

वार्षिक प्रतिवेदन ANNUAL REPORT

2022-2023



SHEFEXIL

शेलाक एण्ड फाब्रेस्ट प्रोडाक्ट्स ऐक्सपोर्ट प्रमोशन काउंसिल
(भारत सरकार का वाणिज्य और मंत्रालय से प्रवर्तित)

Shellac And Forest Products Export Promotion Council

Formerly Shellac Export Promotion Council
(Sponsored by Ministry of Commerce & Industry, Govt. of India)

1/1, Wood Street (2nd floor), Kolkata - 700 016



SHEFEXIL





PAST CHAIRMEN OF THE COUNCIL GOVT. OFFICIALS	June 1957 & 1961 :	Shri C. R. B. Menon (Director General of DGCI&S)
	1962 :	Shri Ajit Mazoomdar (Jute Commissioner)
	1963 to 1966 :	Shri G. C. L. Joneja (Jute Commissioner)
	1967 & 1968 :	Shri P. C. Bhagat (Jute Commissioner)
	1969 to 1971 :	Shri S. P. Mukherjee (Jute Commissioner)

TRADE

1983 :	Shri S. S. Jayaswal
1984 :	Shri S. S. Jayaswal
1985 :	Shri S. S. Jayaswal
1986 :	Shri P. K. Singhanian
1987 :	Shri S. K. Saraf
1988 :	Shri S. S. Jayaswal
1989 :	Shri S. S. Jayaswal
1990 :	Shri J. P. Kanoria
1991 :	Shri S. P. S. Grover
1992 :	Shri K. B. Jayaswal
1993 :	Shri K. B. Jayaswal
1994 :	Shri S. S. Saraogi
1995 :	Shri S. S. Saraogi
1996 :	Shri S. K. Saraf
1997 :	Shri S. S. Saraogi
1998 :	Shri S. K. Saraf
1999 :	Shri S. K. Saraf
2000 :	Shri Prakash Thaker
2001 :	Shri Prakash Thaker
2002 :	Shri S. K. Saraf
2003 :	Shri S. K. Saraf
2004 :	Shri P. K. Saraogi
2005 :	Shri P. K. Saraogi
2006 :	Shri P. K. Shaw
2007 :	Shri P. K. Shaw
2008 :	Shri P. K. Shaw
2009 :	Shri Rajeev Kher, IAS Jt. Secy., Deptt. of Commerce, Govt. of India.
2010 :	Shri Rajeev Kher, IAS Jt. Secy., Deptt. of Commerce, Govt. of India.
2011 :	Shri Sudhir A. Merchant
2012 :	Shri Sudhir A. Merchant
2013 :	Shri PSSK Rajasankaralingam
2014 :	Shri PSSK Rajasankaralingam
2015 :	Shri G. L. Sarda
2016 :	Shri G. L. Sarda
2017 :	Shri Sumit Kr. Ghosh
2018 :	Shri Sumit Kr. Ghosh
2019 :	Shri Ashvin K. Nayak
2020 :	Shri Ashvin K. Nayak
2021 :	Shri Dilip Soni
2022 :	Dr. Lal Hingorani

Chairman :
Dr. Lal Hingorani

Vice Chairman :
Shri Anup Kr. Agarwala

Executive Director :
Dr. Debjani Roy

Registered Office :
Vanijya Bhawan, ITFC
1/1, Wood Street, 2nd Floor
Kolkata – 700 016
Tel : + + 91-33-2283-4417 / 4697 / 4698
Fax :+ + 91-33-2283-4699
E-mail:sepc@vsnl.net

Statutory Auditor :
M/s. R K Patodi & Co.
Chartered Accountants
2nd Church Lane, 4th Flr, Suit No. 404A,
Calcutta – 700 001.

Bankers :
State Bank of India
(Commercial Branch)
24 Park Street, Kolkata – 700 016.

Indian Overseas Bank
(Int. Business Branch)
6, Royd Street, Calcutta –700 016.

Central Bank of India
(Park Street Branch)
1, Park Street, Kolkata – 700 016



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Dr. Lal Hingorani Chairman

September 11, 2023

Dear Members,

It gives me immense pleasure to present the Annual Report of your Council for 2022-23. Given the tough global situation for trade and commerce in 2022-23, in the backdrop of the continuing Ukraine War and a changing geopolitical matrix, we have stayed relatively unaffected in terms of exports for the fiscal year in perspective. This is truly commendable and I want to thank each and every one of you for having done their best to take us forward in the path of growth. We have emerged stronger during 2022-23 despite tough challenges to record a better performance in our overall exports which stood at US \$ million 3579.44, up from the US \$ million 2779.66 in the previous fiscal. This augurs well for our sector exports in the current fiscal, providing the right momentum to finish strong in all our product segments, especially Lac and Lac-based products, Guar Gum value added and NTFPs.

In keeping with the call by our Hon'ble Prime Minister to work towards a more self-reliant India through 'Ease of doing Business' and 'Make in India' programmes, We are now preparing well to keep climbing the global value chain and emerge more competitive in world markets through new product development and an innovative marketing mix. A \$5-trillion Indian economy by 2025 is the immediate goal before us, and for achieving this, combined efforts are necessary to take our product exports to a new level, Yes. We need to work with a renewed vigour and face up to new challenges to increase export of our value-added agri products, particularly Lac and Lac-based products and Non Timber Forest Produce.

Despite some fresh challenges, we have scaled new heights in Guar gum and lac-based products, largely owing to greater value addition and adoption of well thought out programmes to develop industry competencies and a better product mix. But 'we still have miles to go before we sleep, to borrow a line from Robert Frost, the celebrated American Poet. Indeed, we still have to go the distance to conquer new frontiers, and for this, we need to put in greater efforts and adopt new initiatives.

India's export sector is still driven by low value added items that may not be able to bring high growth, and we need to evolve new initiatives in the coming years to climb the global value chain faster. Quite clearly, for this, our exports have to record exponential growth in value terms from here on, and I believe this can be achieved by adopting the high-value added products approach for all our product segments.

I take this opportunity to sincerely thank all Members, colleagues and other stakeholders for their dedicated approach, ideas and trust. I am confident this will propel us forward to go the extra mile to achieve greater success in the current fiscal.

Warm regards,

Yours sincerely,

(Dr. Lal Hingorani)
Chairman



MISSION STATEMENT

SHEFEXIL is run by a tri-directional mission to

- Strengthen plans and initiatives for products of exports.
- Maximize India's export potential through collective action.
- Assist the members of the Council to boost exports and discharge their responsibilities and obligations under Foreign Trade Policy.

VISION STATEMENT

- To realize the full potential of India's products of exports through collective action.
- To create a global brand for products in the basket of SHEFEXIL.
- To conceptualise plans and initiatives for exports of the products under the purview of the Council.
- To turn exports of the products as a tool for improving the lives of the poorer section of the population and develop the economically weaker sections of the society.
- Boosting employment oriented products of exports and ensuring infrastructure development in rural / tribal areas.
- To strengthen plans and initiatives for exports of the products under the purview of this Council.

THE COMMITTEE OF ADMINISTRATION OF SHELLAC & FOREST PRODUCTS EXPORT PROMOTION COUNCIL has great pleasure in placing before you the Annual Report of the Council for the year 2022-23. This is in keeping with the past practices and also consistent with our statutory obligations. Despite considerable seasonal variations in the volume and nature of trade, this present accounting and reporting period has been found to be most convenient and widely accepted.

