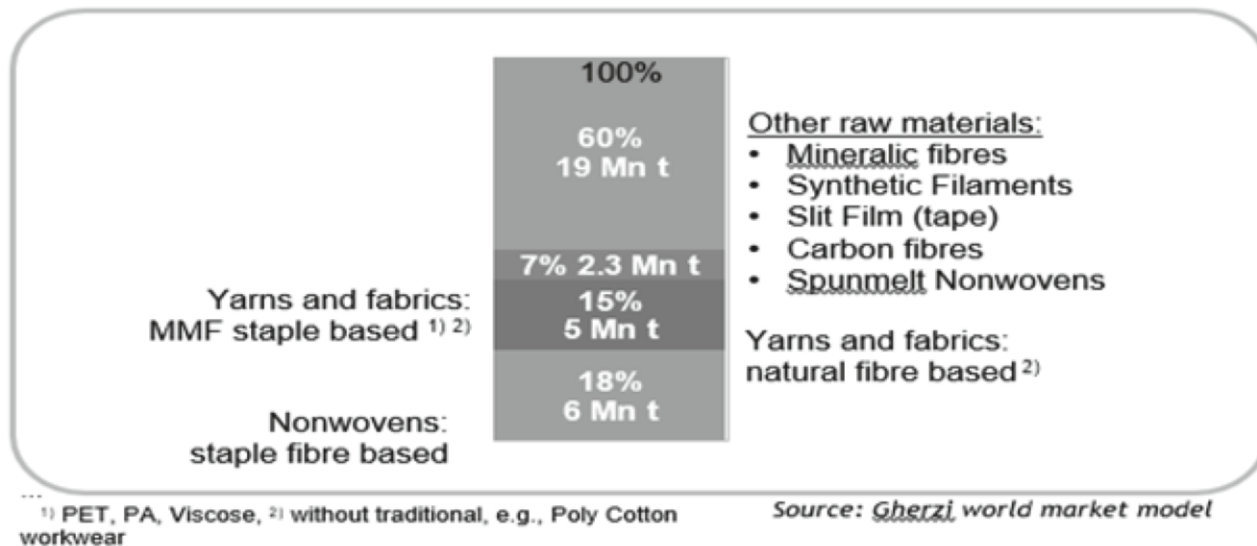


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Indutech is the most consumed segment in the world technical textile market with 17% of market share whereas, packtech is the largest segment of Indian technical textile industry which covers 40% share. Agrotech and Geotech have small market share (approx. 1-3%) in world and India technical textile market as well.

India is majorly manufacturing products falls under segments like packtech, hometech, clothtech, sportech, etc. At present India is consuming technical textile products from all 12 sectors.

The key MMF manmade fibres, filaments used as raw materials in technical textiles are: Polyester, viscose, nylon, acrylic/mod acrylic, polypropylene and the polymers like high density polyethylene (HDPE), low density polyethylene (LDPE), and poly vinyl chloride (PVC), etc.



The above exhibit shows the raw material used in Million (Mn) tons for technical textile production in year 2017, this is majorly categorized in to four parts, includes natural based yarns and fabrics, staple mmf based yarns and fabrics, staple fibres based nonwovens and the major part contains synthetic filaments and mineralic staple fibres and spunmelt nonwovens, etc.

Presently technical textiles are majorly made of high-performance synthetic fibre due to their cost, performance and durability. technical textiles consume 28% of MMF out of total worldwide MMF consumption. Mobiltech, Carpets, hometextiles and packtech are the major MMF consuming technical textiles.

Major consuming countries

Currently, the emerging economies show the highest demand and growth compared to the developed regions. The EU, the USA and China represent about half of the world market for Technical Textiles. The USA is the No. 1 market outside of Eu28.

SWOT Analysis of the Indian Technical Textile Industry

During the Seminar the Strengths, Weakness, Opportunities and Threats of the Indian Technical Textile Industry was discussed.

The Strengths as mentioned during the Seminar are availability of domestic market, abundant availability of raw materials, low labour cost, etc. Weaknesses are lack of awareness about products, lack of knowhow, etc. Opportunities are import substitution, opportunity to become a supplier for B2B market, etc. and Threats are competition from China and Europe, Market captured by Chinese technology, Chinese bulk supply at aggressive price, etc.

