

वार्षिक प्रतिवेदन ANNUAL REPORT

2023-2024



SHEFEXIL

शेलाक एण्ड फाबेस्ट प्रोडाक्ट्स एक्सपोर्ट प्रमोशन कौंसिल
(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 :	Shri Dilip Soni
2023 :	Dr. Lal Hingorani
2024 :	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:shefexil@gmail.com

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



CONTENTS

	Page No.
1. Mission Statement	06
2. Vision Statement	06
3. The year in perspective	07
4. Export analysis of Major Product Groups	08
5. Strategy to maximize exports of products under the purview of this Council	16
6. Resource mobilization	17
7. Support and escort services	17
8. Organizational matters	17
9. The Non Timber Forest Produce Information Centre (NTFPIC) - A one-stop cell for all information related to NTFPs	18
10. Interface with the Govt. and inputs for policy etc.	18
11. Export operational concerns and assistance	19
12. Our Goals and Challenges	19

Annexure

I. Members of the present Committee of Administration of the Council	20
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Dr. Lal Hingorani Chairman

Dear Members,

September 30, 2024

I have great pleasure in placing before you the Annual Report of your Council for 2023-24. We have traversed another tough year of global uncertainties in international trade with ups and downs, and have emerged successful with a 21.40 per cent growth in our total exports. I attribute this success entirely to the combined efforts of all Members and team SHEFEXIL, who worked tirelessly to keep the Council's flag flying high despite heavy odds.

Given the unchanging global economic scenario, as outlined by the IMF in their World Economic Outlook Report for 2023-24, ("the baseline forecast is for the world economy to continue growing at 3.2 percent during 2024 and 2025, at the same pace as in 2023), our exports have done fairly well, up from US \$ million 2862.84 in 2022-23 to US \$ million 3452.27 in 2023-24. We have weathered the storm, both domestically and globally to emerge tougher in 2023-24, and now well poised to scale greater heights in the three key products groups of Lac and lac-based items, Guar Gum Value-added and Nutraceuticals & and Non Timber Forest Produce, Vegetable saps and herbal extracts and botanicals.

I want to congratulate each and every Member for giving his best shot to keep the Council steadily in the growth path and striving for excellence in all product groups. From here on, we need to fire on all cylinders to carve a niche for our main products in the major markets of the world. The presentation of the full Budget by our Hon'ble Finance Minister with special focus on the MSME sector should motivate us to climb the global value chain more easily in the current fiscal. We need to prepare for tougher competition in world markets through new product development, especially in nutraceuticals and Guar Gum value-added and for this, we need to aim at innovative marketing techniques, especially for our herbal extracts-based products.

There is no gainsaying the fact that the MSME export sector urgently needs reforms in certain Customs and banking rules, access to bank credit and incentives on par with China. Some trade experts are convinced this will help boost India's exports through the e-commerce medium to USD 350 billion by 2030. According to a recent Global Trade Research Initiative report, there is a need to create separate regulations and ecosystems to support two different types of e-commerce exports - direct export and overseas warehouse models;

It makes us proud that we are perhaps the only Export Promotion Council in India 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. Considering the nature of the products dealt with, the export intensity and mandate of the Council, SHEFEXIL can be accorded the status of a quasi Commodity Board for total, integrated and holistic development of Lac and other NTFP-based products.

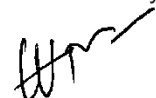
Most importantly, our Council is uniquely placed to directly transfer the benefits of success in the International markets to the tribal families back home who are actively engaged in cultivation, gathering, production and processing of NTFPs. It is estimated that some 50 million rural poor and poor tribals are economically dependent on NTFP's in India, and we in SHEFEXIL have consciously initiated integrated Development programmes which not only promote exports of NTFP items, but also make such exports sustainable through brand promotion and new product development.

Dear Members, I need to remind you that India's export sector (mainly agri products) is still largely driven by low value added items that may fail to fetch high growth. We need to make better use of the Government schemes like PLI, and lift our manufacturing exports to newer heights by venturing into new markets. Our focus has to get sharper to carry forward the Made in India brand and explore the uncharted territories to attract new buyers. Embracing the high value added route for all our export products, I feel, can bring in ample returns and also strengthen India's position as a reliable supplier of quality goods in the global arena.

I take this opportunity to sincerely thank all Members, colleagues and other stakeholders for their strong support through new ideas in export promotion. I am confident this will propel us forward to reach our aspirational goals in the near future.

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 2023-24. 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 67 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 85 Ordinary members and 939 Associate members and 3 Govt. Nominees. (Total 1024 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 2023-24 stood at 3449.69 US \$ Million.