THE YEAR IN PERSPECTIVE

During the year, Shellac EPC, now re-christened as Shellac & Forest Products EPC completed 66 years of existence. It is therefore, appropriate to take stock of the current status and state of its functioning.

3.1 Shellac & Forest Products EPC having its Registered Office at “Vanijya Bhawan”, International Trade Facilitation Centre, 1/1, Wood Street, 2nd Flr., Kolkata – 700 016, is registered under Section 25 of the Companies Act of 1956. It functions within the parameters and provisions of Chapter 3 of Hand Book of Procedures, Vol. I. and its major functions are

- (a) To provide commercially useful information and assistance to the members in developing and increasing their exports;
- (b) To offer professional advice to their Members in areas such as technology upgradation, quality and design improvement, standards and specifications, product development, innovation etc.;
- (c) To organize visits of delegations of its Members abroad to explore overseas market opportunities and interaction with importers abroad.
- (d) To organize participation in trade fairs, exhibitions and buyer-seller meets in India and abroad;
- (e) To promote interaction between the exporting community and the Government both at the Central and State levels; and
- (f) To build a statistical base and provide data on the exports and imports of the country, exports and imports of their Members, as well as other relevant international trade data.

3.2 Shellac EPC was set up in June 1957 with the following tasks :

- (a) To introduce orderliness and discipline and a sense of prospective in the Lac trade.

- (b) To strengthen the export focus and improve competitiveness in the export market and to enhance foreign exchange earnings from exports of Lac and its various products.

3.3. During the year the Council had 127 Ordinary members and 603 Associate members and 3 Govt. Nominees. (Total 730 Members)

3.4. Performance

- Increase in international trade
- New programs to develop industry competency
- Improvement in product mix
- Improvement in the marketing mix

3.5. New Frontiers New Initiatives

Till recently, the Council had been looking after the exports of Shellac and Lac based products only. The allocation of other Non Timber Forest Produce & their value added products not merely compliments the existing product basket of the Council, but also enhanced its size, responsibilities, multiplicity of tasks and operation levels several folds. Exports of Shellac & Forest Products EPC during FY 2022-23 stood at 3579.44 US \$ Million.

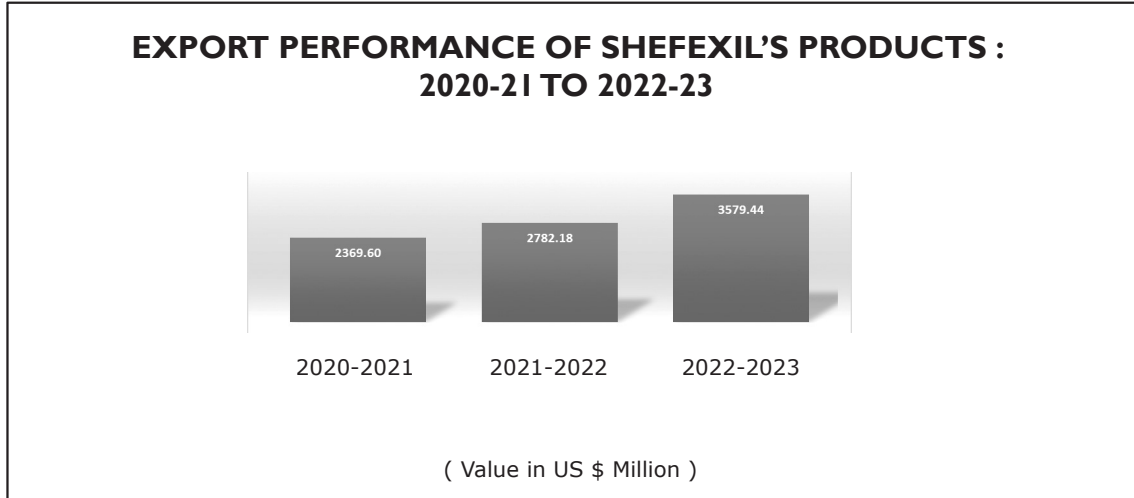
Exports from this sector may not be generating billions of dollars but the importance lies in generation of millions of jobs. According to a recent study done by Ministry of Environment & Forests, “Some 50 million tribal people depend on NTFPs for meeting their subsistence consumption and income needs”. We can bring about major growth in employment by boosting exports of NTFPs by trying to help this unorganized sector to turn more competitive and face effectively global challenges.

3.6 Major product groups

- Shellac & Lac based products
- Vegetable Saps & Extracts of Herbs
- Guar Gum
- Herbs
- Fixed vegetable, Oil cake and others
- Other vegetable materials
- Multi products belonging to the North Eastern region
- Nutraceuticals