Continued from page 1

- Different views were expressed by the participants. Finally, it was agreed that GST on MMF should be rationalized. There should be fibre neutrality. Any reduction in excise duties on MMF and MMF textiles will have a highly positive impact on the growth of MMF consumption.
- Focus on value addition (Finished goods): India should also attempt a structural transformation whereby it becomes a net exporter of finished products. This would imply that growth rates of apparel and other finished products will grow up.
- The Chairman (SRTEPC) said that the activities of Weaving, Knitting, Processing, Embroidery and other value additions getting done job work were earlier treated as a manufacturing activity but under GST regime they are treated as service and not allowing for Input Tax Credit. He, therefore, requested that these job works should be treated as manufacturing activity
- The Chairman (SRTEPC) said that the Textile Merchant exporters should be treated at par with manufacturing exporters as the Textile Merchant exporters are purchasing raw materials, getting the materials converted into finished goods, generating employment, funding the entire process etc like manufacturer.
- Economies of scale: The advent of large manufacturing plants with economies of scale will help India in achieving global competitiveness. It was suggested that there should be increase of capacity (PTA/MEG), Fibre etc., and its capacity utilization.
- Chairman, SRTEPC said that MSME contributes more than 60%. Therefore, they should be protected down the value chain. Their contribution should be encouraged.
- Promote R&D for indigenous development of high performance and specialty fibres. It was suggested that either the industries should set up their own R&D units or the TRAs should be strengthened. R&D of product development, technology development, better finishes/processing, sustainable textiles etc., should be encouraged.
- Promote India as an investment destination and attract FDI in this sector. It was agreed that investment should be encouraged. The investment may come from countries like South Korea, Japan and Turkey.
- Chairman (SRTEPC) said that India is seen as a cotton manufacturing country. There is need to create awareness about MMF globally.
- Fiscal issues: Protection of domestic industry from cheap imports. Shri S.C Kapoor mentioned that there is threat from China and other south east Asian countries. Therefore, customs duty should be increased. After detailed discussion, it was agreed that the customs duty should be rationalized for optimum production and competitiveness at every stage of value chain.
- Strategic Branding of Indian man-made textiles by various means including thrust on production of ecofriendly textiles from viscose and recyclable PSF etc. It was agreed that Global Apparel, Consumer and Fashion branding may be encouraged.
- Free Trade Agreements with European Union. It was suggested that such FTAs should be expedited. Yarn and Fabric forward policy may be expedited.
- Rules Of Origin - In order to bring a positive turn around in apparel industry and to prevent entry of Chinese fabric into Indian market, suggestions have been received to impose "De-Minimis Rule of Origin". According to the de-minimis rule, non - originating material used in the production of a good that do not satisfy an applicable rule for the good shall be disregarded, provided that the totality of such materials does not exceed specific percentages in value or weight of the good.
- Policy should focus on sustainability, recycling and Circular economy as it is an excellent employment potential segment.
- Various Fibre and filament production machinery may be included under TUFs. Shri R.K.Vij, Indo Rama suggested that Manmade fibre should be covered under ATUFs. The subject fibre should also be under the Ministry of Textiles for the growth of the entire value chain.
- Dr. Selvaraju, SG, SIMA suggested that weaving and spinning need to be encouraged under ATUFs. He said that the big companies which have invested huge amount under RRTUFs are not getting encouragement because of the subsidy Cap of Rs. 20/30 crore under ATUFs. Therefore, he has suggested that the benefits extended under RRTUFs need to be extended under ATUFs and the Subsidy Cap needs to be increased. He further said that the existing capacity need to be utilized. There is need for consolidation of units. Modernisation of Weaving, Knitting, Processing and Technical Textiles should be taken up on priority and focused under the new textile policy.
- Chairman (SRTEPC) said that MMF is growing at its own strength and not because the cotton production is declining. JS (SS) said that the world trend is going towards MMF.
- Since the MMF textiles sector is technology and investment intensive, availability of adequate credit at international interest rates may be ensured.
- It was agreed that the growth projection for the next five years should be 60:40/MMF:Cotton and for next 10 years i.e. by 2030 it will be 70:30/MMF:Cotton.

The meeting concluded with vote of thanks to the chair.

GROWING GLOBAL FILAMENT AND SPUN YARN PRODUCTION SCENARIO DURING 2018

Filament and spun yarns are raw materials for fabrics. Filament yarns in the medium-to-fine count range are used in fabrics for apparel, and those in the very fine count range are more appropriate for hosiery and also for carpets, sportswear, and as industrial yarns for technical textiles. Spun yarns are suitable for shirts, trousers, suits, home textiles, and bed linen.

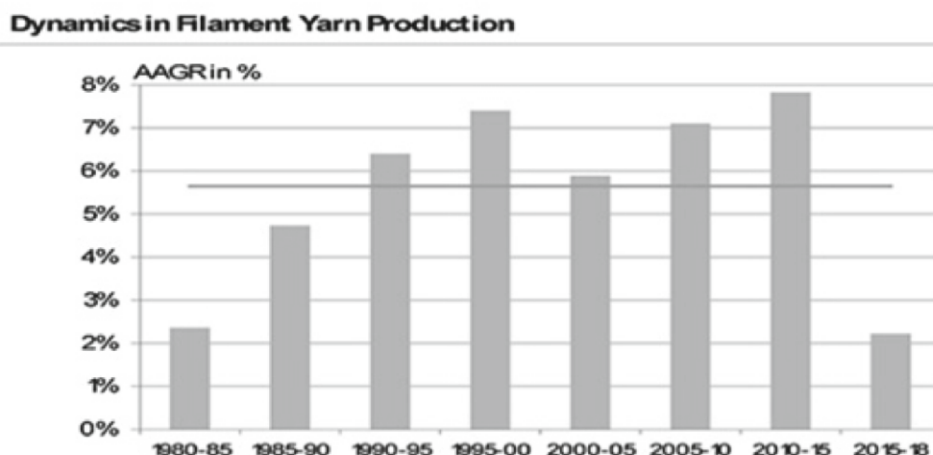
The physical and mechanical properties of a fibre, as the unit cell of a textile material, clearly contribute to a fabric's mechanical properties. However, according to the spinning system used, the yarn structure and properties can be varied considerably to alter packing, surface, and mechanical properties. The fabric itself imposes another set of variables, such as sett and weave, to further diversify the overall list of fabric properties.