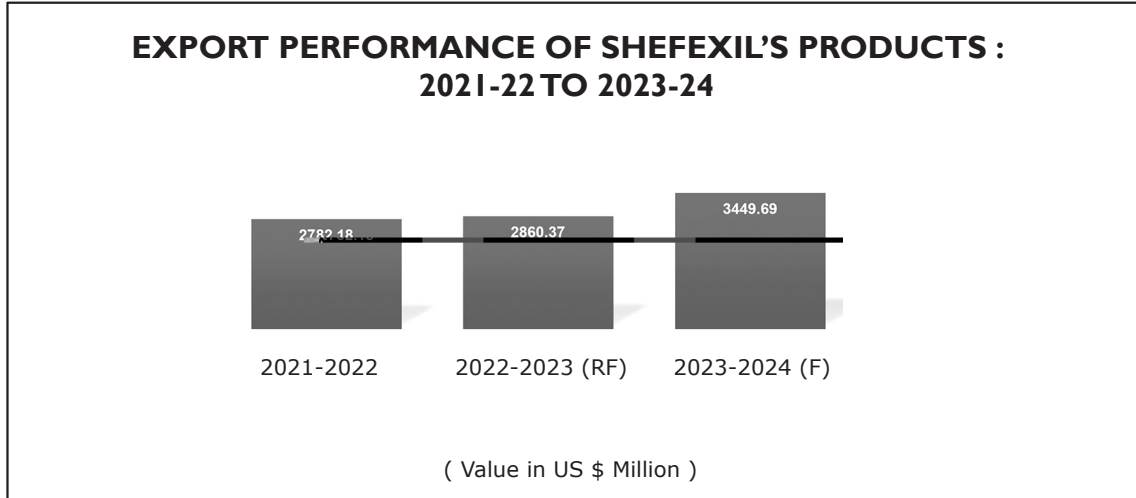
Exports from this sector may not be generating billions of dollars but the importance lies in generation of millions of jobs. According to a recent study done by Ministry of Environment & Forests, “Some 50 million tribal people depend on NTFPs for meeting their subsistence consumption and income needs”. 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