3.7. Export performance of the Products basket of SHEFEXIL over the last 3 years



3.8. An international footprint of the product basket of SHEFEXIL

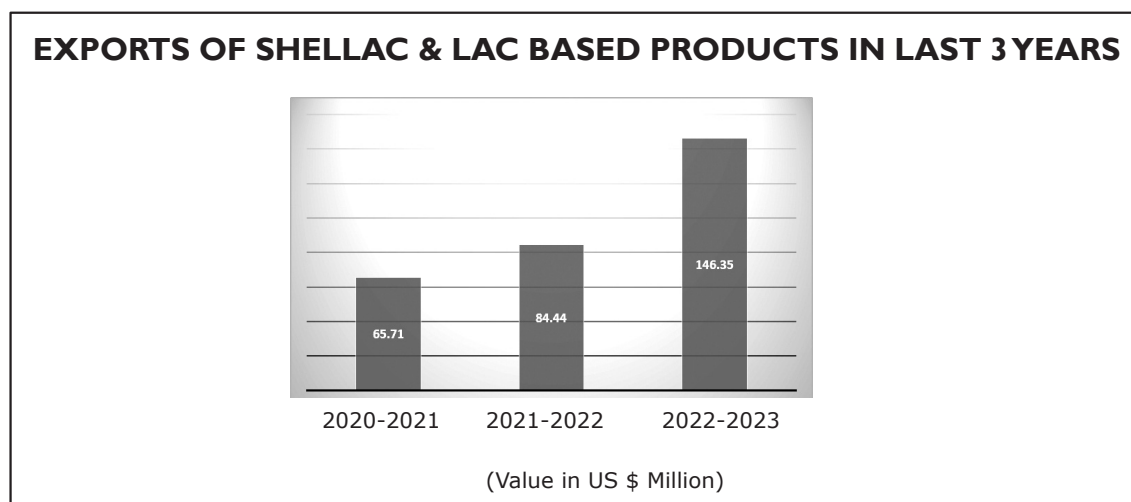
SHEFEXIL DATA ON TOP 20 EXPORT DESTINATIONS OVER THE LAST THREE YEARS

SHEFEXIL: ALL PANEL TOP 20 EXPORTING COUNTRY		April-MARCH 2021 (2020-21)		April-MARCH 2022 (2021-22)		April-MARCH 2023 (2022-23)	
SL.NO	Country	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn
1	USA	127963.10	818.07	169764.51	951.13	186527.65	1039.77
2	CHINA P RP	143670.88	192.84	139310.59	211.28	132873.26	248.89
3	GERMANY	47926.60	151.45	51895.18	172.82	74256.38	212.15
4	U ARAB EMTS	36699.58	91.53	52354.03	138.09	64296.42	146.60
5	U K	28491.67	81.53	27328.52	90.30	32780.52	126.36
6	AUSTRALIA	122493.26	72.64	22512.52	75.79	25892.22	87.30
7	KOREA RP	16761.33	52.25	22131.27	65.18	32013.70	100.04
8	RUSSIA	27050.30	41.34	42084.56	72.77	47776.77	102.72
9	NETHERLAND	18316.53	46.45	32879.56	70.87	48595.13	97.18
10	CANADA	16656.35	48.33	21038.96	59.09	27957.03	79.48
11	JAPAN	16577.36	54.20	16781.42	55.99	16237.68	58.40
12	ITALY	11213.13	44.29	10713.07	50.28	16793.86	66.87
13	FRANCE	6327.86	47.84	6794.67	50.85	7929.76	49.34
14	BANGLADESH PR	33398.45	40.17	34593.87	41.74	68880.52	53.04
15	NORWAY	34513.19	22.08	55553.83	44.21	81750.51	68.38
16	SINGAPORE	5345.67	38.66	5631.38	37.59	6159.02	38.68
17	INDONESIA	8402.66	19.61	9382.20	22.59	13143.48	49.99
18	NEPAL	25581.17	27.05	30424.38	31.65	40314.90	30.69
19	MEXICO	7368.94	16.31	9367.53	22.46	12886.30	47.34
20	EGYPT A RP	5487.23	8.64	6551.63	13.36	27195.16	58.70
TOP 20 ALL PANEL EXPORT TOTAL		640245.23	1915.27	767093.66	2278.03	964260.27	2761.93
GRAND TOTAL		825509.28	2369.60	942751.11	2782.18	1282248.79	3579.44



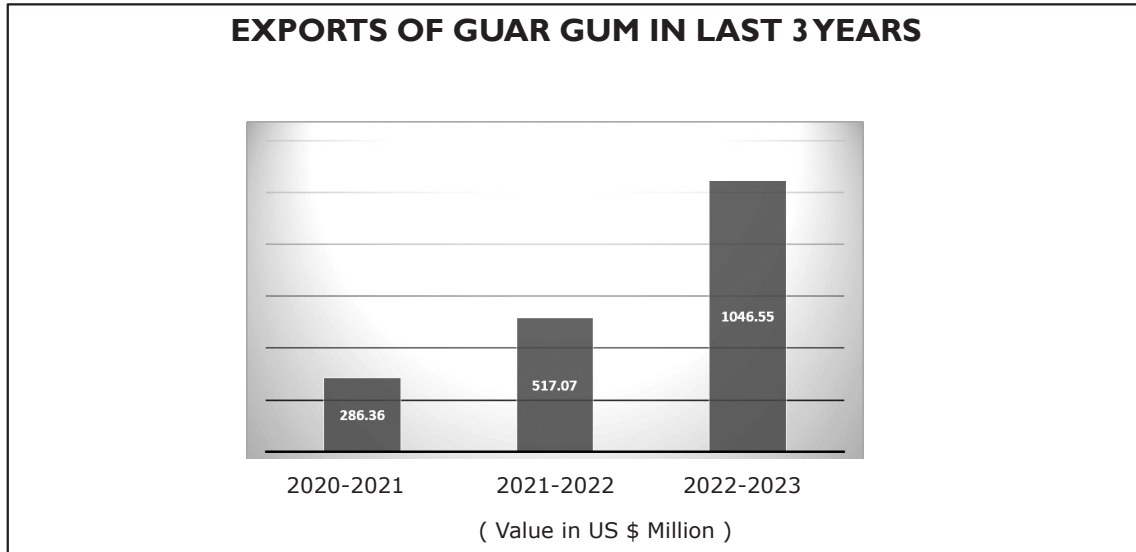
4. Export analysis of major product groups

❖ Shellac & Lac Based Product



❖ TOP 15 EXPORT DESTINATION SHELLAC & LAC BASED PRODUCTS

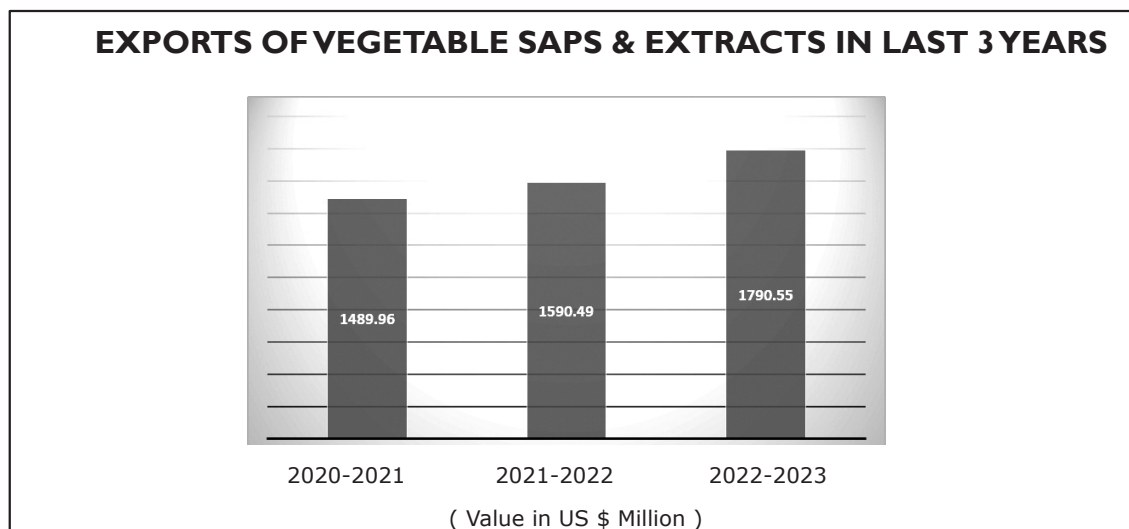
SHELLAC & LAC BASED PRODUCTS EXPORTING COUNTRY		April-MARCH 2021 (2020-21)		April-MARCH 2022 (2021-22)		April-MARCH 2023 (2022-23)	
SL.NO	Country	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn
1	U S A	1966.66	15.81	2522.64	26.78	1718.17	26.46
2	BANGLADESH PR	1646.08	10.82	1746.23	12.17	1294.28	11.81
3	U ARAB EMTS	193.07	1.53	157.23	1.39	551.84	10.80
4	SAUDI ARAB	1.00	0.02	2.00	0.05	519.29	10.70
5	NIGERIA	0.90	0.01	2.75	0.04	776.20	8.90
6	GERMANY	749.23	6.62	850.90	9.00	544.57	8.22
7	CHINA P RP	267.28	7.91	219.40	10.11	150.22	7.00
8	INDONESIA	168.00	1.29	72.00	0.71	354.99	4.70
9	MEXICO	11.90	0.60	27.40	1.64	132.11	3.74
10	SOUTH AFRICA	25.48	0.30	18.15	0.11	273.23	3.54
11	IRAQ	350.00	2.73	387.00	3.88	252.93	3.17
12	JORDAN	0.00	0.00	0.00	0.00	319.45	3.12
13	EGYPT A RP	163.00	1.35	56.25	1.22	413.21	2.79
14	SPAIN	178.05	1.50	122.05	1.44	284.35	2.74
15	BOLIVIA	5.00	0.09	66.25	0.84	145.00	2.45
	TOP 15 COUNTRY TOTAL	5725.64	50.57	6250.25	69.37	7729.84	110.14
	GRAND TOTAL	7177.18	65.71	7659.95	84.44	11288.63	146.35