The use of textiles for apparel, home furnishing, and industrial/technical applications depends on a unique combination of required properties. Fabrics for apparel, for example, require comfort, hand, drape, breathability, easy care, durability/abrasion, esthetics, dyeability and, of course, tailorability. The requirements of fabrics for home textiles (such as curtains and upholstery, for example) are drape and esthetics which usually include strength and durability.

In general, spun yarns of either single or blended fibres are the major building materials in woven fabrics. Continuous filament yarns are used either as textured or as core spun yarns. There needs to be maximum packing of yarn in fabric for several applications. The properties of a textile governing its conformation to a technical specification are the functions of the yarn network, thickness, and mass. The properties of yarns and fabrics depend largely on the properties of the constituent fibres.

Globally, filament growth rates have been faster for most of the almost four decades in the world fibre market movement. The long-term average growth rate of filament was 5.6%, although the expansion in the most recent three years was at slowest pace in modern textile industry. This declining trend was plausibly due to economic uncertainty, destocking and slowing consumption at retail stage.

Dynamics in filament production from 1980 to 2018 (SOURCE: *The Fiber Year*)

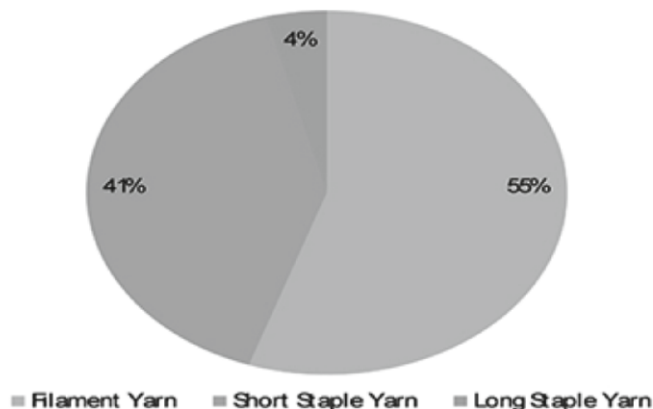


Filament supply has tremendously grown from 6 million tonnes in 1980 to 48 million tonnes during 2018. Dominant fibre type is polyester that has been used in textile, industrial and carpet applications with an industry share of more than 80%. Polyamide ranks second as its volume has substantially increased recently, occupying around 10% of the segment, while polypropylene in the long run was quite flat. Viscose / Cellulosics fibre share shrunk and it held a marginal share of around 1% in 2018 as compared to nearly 19% in 1980, but expansions in future are expected. Spandex, offering exceptional elasticity to garment products without compromising on comfort, enjoyed strong dynamics with the manufacturing volume doubling in the previous seven years to account for nearly 1 million tonnes.

Production of spun yarns was virtually stable after 2012, accounting for around 39 million tonnes annually. Spun yarns used to hold the majority in volume terms until 2013, but they were not able to compete with stunning filament growth in more recent years. Advantages in price, value additions & enhanced properties, growing feedstock investments and the artificial cotton price hike from time to time have triggered a filament boom. However, growth of both types of yarns remained in the third consecutive year below 2%. The market shares of Filament and spun yarn in 2018 are shown below.



Filament and Spun Yarn Market Shares 2018



Most of the leading industries succeeded in lifting spinning activities in the quota-free era, with China almost doubling its volume to enlarge its market share by 10 percentage points to 62% by 2018. Secondary spinning modestly expanded spun yarn output, despite almost 80 million spindles installed in that period according to the International Textile Manufacturers Federation (ITMF). Meanwhile, filament supply more than tripled to arrive at 35 million tonnes last year, almost equal to the entire world's production in the year 2012.

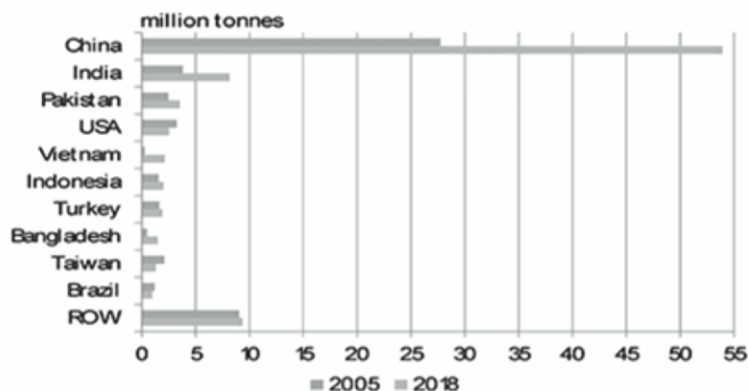
India, with the world's second-largest cotton and manmade fibre industry, has experienced dynamics in both segments, even if the former dominance of cotton yarns disappeared, declining from a share of 64% in 2005 to a share of 50% during 2018. Their volume was virtually on a par with filaments at about 4 million tonnes in the most recent year.