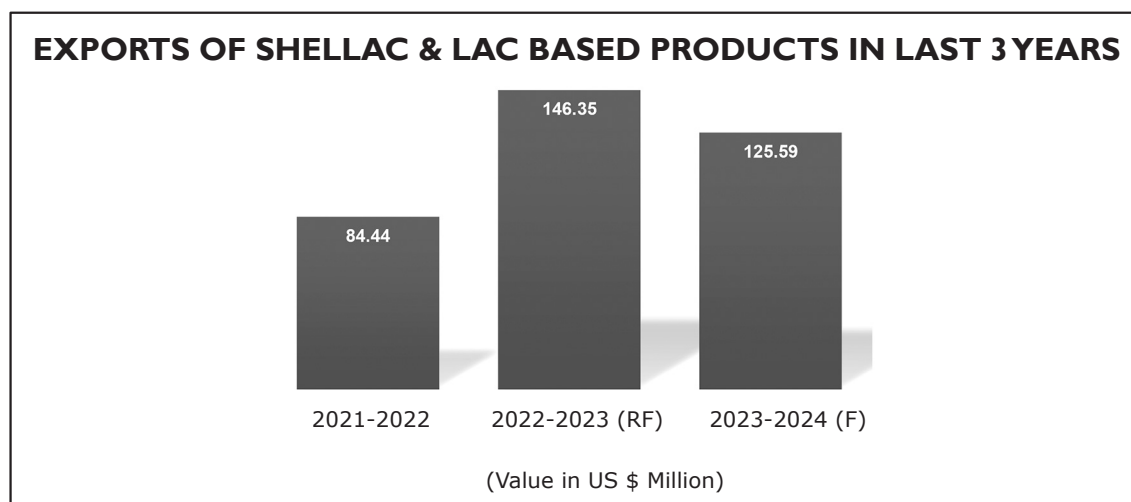
SHEFEXIL DATA ON TOP 20 EXPORT DESTINATIONS OVER THE LAST THREE YEARS

SHEFEXIL: ALL PANEL TOP 20 EXPORTING COUNTRY		April-MARCH 2022 (2021-22)		April-MARCH 2023 (2022-23)		April-MARCH 2024 (2023-24)	
SL.NO	Country	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn
1	U S A	169764.51	951.13	143550.96	890.27	173451.34	1011.52
2	GERMANY	51895.18	172.82	71636.86	209.67	66357.53	211.36
3	CHINA P RP	139310.59	211.28	126872.02	236.43	124709.35	182.88
4	U ARAB EMTS	52354.03	138.09	25244.46	72.29	62824.46	134.66
5	U K	27328.52	90.30	22800.91	78.43	36712.30	113.32
6	AUSTRALIA	22512.52	75.79	15937.44	58.18	36728.33	107.84
7	RUSSIA	42084.56	72.77	42892.92	92.44	43211.28	101.77
8	CANADA	21038.96	59.09	16389.62	47.69	33539.71	101.39
9	KOREA RP	22131.27	65.18	28738.98	90.91	27099.70	97.77
10	NETHERLAND	32879.56	70.87	45735.06	87.55	61200.12	95.33
11	ITALY	10713.07	50.28	15710.98	63.47	17949.35	79.44
12	JAPAN	16781.42	55.99	14827.51	54.23	19376.95	68.75
13	FRANCE	6794.67	50.85	7288.31	46.61	7009.87	67.68
14	NORWAY	55553.83	44.21	81618.77	68.05	96890.77	63.86
15	MALAYSIA	6688.22	21.37	7150.00	23.50	9882.23	57.70
16	INDONESIA	9382.20	22.59	9984.77	46.20	13010.51	47.33
17	BANGLADESH PR	34593.87	41.74	26986.31	40.17	24897.23	46.91
18	BRAZIL	5836.44	20.26	7979.84	28.41	11604.15	45.41
19	THAILAND	7308.18	20.94	8418.56	29.97	9754.43	44.23
20	SINGAPORE	5631.38	37.59	3116.02	26.25	6269.23	40.61
TOP 20 ALL PANEL EXPORT TOTAL		740582.95	2273.12	722880.26	2290.71	882478.81	2719.77
GRAND TOTAL		942751.11	2782.18	945726.85	2860.37	1145809.80	3449.69



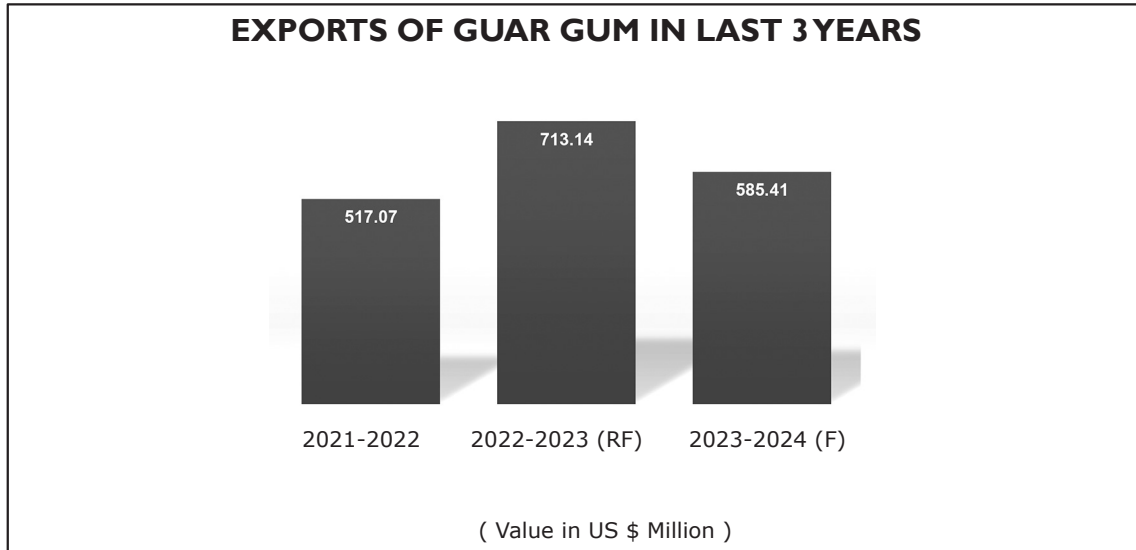
4. Export analysis of major product groups