❖ **Guar Gum**❖ **TOP 15 EXPORT DESTINATION GUAR GUM**

PANEL : GUAR GUM		April-MARCH 2021 (2020-21)		April-MARCH 2022 (2021-22)		April-MARCH 2023 (2022-23)	
SL.NO	Country	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn
1	USA	45507.59	61.08	80377.03	130.91	91542.02	197.01
2	CHINA P RP	32587.96	35.78	56465.21	72.58	69008.84	116.23
3	RUSSIA	24659.69	31.45	39694.26	60.99	44174.75	79.67
4	GERMANY	26455.38	31.60	30560.60	45.09	54644.85	76.40
5	NORWAY	34336.90	21.43	55340.47	43.49	81629.93	67.85
6	NETHERLAND	10557.93	8.95	22233.68	21.27	39428.99	47.34
7	U K	14150.58	11.72	13593.06	15.04	18173.11	43.68
8	EGYPT A RP	931.85	1.05	1205.71	2.20	23617.24	42.04
9	TURKEY	2760.73	2.60	2066.31	3.36	20627.07	29.98
10	CANADA	3974.85	5.12	7652.19	12.72	13041.21	26.58
11	SAUDI ARAB	728.25	1.17	790.21	1.36	15818.85	25.74
12	U ARAB EMTS	943.61	1.01	2181.75	3.37	14057.61	21.31
13	BELGIUM	1337.40	1.44	913.32	1.44	5649.38	17.44
14	AUSTRALIA	10202.44	9.64	8385.56	12.45	10820.42	16.62
15	ITALY	4042.49	5.11	3740.63	5.22	9500.50	14.39
	TOP 15 COUNTRY TOTAL	213177.65	229.15	325199.99	431.49	511734.77	822.28
	GRAND TOTAL	259058.23	286.36	378522.59	517.07	696691.54	1046.55

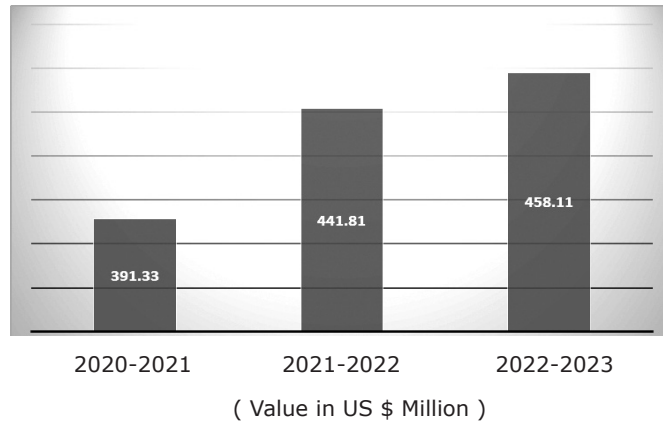


❖ Vegetable Saps & Extracts



❖ TOP 15 EXPORT DESTINATION VEGETABLE SAPS & EXTRACTS

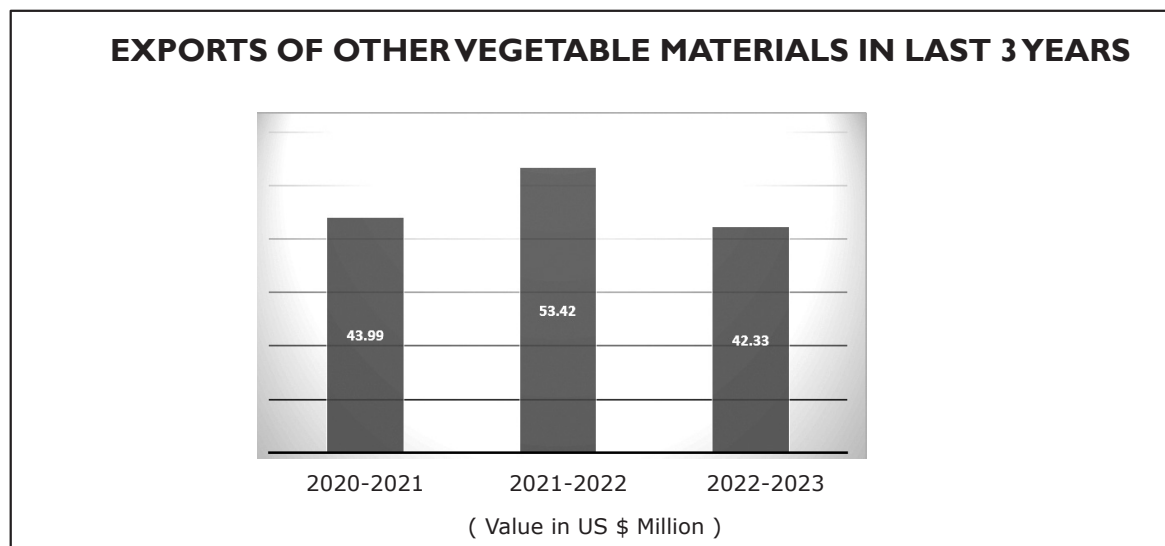
VEGETABLE SAPS & EXTRACTS (Added new HSN)		April-MARCH 2021 (2020-21)		April-MARCH 2022 (2021-22)		April-MARCH 2023 (2022-23)	
SL.NO	Country	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn
1	U S A	41757.48	587.20	48319.79	615.21	57571.61	639.43
2	U ARAB EMTS	27012.53	73.40	41935.71	118.13	40439.04	96.60
3	CHINA P RP	49125.94	111.98	33985.41	85.64	39342.34	92.37
4	KOREA RP	4175.86	41.12	4431.43	43.43	7038.23	67.74
5	GERMANY	6228.44	59.64	6425.12	56.37	5835.32	63.79
6	U K	9800.77	51.39	9691.21	56.74	10477.57	60.31
7	AUSTRALIA	9299.54	51.67	11116.15	50.79	12039.82	58.86
8	CANADA	9885.43	33.31	11195.42	34.68	12970.17	42.65
9	JAPAN	4308.70	34.14	3370.05	36.02	3720.15	34.42
10	NETHERLAND	3048.00	27.26	3835.83	34.19	3434.40	32.41
11	INDONESIA	3518.20	11.87	3488.75	11.91	5316.13	31.29
12	SINGAPORE	4281.38	35.30	4279.41	33.86	4140.58	31.09
13	FRANCE	1549.14	34.18	2206.29	35.06	1715.62	29.29
14	ITALY	1268.02	17.02	1651.32	20.81	2554.53	25.91
15	THAILAND	3899.51	10.82	1540.88	7.43	3230.53	20.92
	TOP 15 COUNTRY TOTAL	179158.94	1180.30	187472.77	1240.27	209826.04	1327.08
	GRAND TOTAL	281642.96	1489.96	282500.18	1590.49	322126.46	1790.55