Contrary, the small-scale filament business in Pakistan is negligible, and cotton processing drives the industry. Nearly 30% of cotton used by Pakistan's filament business is sourced abroad to meet subsequent requirements, as domestic cotton cultivation has not yet recover from the disastrous harvest in the 2015-016 season. This contraction by a third marked Pakistan's lowest cotton output in the century.

The performance in the U.S. was characterized by a drop in both spun and filament yarns, whereas the filament sector recovered from financial crisis and managed to gently enlarge local production. Cotton yarn spinning moved sideways after the financial crisis, and its output was almost cut in half compared with 2005. This crop, however, is essential, as the country remains by far the largest exporter of cotton.

In Vietnam outstanding dynamics have been observed from a very low baseline. The country evolved into the third-largest cotton importer in the current season at around 1.6 million tonnes, and the build-up of manmade fibre capacities have made the industry the third-largest producer of polyester industrial yarns. The dynamic development was favoured by the World Trade Organization accession in January 2007, as well as current circumstances such as rising labour costs in China and the US - China trade war, which promoted further expansions. The growth momentum is expected to continue with duty-free agreements boosting exports in the future due to the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) with 10 other Asia-Pacific countries and the free trade deal with the European Union.

Top 10 Yarn Suppliers 2018



The above mentioned five countries viz., China, India, Pakistan, USA and Vietnam together accounted for 80% of the global yarn supply and they have witnessed a growth of about 10% since 2005. The growth drivers for the Asian countries are likely to remain in place and it is likely to witness a gradual diminution of the U.S. textile chain.

(This article has been prepared by compiling information from the textile yearbook, *The Fiber Year*.)

REVIEW OF INDIA'S MAN-MADE FIBRE TEXTILES EXPORTS DURING APRIL – OCTOBER 2019-20

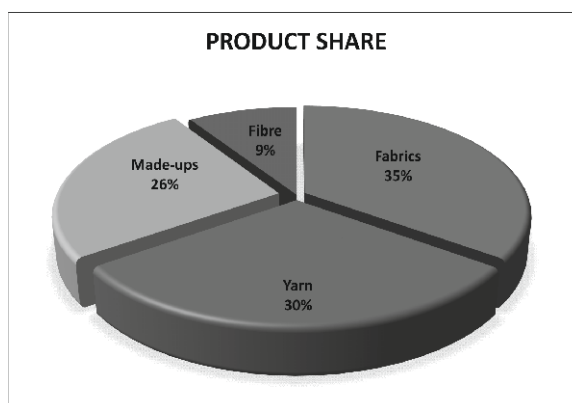
Exports of Indian MMF textiles during April-October 2019-20 were US\$ 3427.63 million against US\$ 3611.46 million witnessing a decline of 5.09% as compared to the same period of the previous year (Source: MOC).

Product	In Value USD Mn		% Growth	In Value USD Mn		% Growth
	Oct - 18	Oct - 2019 (P)		Apr - Oct 2018 - 19	Apr - Oct 2019 - 20 (P)	
Fabrics	165.18	189.24	14.57	1111.35	1199.00	7.89
Yarn	159.79	145.05	-9.22	1230.58	1036.20	-15.80
Made-ups	133.01	129.27	-2.81	924.18	875.99	-5.21
Fibre	44.82	44.56	-0.58	345.35	316.44	-8.37
	502.80	508.12	1.06	3611.46	3427.63	-5.09

*P = Provisional

PRODUCT SHARE

During April-October 2019-20, dominated products in the Indian MMF textiles export basket was fabrics accounting for a share of 35% followed by yarn 30%, Made-ups 26% and Fibre 9%.



HIGHLIGHTS

- Overall exports in April-October 2019-20 declined by 5.09% as compared to the same period of the previous year.
- Exports of MMF yarns have witnessed a decline of 15.80% during April-October 2019-20 as compared to the same period of the previous year.
- Exports of MMF Made-ups have also witnessed a decline of 5.21% during the period as compared to the same period of the previous year.
- Exports of Manmade fibres (MMF) have also witnessed a decline of 8.37% during the period as compared to the same period of the previous year.
- Only MMF Fabrics exports witnessed 7.89% growth during April-October 2019-2020 as compared to the same period of the previous year.
- Exports of fabrics dominated with 35% share followed by yarn 30%, Made-ups 26% and Fibre 9% in the Indian MMF textile exports.
- Share of the value-added segments like fabrics and Made-ups have increased to 60% of total exports.
- In the fabrics segment Synthetic Filament Fabrics (US\$ 440.44 Mn) the top exported product in India's MMF textile exports followed by Polyester Filament Fabrics (US\$ 236.65 Mn) during April-October 2019-2020.
- Nylon Filament Fabrics exports have been excellent with nearly 63% growth.
- In case of MMF yarn exports, Polyester Filament Yarn was the leading item with exports worth (US\$ 622.06 Mn) followed by Polyester Cotton Yarn (US\$ 85.34 Mn), Polyester Spun Yarn (US\$ 72.91 Mn).

- In Made-ups, exports of Bulk Containers was the leading item with exports worth US\$ 408.44 Mn followed by motifs US\$ 60.88 Mn, shawls/scarves and muffler worth US\$ 50.46 Mn and US\$ 50.19 Mn respectively.
- Polyester Staple Fibre (US\$ 174 Mn) was the leading item in the MMF category followed by Viscose Staple Fibre (US\$ 97.89 Mn).
- USA was the leading market for Indian MMF textiles during April-October 2019-20 with 10% share in total exports followed by Turkey 8% and UAE 6%.
- Other major markets during April-October 2019-20 were Brazil (4%) Sri Lanka, Germany, Egypt, Italy and Belgium with share of 4%, 3% and 2% each.
- UAE, Sri Lanka and USA were the leading markets for Indian MMF Fabrics during April-October 2019-2020.
- USA was also leading market for Indian MMF Made-ups and fibre during the period, followed by UAE, Germany.
- Yarn Exports to important markets like Turkey, Brazil and Egypt have declined significantly by 8.10%, 30.54% and 13.16% respectively.
- Yarn Exports to UAE have increased by 50%.
- Made-ups exports to Egypt showed an impressive growth rate by 71.02%.

PRODUCT-WISE EXPORT PERFORMANCE APRIL-OCTOBER 2019-20

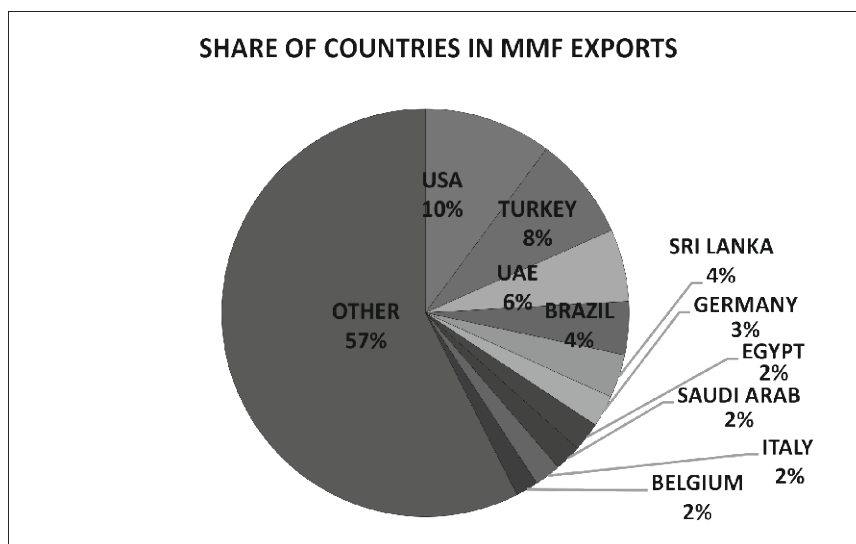
Product Description	Apr - Oct 2018-19	Apr - Oct 2019-20 (P)	% Net Change	% Growth
FABRICS (Woven + non-woven + knitted)				
Synthetic Filament	363.49	440.44	76.95	21.17
Polyester Filament	227.61	236.65	9.04	3.97
Polyester Viscose	175.59	165.94	-9.65	-5.50
Polyester Blended	50.07	53.64	3.57	7.13
Synthetic Cotton	27.38	25.36	-2.02	-7.38
Nylon Filament	15.20	24.71	9.51	62.57
Polyester Wool	22.97	20.52	-2.45	-10.67
Polyester Cotton	24.26	17.95	-6.31	-26.01
Viscose Blended	14.93	14.20	-0.73	-4.89
Viscose Spun	15.26	12.73	-2.53	-16.58
Artificial Filament	8.38	9.92	1.54	18.38
Viscose Filament	13.15	9.59	-3.56	-27.07
Other Fabrics	153.06	167.35	14.29	9.34
Total	1111.35	1199.00	87.65	7.89
YARN				
Polyester Filament	727.99	622.06	-105.93	-14.55
Polyester Cotton	110.01	85.34	-24.67	-22.43
Polyester Spun	98.32	72.91	-25.41	-25.84
Polyester Viscose	84.60	64.25	-20.35	-24.05
Viscose Spun	40.37	49.15	8.78	21.75
Acrylic Spun	25.39	23.25	-2.14	-8.43
Viscose Filament	30.42	21.44	-8.98	-29.52
Synthetic Spun	28.28	21.14	-7.14	-25.25
Nylon Filament	15.43	17.99	2.56	16.59
Polyester Wool	12.15	8.69	-3.46	-28.48
Other Yarn	57.62	51.98	-5.64	-9.79
Total	1230.58	1038.20	-192.38	-15.80

Product Description	Apr -Oct 2018-19	Apr - Oct 2019-20 (P)	% Net Change	% Growth
MADE-UPS				
Bulk Containers	431.28	408.44	-22.84	-5.30
Motifs	43.85	60.88	17.03	38.84
Shawls/Scarves	70.50	50.46	-20.04	-28.43
Muffler	36.70	50.19	13.49	36.76
Fishing Net	35.23	33.35	-1.88	-5.34
Blanket	17.90	15.89	-2.01	-11.23
Rope	15.97	15.40	-0.57	-3.57
Lace	2.94	14.67	11.73	398.98
Bedsheet	20.63	12.25	-8.38	-40.62
Furnishing Articles	9.03	12.16	3.13	34.66
Sacks and Bags	14.36	11.66	-2.70	-18.80
Other Made-ups	225.79	190.64	-35.15	-15.57
Total	924.18	875.99	-48.19	-5.21
FIBRE				
Polyester Staple	194.93	174.00	-20.93	-10.74
Viscose Staple	104.92	97.89	-7.03	-6.70
Acrylic Staple	28.58	26.50	-2.08	-7.28
Other Fiber	16.92	18.05	1.13	6.68
Total	345.35	316.43	-28.92	-8.37