❖ **Plant & Plant Portion (Herbs)****PEXPORTS OF PLANTS & PLANT PORTIONS (HERBS) IN LAST 3 YEARS**❖ **TOP 15 EXPORT DESTINATION PLANT & PLANT PORTION (HERBS)**

PLANT & PLANT PORTIONS (HERBS)		April-MARCH 2021 (2020-21)		April-MARCH 2022 (2021-22)		April-MARCH 2023 (2022-23)	
SL.NO	Country	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn
1	USA	29787.14	131.69	29792.97	150.23	27984.24	151.98
2	GERMANY	13588.68	51.60	13118.61	59.90	12617.38	62.35
3	CHINA P RP	17609.65	25.94	14826.53	27.15	15899.18	27.81
4	ITALY	2947.21	15.49	3642.70	19.28	2955.81	20.80
5	U K	2301.20	11.36	2044.45	11.89	2343.86	15.53
6	BANGLADESH PR	12717.80	12.99	12453.03	13.78	12431.15	12.00
7	NETHERLAND	2304.92	3.86	3912.41	9.06	3888.85	11.64
8	U ARAB EMTS	5663.86	9.82	5026.72	9.57	5508.21	10.94
9	KOREA RP	958.19	4.87	1734.09	10.53	1448.21	10.32
10	MEXICO	1900.39	4.43	2801.13	5.59	2716.05	8.26
11	FRANCE	1362.06	7.06	1589.56	7.73	1427.51	7.85
12	AUSTRALIA	1515.11	7.64	1401.19	8.03	1126.76	7.36
13	CANADA	1741.43	6.24	1286.21	7.07	1309.14	6.47
14	JAPAN	1704.44	7.48	1810.85	6.92	1305.34	6.13
15	PAKISTAN IR	33.00	0.23	324.15	2.03	889.82	5.87
	TOP 15 COUNTRY TOTAL	96135.08	300.70	95764.60	348.76	93851.51	365.31
	GRAND TOTAL	139448.96	391.33	133264.35	441.81	129856.76	458.11

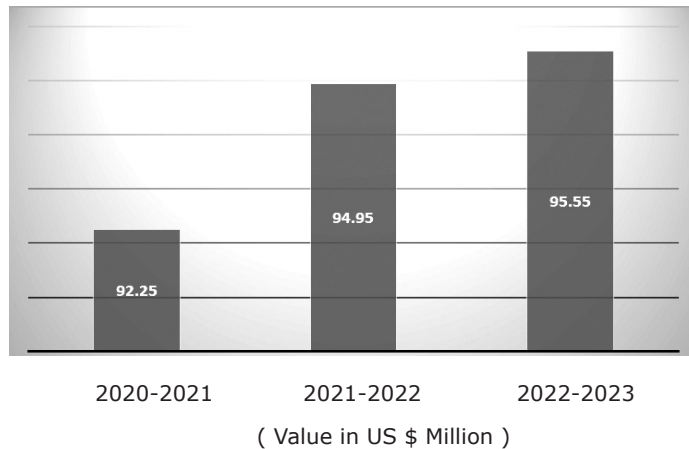


❖ Other Vegetable Materials



❖ TOP 15 EXPORT DESTINATION OTHER VEGETABLE MATERIALS

OTHER VEGETABLE MATERIALS		April-MARCH 2020 (2019-20)		April-MARCH 2021 (2020-21)		April-MARCH 2022 (2021-22)	
SL.NO	Country	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn
1	SRI LANKA DSR	2580.87	8.90	2784.40	9.26	1523.17	4.99
2	CHINA P RP	41772.06	10.71	32717.44	15.22	7550.79	4.78
3	BHUTAN	6660.38	0.66	10477.91	3.40	19118.69	4.49
4	JAPAN	6992.86	4.81	8381.92	4.48	6110.00	4.39
5	U S A	1108.10	2.12	801.07	2.34	955.72	2.56
6	U K	549.73	0.90	830.93	1.56	982.96	2.36
7	U ARAB EMTS	1082.10	1.23	1371.10	1.51	1777.08	1.84
8	SAUDI ARAB	1728.45	0.92	590.58	0.35	3429.35	1.77
9	SOUTH AFRICA	173.50	0.33	547.98	0.90	774.30	1.47
10	SPAIN	467.73	0.76	713.51	0.93	923.12	1.42
11	NEPAL	1237.88	1.67	1006.24	1.65	1424.87	1.29
12	TURKEY	452.41	0.59	625.83	0.91	621.32	0.82
13	NIGER	110.95	0.33			288.58	0.82
14	AUSTRALIA	91.17	0.35	174.43	0.44	792.66	0.75
15	GERMANY	461.96	1.00	506.04	1.21	268.31	0.64
	TOP 15 COUNTRY TOTAL	65470.15	35.28	61529.38	44.16	46540.92	34.39
	GRAND TOTAL	75788.29	43.99	72704.47	53.42	57113.52	42.33

❖ **Fixed Vegetable Oil, Cake & Others****EXPORTS OF FIXED VEGETABLE OIL, CAKE & OTHERS IN LAST 3 YEARS**❖ **TOP 15 EXPORT DESTINATION FIXED VEGETABLE OIL, CAKE & OTHERS**

FIXED VEGETABLE OIL, CAKE & OTHERS		April-MARCH 2020 (2019-20)		April-MARCH 2021 (2020-21)		April-MARCH 2022 (2021-22)	
SL.NO	Country	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn
1	U S A	7836.13	20.17	7951.01	25.66	6755.89	22.33
2	KOREA RP	10485.47	4.36	14123.78	7.36	16277.67	6.67
3	MEXICO	2150.96	5.15	1171.08	2.97	2488.75	6.38
4	U ARAB EMTS	1804.41	4.54	1681.52	4.12	1962.64	5.11
5	ITALY	2831.12	6.05	1374.87	3.48	1614.27	4.40
6	NETHERLAND	2215.40	6.09	2701.75	5.71	1475.35	4.10
7	MALAYSIA	2571.55	4.35	1234.39	2.85	1860.73	3.98
8	TAIWAN	1586.79	1.78	1436.68	2.27	2152.26	3.89
9	AUSTRALIA	1361.07	3.01	1415.08	3.78	1084.75	3.10
10	VIETNAM SOC REP	1391.58	1.74	467.49	1.18	1262.27	2.82
11	U K	1602.78	5.08	1026.71	2.94	707.23	2.80
12	SINGAPORE	678.35	2.49	636.96	2.09	653.00	2.52
13	SPAIN	559.72	0.96	713.00	1.76	771.38	1.98
14	NEPAL	5804.64	1.27	11937.62	4.48	8906.63	1.97
15	CANADA	902.03	2.75	694.01	2.50	456.36	1.90
	TOP 15 COUNTRY TOTAL	43782.00	69.79	48565.95	73.15	48429.18	73.95
	GRAND TOTAL	62393.66	92.25	68099.57	94.95	65171.88	95.55



5.1 Activities undertaken

Promotional Awareness Seminars / Exhibition organized by the Council :