*Flexible Intermediate Bulk Container (HS Code 63053200)/big bag/bulk bag or Super Sack is a standardized container in large dimensions for storing and transporting dry, flow able products, for example sand, fertilizers , and granules of M, plastics, most often made of thick wovenpolyethylene or polypropylene, either coated or uncoated. **Other Made-ups include Tents, Sails, Rags, Embroidery (without visible ground) & Accessories.

Synthetic Filament : HS Codes 54077200, 54072090, 56031200, 54077400, 54079400, 54079200

LEADING MARKETS



LEADING MARKETS

Value in US\$ Mn

Markets	Apr - Oct 2018-19	Apr - Oct 2019-20	Net Change	% Grw Decn
USA	380.30	347.40	-32.90	-8.65
TURKEY	301.02	282.09	-18.93	-6.29
UAE	180.52	196.37	15.85	8.78
BRAZIL	205.56	144.81	-60.75	-29.55
SRI LANKA	101.53	118.43	16.90	16.65
GERMANY	95.27	85.69	-9.58	-10.06
EGYPT	88.09	78.77	-9.32	-10.58
SAUDI ARAB	51.53	72.79	21.26	41.26
ITALY	96.98	71.15	-25.83	-26.63
BELGIUM	68.13	61.63	-6.50	-9.54
PAKISTAN	67.11	46.86	-20.25	-30.17

MAJOR MARKETS FOR MMF FABRICS

Value in US\$ Mn

Markets	Apr - Oct 2018-19	Apr - Oct 2019-20	Net Change	% Grw / Decn
UAE	105.07	111.58	6.51	6.20
SRI LANKA	82.37	100.16	17.79	21.60
USA	98.94	98.83	-0.11	-0.11
SAUDI ARAB	22.69	38.47	15.78	69.55
PAKISTAN	28.16	25.12	-3.04	-10.80
EGYPT	23.95	17.90	-6.05	-25.26
BELGIUM	10.55	11.54	0.99	9.38
ITALY	15.65	11.48	-4.17	-26.65
GERMANY	7.64	7.66	0.02	0.26
TURKEY	6.35	7.09	0.74	11.65
BRAZIL	4.00	4.79	0.79	19.75

MAJOR MARKETS FOR MMF YARN

Value in US\$ Mn

Markets	Apr - Oct 2018-19	Apr - Oct 2019-20	Net Change	% Grw / Decn
TURKEY	270.1	248.21	-21.89	-8.10
BRAZIL	188.43	130.88	-57.55	-30.54
EGYPT	56.3	48.89	-7.41	-13.16
USA	47.79	41.6	-6.19	-12.95
BELGIUM	23.62	22.67	-0.95	-4.02
PAKISTAN	24.57	17.36	-7.21	-29.34
SRI LANKA	14.15	14.16	0.01	0.07
ITALY	15.85	12.05	-3.80	-23.97
UAE	7.92	11.89	3.97	50.13
GERMANY	16.6	8.78	-7.82	-47.11
SAUDI ARAB	3.89	3.9	0.01	0.26

MAJOR MARKETS FOR MMF MADE-UPS

Value in US\$ Mn

Markets	Apr - Oct 2018-19	Apr - Oct 2019-20	Net Change	% Grw / Decn
USA	184.16	179.78	-4.38	-2.38
UAE	66.14	71.68	5.54	8.38
GERMANY	61.86	59.65	-2.21	-3.57
ITALY	56.91	42.7	-14.21	-24.97
SAUDI ARAB	23.27	28.95	5.68	24.41
BELGIUM	19.47	15.23	-4.24	-21.78
EGYPT	2.45	4.19	1.74	71.02
SRI LANKA	4.88	4.11	-0.77	-15.78
TURKEY	4.18	3.35	-0.83	-19.86
BRAZIL	2.33	3.22	0.89	38.20
PAKISTAN	10.87	1.6	-9.27	-85.28

MAJOR MARKETS FOR MMF FIBRE

Value in US\$ Mn

Markets	Apr - Oct 2018-19	Apr - Oct 2019-20	Net Change	% Change
USA	49.41	27.19	-22.22	-44.97
TURKEY	20.39	23.44	3.05	14.96
BELGIUM	14.49	12.19	-2.30	-15.87
GERMANY	9.17	9.6	0.43	4.69
EGYPT	5.39	7.79	2.40	44.53
BRAZIL	10.8	5.92	-4.88	-45.19
ITALY	8.57	4.92	-3.65	-42.59
PAKISTAN	3.51	2.78	-0.73	-20.80
SAUDI ARAB	1.68	1.47	-0.21	-12.50
UAE	1.39	1.22	-0.17	-12.23

Forecasting for Next Quarter

Exports of Indian MMF textiles have shown significant negative growth for the first time since 2015-16. This negative trend is likely to remain the same at least for the next quarter till the new Scheme RoDTEP comes into effect from January 2020. The continued plummeting global demand is likely to keep putting stress on exports of textile products from India. It has been predicted by Research agencies that demand for virgin fibres and conventional yarns, which consume huge amount water, chemicals, etc. are likely to go down further due to sustainability issues. However, demand for recycled fibres, value added yarns are likely to grow. Export performance of fabrics is projected to be encouraging due to positive market scenario in the GCC countries viz., UAE, Saudi Arabia, Asian apparel hub Sri Lanka, Belgium & Turkey in European side and Brazil in LAC. Made-ups export is under huge stress due to destabilization of American markets in view of ongoing trade war with China that may also take another quarter to stabilize.



SRTEPC/FE04/Brazil/2019-20

I) Country : Chile

- 1) Name of the Buyer : Mr. Claudio Rene Rosenberg Wallerstein
Name of the Company : Claudia Rosenberg
Mobile No : +56985493519
Email : crrosenb@gmail.com
Products of interest for import : Woven and Knitted Textiles, Jute Fabrics for bags

II) Country : Egypt

- 1) Name of the Buyer : Mr. Khaled Mahmoud Mohamed Khalil
Name of the Company : Mahallatex
Mobile no : +20122161215
Email : khaled@mahallatex.com
Products of interest for import : 100% Cotton Yarn, Fire Retardant Fabrics for its use in factories
- 2) Name of the Buyer : Mr. Ahmed Nabil Ahmed Gohar
Name of the Company : Texience
Mobile No. : +201005005542
Email : agohar@texience.com
Products of interest for import : All kinds of yarns, Woven Fabrics, Knitted Fabrics, Shirting Fabrics, Hand made Silk, Hand made Carpets, Knitted Garments
- 3) Name of the Buyer : Mr. Ashraf Ibrahim Hassan Elkobrossy
Name of the Company : El Nasr for Clothing and Textiles (Kabo)
Mobile No. : +201227227569
Email : ashraf.elkobrossy@kabo.com.eg
Products of interest for import : 100% Cotton yarn in 30/1, 36/1, 60/2(large quantity) - 12 tonnes per month | 50% Cotton/50% Polyester yarn - one container in 2 months
- 4) Name of the Buyer : Mr. Mohamed Ahmed Tera
Name of the Company : Tera Industrial Co.
Mobile No. : +201222187889
Email : mtera@teratexgroup.com
Products of interest for import : Yarns, PSF, VSF, ASF
- 5) Name of the Buyer : Mr. Ahmed Mohamed Kheir Ahmed Fouad Beshir
Name of the Company : Beshir Eng. & Trading Co.
Mobile No. : +201222105899
Email : abeshir@beshircompany.com
Products of interest for Import : Fabrics: Wool/Polyester-55/45-Count: 2/60 x 2/60 NH; Fabrics : 54% Polyester/44% Wool/2% Elastane, 100% Viscose Fabrics, Multi Chiffon Fabrics, Sewing threads, PSF (Dyed & raw white), Poly tops

If you are interested to explore this opportunity, please contact the Buyer directly along with details of your product, price-quotes, terms of trade, etc. at the earliest under intimation to the Council for necessary follow-up, if required.

As is the practice, members are advised to verify the financial standing of the Overseas Firms in Chile and Egypt, while finalizing any business deals.



Continued from page 4

General of India. Furthermore, a separate “Exhibitors Catalogue” – containing company & product profiles of the participating Indian Exhibitors was compiled by the Council besides the company profiles which appeared in the Organisers Exhibitors Catalogue, which was circulated among Vietnamese textile/garments producing and buying companies in an effort to publicize the presence of the participating Indian companies at VITA TEX in Ho Chi Minh City.

Presentations/B2B Meetings / Networking Dinner

A special program followed by B2B Meetings and Dinner was organized by the Consulate General of India at Rex Hotel on 21st November 2019. During the program, Dr. K. Srikar Reddy, Consul General of India highlighted that - bilateral trade in textiles between India and Vietnam has registered an impressive growth during the last two years. Indian textile and clothing exports to Vietnam grew 48% during the last two years from US\$ 390 million in 2016-17 to US\$ 578 million in 2018-19. However, there is a significant untapped potential for trade in the area of textiles between our countries. Vietnam is dependent on other countries for raw materials for garments such as cotton, yarn, made-ups and fabrics and it is looking to diversify its sources. Also, as per the India-ASEAN FTA, most types of yarns, woven and knit fabric can be imported duty-free from India. India can become a reliable partner of Vietnam in supplying yarn, fabrics, and machinery at competitive prices.