- Participated in 5th FUP Technical meeting on ETO with EU Commission held on 5 April 2022 to promote Guar Gum, Botanical Extracts used in Food Supplements in EU to promote exports of the said products.
- Meeting / Interaction with CIM with EPCs for fixing export targets for the year 2022-23.
- Foreign Embassy reach out with Embassy of China regarding Registration of SHEFEXIL products being exported to China. falling under the TCM product category.
- Reach out with Laboratories regarding Toxicity Study of Shellac (E 904) as per Addl. information sought by EFSA.
- Initiated dialogue with IIFT, Kolkata for GI tags of indigenous SHEFEXIL products of West Bengal.
- Identification of 75 ITC(HS) codes along with assessment of market potential for preparation of a coffee table book to promote the sector. Work in progress slides for SHEFEXIL's export marketing collateral attached.
- Identification of Focus Markets and Focus Products and Policy Interventions sought to promote Exports.
- Representation on the prohibition of the export of Guar seeds prepared, and the matter taken up with the O/o the DGFT.
- Panelwise issues taken up during the meeting with EPCs chaired by HCIM was also flagged with the O/o. DGFT and EP(CAP) Divn.
- Review Meeting with EPCs to discuss export performance and ATR on KRA under chairmanship of JS(MC).
- Meeting of Sub Committee of MAI on 20 May 2022 at 11 AM to 1 PM over VC.
- Export Trend during last 12 Years (2010-11 to 2021-22) attached herewith.
- SHEFEXIL has been inducted into the Core Group on Horticultural products including Betel Leaves, Medicinal Plants Fruits/Marketing” under the chairmanship of Dr Subrata Gupta, IAS, Addl. Chief Secretary, FPI and Horticulture Department, Government of West Bengal. A workshop with Representatives of Food Testing Laboratories & FPOs was held on 22nd August, 2022, presentation attached herewith in this regard.
- Hon'ble CIM's meeting with EPCs on 5th August, 2022.
- Workshop on promotion of horticulture, fruits & vegetables at Salt Lake jointly with Deptt. of Food Processing Industries and Horticulture, Government of WB.
- Meeting under the chairmanship of Shri Manish Chadha, Joint Secretary, EP(CAP) Division to discuss about progress and status of the 6th edition of CAPINDIA event.
- Discussion with DGCI&S with the Exporters
- Stakeholder Workshop/ consultation on MAI Scheme on 19th Sept., 2022.
- Participated in the Meeting by Hon'ble Commerce and Industry Minister with EPCs to review export performance on 7th October , 2022.
- Participated in 25th Meeting of Brushware, Polishes, Lac and Lac Products Sectional Committee CHD 23 over VC 10th October 2022 –
- Participated in the Review meeting on Inputs for list of items of interest for imports from India by Russia, Chaired by Shri Manish Chadha, JS on 4th November 2022.
- Participated in the Meeting by Hon'ble Commerce and Industry Minister with EPCs on 7th November, 2022
- Attended Meeting on development of PLI scheme for the Nutraceutical products at New Delhi on 22nd November, 2022.
- Attended the Buyer Seller Meet on the Agarwood Products at Agartala, Tripura, organized by the Forest Deptt., Govt. of Tripura on 24th November 2022.
- Attended VC Meeting to discuss regulatory requirements for registration in CIFER system of GACC, China and compliances for registration with deptt. of Plant and Animal Quarantine China on 2nd Dec., 2022.
- Attended VC Meeting with stakeholders to discuss International Trade Settlement in Indian Rupees (INR) under the co-Chairmanship of Secretary (DFS) and Secretary (Commerce) 5th Dec., 2022
- Attended VC Meeting on Steering committee meeting on CAP India to be chaired by Shri Manish Chadda, Joint secretary, Dept. of Commerce on 6th December, 2022.
- SHEFEXIL along with its 15 member-exporters participated in the meeting held on 19th Dec., 2022 chaired by Secretary, MoFPI on Formulating PLI scheme for Nutraceutical Sector and has prepared a draft framework for eligible products, criteria and other conditions under the upcoming PLI scheme for Nutraceutical Products.
- SHEFEXIL facilitated issuance of the Notification on Guidelines for Registration of Farms in West Bengal



for the export of Fresh Betel Leaves to the European Union as per the Standard Operating Procedure for Export Inspection & Phytosanitary Certification of the said Betel Leaves to the EU countries, laid down by the Govt. of India, Notification No. 20-FPIH-17014/18/2022-SECTION dtd. 4th Jan., 2023 issued by Deptt. of Food Processing Industries & Horticulture, Govt. of West Bengal,

- SHEFEXIL arranged for an Webinar on 17th Jan., 2023 on the RoDTEP scheme on anomaly in RoDTEP rates for Extracts Industry.
- SHEFEXIL, in association with Indian Institute of Foreign Trade (IIFT), Kolkata has arranged for an Online Training Programme on Digital Marketing for E-Commerce (e-lecture series) during the period 18th Jan. to 3rd Feb., 2023.
- SHEFEXIL, jointly with Zonal DGFT office, Nagpur and APEDA organized outreach seminar at Raipur, Chhattisgarh on 13th March 2023.
- SHEFEXIL, jointly with Zonal DGFT office, Nagpur and EEPICINDIA organised outreach seminar at Durg, Chhattisgarh on 14th March 2023
- SHEFEXIL, jointly with Zonal DGFT office, Kolkata and Indian Chamber of Commerce, organised an Workshop on Niryat Bandhu Scheme in Kolkata, West Bengal on 22nd March 2023.
- SHEFEXIL awarded the project for applying for GI Tagging of Betel Leaves to IIFT, Kolkata to promote export of betel leaves.

5.2 Strategy to maximize exports of products under the purview of this Council

Strategic Objectives

- Achieve desired market shares in the focus markets
- Establish vertical linkages to scale up.
- Productivity
- Improvement in quality
- Consistency
- Competitive edge
- Focus on value additions through product development
- Develop Brand India for sustainable market impacts
- Evolve an inclusive growth model to partner rural poor.

Strategic Initiatives

- Strategy 1 – Increasing the supply of focus products to propel exports from India.
- Strategy 2 – Product and application research to go up on the value chain.
- Strategy 3 – Market development

- Strategy 4 – Development of Brand India

Programme for Inclusive Growth

Concept

Program tackles the lack of growth of the focus products integrated with the interests of tribal cultivators, who are among the most deprived rural poor and include large percentage of women.

Objectives

- Increase production of the products under the purview of this Council significantly in India by 2023.
- Target benefits to beneficiaries – by augmenting their annual income significantly.
- Establish processing units in the growing areas to create an integrated Development model.

6. RESOURCE MOBILISATION

6.1 During the year the number of Members of the Council was 730. The main sources of revenue of the Council are as follows :

- Membership Fees.
- Service charges towards issuance of Quality Certificate for Shellac & lac based products.
- Service charges for Registration of Shellac & Lac based products.
- Laboratory Service Charges.
- Processing fees for issuance of Endorsement and Health Certificates for export of food grade Guar Gum to EU.
- Processing fees for issuance of Certificate of Registration for Gum Karaya.
- Processing fees for issuance of Official Certificates for export of Betel Leaves to EU & UK.
- Processing fees for issuance of Official Certificates for export of Food Supplementants containing Botanicals to EU & UK.

6.2 In view of the limited membership and limited value of exports, the internal generation of funds continue to remain inadequate. Considerable resources are necessary for maintaining the field level extension services taking up new initiatives and action plans and discharging responsibilities as nodal EPC for NTFPs and its value added variants.

The Council therefore, had to re-orient its activities to draw resource under various ongoing programmes / schemes of Other Ministries of Central and State Governments.