Mr.Vu Duc Giang, Chairman, VITAS stated that Vietnam's exports in the Textiles and Garment sector rose from about US\$ 1.75 billion in 1999 to estimated US\$ 39.5 billion in the year 2019. The overall size of Vietnam's textile and garment industry is around US\$ 44 billion with the domestic market at US\$ 4.5 billion. He informed about the recent measures taken by Vietnam to boost textile & garment exports such as investing in 4.0 technology

automation for production of yarn-weaving-dyeing-sewing; human resource development; and signing of 14 free trade agreements (including CPTPP, EVFTA) that will provide zero duty market access. While inviting Indian companies to invest in the field of yarn, weaving, dyeing and printing to take advantage of the market access provided by FTAs signed by Vietnam, he expressed hope that cooperation between India and Vietnam will be beneficial for both countries.

Dr. Siddhartha Rajagopal, Executive Director, TEXPROCIL informed that in the year 2018, while Vietnam's total Textile imports were US\$ 27.90 billion, it has imported textiles valued at US\$ 640 million from India. India's share in Vietnam's Textile imports is only 2.29 %. While India imported US\$ 7.31 billion textiles in 2018, it's textile imports from Vietnam were worth US\$ 300 million. Vietnam's share in India's textile imports is about 4.1 %. He invited Vietnamese companies to participate in IND-TEXPO (Reverse Buyer Seller meet), an exclusive B2B Exhibition of Cotton Textiles, that is organized by TEXPROCIL from 17-29 March 2020 in Coimbatore, Tamil Nadu, India.

Ms. Kalavathi Rao, Executive, SRTEPC informed that India is the 2nd largest producer of Man-made Fiber Textile (MMFT) globally and India exported more than US\$ 6 billion MMFT products to more than 150 countries in the world in 2018-19. India exported MMFT products to Vietnam valued at US\$ 103.74 million during the period 2018-19. India's share in the imports of Vietnam's MMFT product basket is about 3.34%.

After the Presentations, B2B Meetings were organized for all the 60 Indian participants with Vietnamese Buyers. The Programme was followed by Dinner organized by the Consulate General of India.

B2B MEETINGS IN PROGRESS



इस परिवर्तनशील समय में निर्यात के लिए दोहरा बीमा



निर्यातकों के लिए ऋण जोखिम बीमा
एवं

बैंकों के लिए ऋण जोखिम बीमा

आर्थिक अस्थिरता के इस समय में निर्यात के अनुकूल
ईसीजीसी के साथ ऋण जोखिम का बीमा कराएं।

अधिक जानकारी के लिए ईसीजीसी के निकटतम कार्यालय से
संपर्क करें।



ईसीजीसी लि.
(पूर्व में भारतीय निर्यात ऋण गारंटी निगम लिमिटेड)
(भारत सरकार का उद्यम)

वि.क्र.: NMD/197/214

बीमा आग्रह की विषयवस्तु है।
IRDA Regn.No.124
CIN No. U74999MH1957GO1010918

पंजीकृत कार्यालय: एक्सप्रेस टावर्स, 10वीं मंजिल, नरीमन पॉइन्ट,
मुंबई-400 021, भारत. टेली: 6659 0500 / 6659 0510,
फैक्स: (022) 6659 0517. टोल फ्री: 1800-22-4500.
ईमेल: marketing@ecgc.in • वेबसाइट: www.ecgc.in

आप निर्यात पर ध्यान केंद्रित करें. हम जोखिमों से रक्षा प्रदान करेंगे

VIEW OF THE BOOTHS AT VITA TEX, VIETNAM



SRTEPC'S Services to Indian Exporters



- Introduces Exporters to appropriate Overseas Buyers
- Provides up-to-date information and identifies potential markets for them
- Organises Export Promotion Programmes like Trade Fairs/Exhibitions, Buyer-Seller Meets in various overseas markets.
- Organising Reverse Buyer Seller Meets every year by which the overseas buyers are brought to India to discuss business with members
- Provides Grant for Market Access Initiative subsidy towards airfare for participation in promotional programmes like Exhibition/Fairs abroad (Member of the Council for the last year one year is a must)
- Conducts Workshops, Seminars to keep exporters abreast of latest development in policy/procedural matters, international trends, marketing strategies, government schemes, etc.
- Assist the exporters on Import-Export Policy and Procedures
- Resolve their problems about shipping and transport
- Maintain liaison with the Government authorities to convey the requirements of the industry and trade and help to bring about appropriate policy changes.
- Facilitates free display of samples at Council's Trade Centre in Mumbai and Surat frequented by overseas buyers and Trade Delegations
- Resolves problems of members connected with DGFT, Customs/Central Excise, GST, ROSL, Duty Drawback, Banking, ECGC, etc.
- Provides information on the trends for product development and adaptation to suit the overseas market requirements
- Issues export turnover certificates and certificate of origin.
- Visa facilitation to visit specified markets to discuss business with their target customers.
- Publication of Newsletter and regular circulars/letters to keep them aware of the activities of the Council and trade information.
- Collection and dissemination of Industry / Trade statistics to help members make their export strategy for export.
- Dissemination of information on foreign markets/emerging trends and trade enquiries
- Make them aware about different Anti Dumping duties as applicable in respective markets. From time to time also inform them about Sunset Reviews and give them timely information on questionnaire to be filled in, etc.
- Forex updates on WhatsApp.

If Undelivered, return to:
The Synthetic & Rayon Textiles Export Promotion Council
Resham Bhavan, 78, Veer Nariman Road, Mumbai - 400 020.