7. SUPPORT AND ESCORT SERVICES



7.1 The Council is re-focusing its services and diversifying its activities to meet the felt requirements of its members. These include :

- (a) Availability of trade related data and information.
- (b) International production and price trends and preferences.
- (c) Situation in the competing countries and major consuming countries.

For this, the Council has stepped up its networking with other service provider/research organizations and Inspection Agencies.

7.2 The Council maintains one Analytical Laboratory at Balarampur in the district of Purulia, West Bengal and carried out Laboratory test of samples for local testing as well as for export consignments. During the year, dock samples were tested on a routine basis along with samples received from individual exporters to assess the quality. The facilities for sophisticated analytical tests like determination of acid value, saponification value, Iodine Number assessment, etc. have also been developed in our Laboratory and were made available to the Members during the year under review.

It is the only Export Promotion Council in India which is doing Quality Control at the export stage, conducting research, covering the interests of the Growers at the grass-root level and thus, in a way performing the activities of a Commodity Board, which otherwise is run on full government grant.

7.3 The Council is uniquely placed to directly transfer the benefits of success in the International markets to the tribal people who are actively engaged in cultivation, gathering, production and processing of NTFP's. It is estimated that 50 million rural poor and tribals are economically dependent on NTFP's in India. The Council has consciously initiated integrated Development programmes which on one hand promotes the exports of NTFP's & making this exports sustainable through brand promotion & product development and on the other hand, augments income generation capabilities of the Tribals by creating backward linkages into organized cultivation. This is done by generating momentum, by bringing a partnership between NTFP's growers / gatherers & exporting community. Programs enhancing Industry competency & the spin off benefits of employment generation amongst poorer sections attached with Non Timber Forest Produces as planned by the Council.

8. ORGANIZATIONAL MATTERS

8.1 The organizational matters need due attention and

consideration for overall improvement, functioning of the Council. To provide services to address the felt requirements of the Members, the Council is required to follow up systematically and submit representations to the different Government Authorities and to this end, the Secretariat needs to be adequately strengthened.

8.2 Membership

The Membership of the Council stood at 730 as on 31st March, 2023. The Council functions under the overall control and guidance of its Committee of Administration (COA). The members met periodically during the year under report and deliberated upon matters pertaining to export and other related problems. The export promotional measures and ways and means to boost exports were also discussed in these meetings. Based on the advice of Members, the Committee of Administration of the Council formulated export targets and also set plans of action for export developments.

8.3 Office Set Up

No additional branch or Regional Office was set up during the year under review.

8.4 Meetings

Meetings, including specials meetings with State/ Central Govt., COA meetings and Interactive meetings with the Director General of Foreign Trade, Govt. of India were held during FY 2022-23. Various issues like planning and formulation of export plan, overseas market development, facilities/assistance needed for export promotion / publicity / measure etc. to boost export and other problems concerning the Council were discussed and decisions taken thereon.

8.5 Use of Hindi in the working of the office

All members, the officers and staff are Hindi literate. While communicating with the State Govt. and local level agencies, Hindi is used to the maximum extent.

8.6 Welfare of Schedule Caste / Schedule Tribes / OBC

This matter is high on the agenda and priority of the Council.

9. The Non Timber Forest Produce Information Centre (NTFPIC) — A one-stop Cell for all information related to NTFPs.

The Council has launched a Non Timber Forest Produces Information Centre (NTFPIC) — a one-stop cell for all information related to NTFPs.

- To build a community of Stakeholders by bringing producers, traders, co-operatives and exporters



under its umbrella and providing them a platform to highlight the problems faced vis-à-vis support measures needed for export development.

- To nurture and develop new and upcoming exporters.
- To develop International competitiveness.
- To identify scope and export potential for Non Timber Forest Produces.
- Of capacity building through market specific and product specific programmes.
- Of creation and development of comprehensive market information system.
- To interact with state level agencies dealing with procurement, processing and marketing of NTFPs and providing them information on global market opportunities.
- To ensure full utilization of NTFPs in tribal areas by exploring new uses for products and by improving their marketability through organized efforts abroad and through formulation of suitable export promotional schemes and activities.
- Market reports highlighting current trends of market and demands of Councils products in various countries were prepared and circulated among the members during the year under review.
- Overseas enquiries were circulated among the concerned member firms.
- Names of the overseas buyers of the items concerned coming under Council's purview, were also supplied to the members on request.
- Computers and electronic mail services have been upgraded in the Council's offices to gear up the services to the Members.
- Council's website on the internet www.shefexil.org for giving wider projection of Council's products among the business community worldwide.

10. INTERFACE WITH THE GOVT.AND INPUTS FOR POLICY ETC.

The Council and its members have been in touch with the Govt. agencies on a regular basis. During the year under report, several representations/recommendations were addressed to different Government departments, both Central and State for modification in the Foreign Trade Policy and Procedure, notifying products, removal of export operational constraints leading to acceleration in export growth, extension of certain facilities for boosting up export

of Council's products and some of these suggestions / proposals were partially or fully accepted by the Govt. Besides, necessary feedback required by the concerned authorities from time to time, the Council also prepared and submitted policy suggestions for FY 2022-23, among others.

It must be stressed that this aspect of the activity of the Council is very important and needs to be properly addressed. It is a fact that because of low value of export, the visibility of the Council and the product as a whole tends to be low. Yet, it is like a sleeping beauty who needs a dear and affectionate touch to spring up. As stated earlier, the potential for growth is real and true and is very much there. Nor will this be investment intensive. It is necessary that the initiatives of the Council are not seen as efforts to seek more entitlement but as efforts to focus avoidable cost centres or cost-points such as incidence of local level taxes, low weightage on timely clearance & movements of Export Consignments etc.

Considering the nature of the products, the export intensity and mandate of the Council, the Council should play the role of and have the status of a Commodity Board for total, integrated and holistic development of Lac and other NTFPs based Industry.

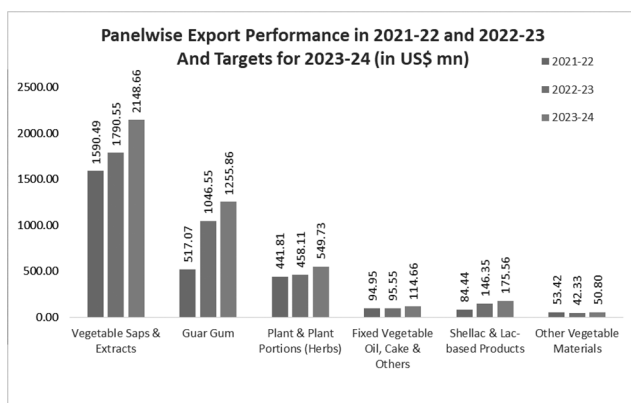
11. EXPORT OPERATIONAL CONCERNS AND ASSISTANCE

The Council rendered necessary assistance to individual member-exporters to overcome their day to day operational problems regarding delay/non-settlement of pending benefits. An indication as to the type of cases handled and settled by the Council during the year under report can be had from below :

1. Case of Advance License and other taken up with DGFT/Zonal Jt. DGFT, Customs, Excise etc.
2. MAI Scheme.
3. Recommendation for Visa/Passport.

Apart from the above, the Council continued its efforts to provide timely assistance to Shellac exporters for speedy execution of Export orders and finding solutions to the concerns related to exports through liaison with various agencies. The Council has also continued its effort to settle disputes/complaints between the exporters and importers of shellac. During FY 2021-22 the complaints received were attended to for amicable

settlement.



12. OUR GOALS AND CHALLENGES

Inherent Characteristics of Our Canvas

- Per capita exports is low (Total exports/Activity population)
- Converse – Employment per Rs million exports is high
- Focus Employment of Tribals and Women
- Exports in the hands of MSME's.
- Continue to be in the mould of a Cottage & SSI Industry
- Business will not reach critical mass to trigger character changes
- A doubling of exports will result in.....100% increase in the income of the focus Group

The tactical path to goal achievement

- **The Marketing Initiatives**
 - **Marketing Programmes**
 - Initiate Industry level brand promotion initiatives.
 - Implement marketing initiatives

- BSMs
- Participation in Trade fairs
- Panel specific Trade Delegations
- Selective advertising

Information & Quality Assurance Support

- SHEFEXIL Information Cell– to harness information & disseminate the same to the Stakeholders to develop International competitiveness
- Provide Technical & Quality Assurance assistance for enhancing reach and acceptability of botanical Herbs in global markets

Addressing the Industry competencies

- Competency development and increased opportunities
 - Training & Skill upgradation for tribal population living near Indian forests
 - Entrepreneurship development programmes among tribal youth
 - Sustainable employment generation for tribal women

Consolidate NTFPs trade

- Entrepreneurship development programme
- Collaborate with Forestry and Agricultural Institutes
 - For Value addition of these products
 - Training of New entrepreneurs
 - Aimed at the Tribal youth

Reduce Risks associated with vagaries of nature

- Financially viable and sustainable Insurance scheme
 - For the growers
 - During cultivation, collection and storage of NTFPs
 - Against traditional vagaries of Nature

**MEMBERS OF THE PRESENT COMMITTEE OF ADMINISTRATION OF THE COUNCIL**

1.	DR. LAL HINGORANI CHAIRMAN, SHEFEXIL PANEL : VEGETABLE SAPS & EXTRACTS OF HERBS INDUSTRY M/s. PHARMANZA HERBAL PVT LTD PLOT NO.214, NR. VADADLA PATIA, BORSAD TARAPUR ROAD, AT:KANIYA, TAL:PETLAD, DIST. ANAND - 388435, GUJARAT	2.	SHRI ANUP KUMAR AGARWALA CHAIRMAN, SHEFEXIL PANEL : SHELLAC & LAC BASED PRODUCTS INDUSTRY PARTNER M/s. RAJ KUMAR SHELLAC INDUSTRIES BHAGAT CHAMBER, 12A, N. S. ROAD, 5TH FLOOR, ROOM NO. 1, KOLKATA - 700 001, WEST BENGAL
3.	SHRI HEMANT SARAF PANEL : SHELLAC & LAC BASED PRODUCTS INDUSTRY CEO M/s. SITARAM SARAF 86, RAJA BASANT ROY ROAD, KOLKATA - 700 029, WEST BENGAL	4.	SHRI PRADEEP KUMAR SHAW PANEL : SHELLAC & LAC BASED PRODUCTS INDUSTRY DIRECTOR M/s. HIND SUTER SHELLAC P. LTD. 49/K, DR. ABANI DUTTA ROAD, SALKIA, HOWRAH - 711106, WEST BENGAL
5.	SHRI SANJAYA JAYNISH MARIWALA PANEL : VEGETABLE SAPS & EXTRACTS OF HERBS INDUSTRY DIRECTOR M/s. OMNIACTIVE HEALTH TECHNOLOGIES LTD. PLOT NO. 38, 39 & 5 C, INTERNATIONAL BIO-TECH PARK, PHASE-II, VILLAGE HINJAWADI, TAL-MULSHI, DIST-PUNE 411 057 MAHARASHTRA	6.	DR. M MAJEED PANEL : VEGETABLE SAPS & EXTRACTS OF HERBS INDUSTRY MANAGING DIRECTOR M/S. SAMI LABS LIMITED 19/1 & 19/2, 1ST MAIN, 2ND PHASE, PEENYA INDUSTRIAL AREA, BANGALORE - 560058, KARNATAKA.
7.	SHRI DILIP KR. SARDA PANEL : GUAR GUM INDUSTRY PARTNER M/s. SARDA GUMS & CHEMICALS 14/16, OVALWADI, VITHALWADI, BAJAJ CHAMBER, KALBADEVI ROAD, MUMBAI – 400002.	8.	SHRI DILIP SONI PANEL : GUAR GUM INDUSTRY DIRECTOR M/S. SHREE RAM COLLOIDS PVT. LTD. E-1-16, 17, AGRO FOOD PARK, BORANADA, JODHPUR - 340052, RAJASTHAN.
9.	SHRI MITUL SHAH PANEL : GUAR GUM INDUSTRY DIRECTOR M/s. RAMA GUM INDUSTRIES (INDIA) LIMITED R.S. NO. 125, PLOT NO. 10 TO 15, & 31 TO 36, NEAR GIDC, PATAN ROAD, DEESA - 385535, GUJARAT	10.	SHRI ASHVIN K. NAYAK PANEL : HERBS INDUSTRY DIRECTOR M/S. KANAIYA EXPORTS PVT. LTD. BUNGLOW NO. 3 UGATI BUNGLOW, OPP. NANCY PARLOUR, NR., AKSHAT AANGAN AP., VISHWAS CITY -2 ROAD, GHATLODIA, AHMEDABAD, GUJARAT -382481.



11.	SHRI V. KRISHNA SHANKAR PANEL : OTHER VEG. MATERIALS INDUSTRY DIRECTOR M/S. SUBRAMANY & CO(EXPORTS) PVT. LTD. OLD NO. 9 & 10, NEW NO. 24 & 26, NEW COLONY, TUTICORIN - 628003, T.N.	12.	
GOVT. NOMINEES			
13.	SHRI MANISH CHADHA JT. SECRETARY TO THE GOVT. OF INDIA DEPTT. OF COMMERCE, EP(CAP) DIV. UDYOG BHAWAN, ROOM # 233 NEW DELHI - 110 011.	14.	THE DIRECTOR INSTITUTE OF FOREST PRODUCTIVITY (INDIAN COUNCIL OF FORESTRY RESEARCH & EDUCATION) ARANYODAYA, IPKI ROAD AT & P.O. : LALGUTWA (VIA PISKA NAGRI) RANCHI – 835 303.
ALTERNATE NOMINEE			
15.	SHRI SENJEET KUMAR DIRECTOR TO THE GOVT. OF INDIA, DEPTT. OF COMMERCE, EP(CAP) DIV. MINISTRY OF COMMERCE & INDUSTRY UDYOG BHAWAN, ROOM NO. 285 NEW DELHI - 110 011		



ACKNOWLEDGEMENT

The Committee of Administration of Shellac & Forest Products EPC wishes to place on record its sincere thanks to all the members of the Council for their wholehearted co-operation in the matter of export promotion of Non Timber Forest Produces and its value added variants.

The Committee of Administration of Shellac & Forest Products EPC also wishes to place on record its grateful thanks to the Ministry of Commerce and Industry, Department of Commerce, Govt. of India for its continued support and assistance.