❖ Shellac & Lac Based Product



❖ TOP 15 EXPORT DESTINATION SHELLAC & LAC BASED PRODUCTS

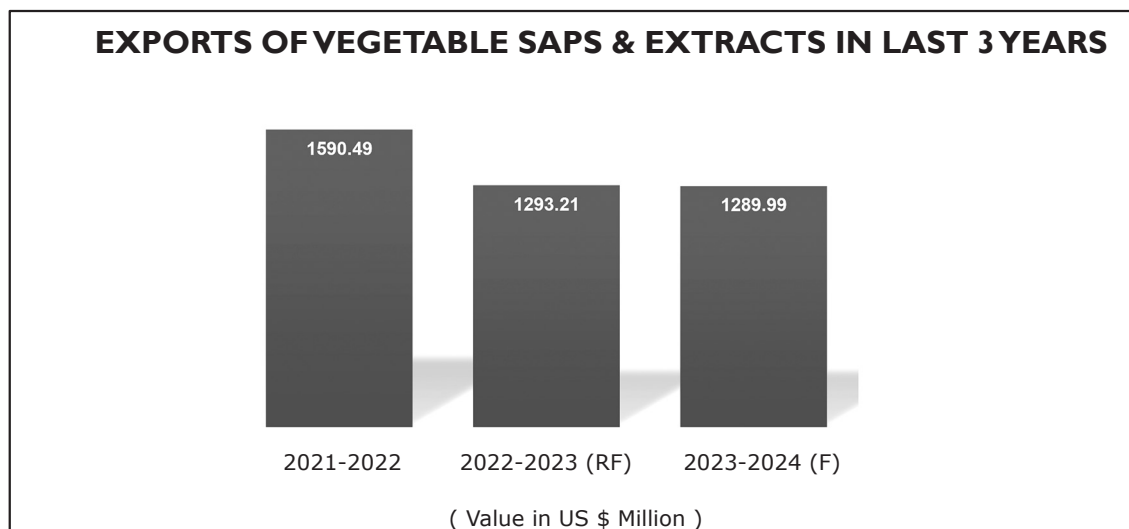
SHELLAC & LAC BASED PRODUCTS EXPORTING COUNTRY		April-MARCH 2022 (2021-22)		April-MARCH 2023 (2022-23)		April-MARCH 2024 (2023-24)	
SL.NO	Country	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn
1	U S A	2522.64	26.78	1718.17	26.46	1951.98	19.90
2	U ARAB EMTS	157.23	1.39	551.84	10.80	742.95	11.72
3	SAUDI ARAB	2.00	0.05	519.29	10.70	434.01	8.82
4	BANGLADESH PR	1746.23	12.17	1294.28	11.81	942.33	8.55
5	NIGERIA	2.75	0.04	776.20	8.90	657.33	8.27
6	GERMANY	850.90	9.00	544.57	8.22	504.77	5.92
7	INDONESIA	72.00	0.71	354.99	4.70	385.90	4.85
8	JORDAN	0.00	0.00	319.45	3.12	384.05	3.97
9	CHINA P RP	219.40	10.11	150.22	7.00	257.24	3.43
10	IRAQ	387.00	3.88	252.93	3.17	308.59	3.00
11	SRI LANKA DSR	30.02	0.30	152.85	1.89	242.80	2.55
12	MEXICO	27.40	1.64	132.11	3.74	115.15	2.39
13	SPAIN	122.05	1.44	284.35	2.74	348.59	2.26
14	SINGAPORE	0.50	0.00	132.66	1.85	142.85	2.22
15	U K	142.16	2.13	95.79	1.68	132.81	2.17
	TOP 15 COUNTRY EXPORT TOTAL	6282.28	69.63	7279.70	106.78	7551.32	90.01
	GRAND TOTAL	7659.95	84.44	11288.90	146.35	11588.96	125.59

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

PANEL : GUAR GUM		April-MARCH 2022 (2021-22)		April-MARCH 2023 (2022-23)		April-MARCH 2024 (2023-24)	
SL.NO	Country	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn
1	U S A	80377.03	130.91	81808.35	164.17	57993.01	113.35
2	GERMANY	30560.60	45.09	52159.43	74.11	47405.80	72.73
3	RUSSIA	39694.26	60.99	39465.05	73.13	38125.76	69.17
4	NORWAY	55340.47	43.49	81527.78	67.74	96640.24	62.79
5	CHINA P RP	56465.21	72.58	63068.74	104.00	27764.93	43.52
6	NETHERLAND	22233.68	21.27	37433.58	40.95	47161.06	38.41
7	CANADA	7652.19	12.72	10489.03	20.37	10081.86	19.01
8	AUSTRALIA	8385.56	12.45	9472.16	13.87	15957.43	18.87
9	U K	13593.06	15.04	13025.54	15.97	17250.33	16.82
10	ITALY	3740.63	5.22	8977.83	13.25	8808.54	11.17
11	BRAZIL	3565.90	6.11	4239.06	8.62	5011.03	9.69
12	JAPAN	2290.67	7.09	2615.66	7.19	2897.24	7.24
13	U ARAB EMTS	2181.75	3.37	2598.91	4.72	4404.02	6.82
14	INDONESIA	4469.17	6.91	3150.05	6.29	3507.28	6.06
15	DENMARK	3144.04	3.76	5120.00	5.23	7392.42	6.05
	TOP 15 COUNTRY EXPORT TOTAL	333694.22	447.00	415151.17	619.61	390400.95	501.70
	GRAND TOTAL	378522.59	517.07	469589.78	713.14	450047.02	585.41

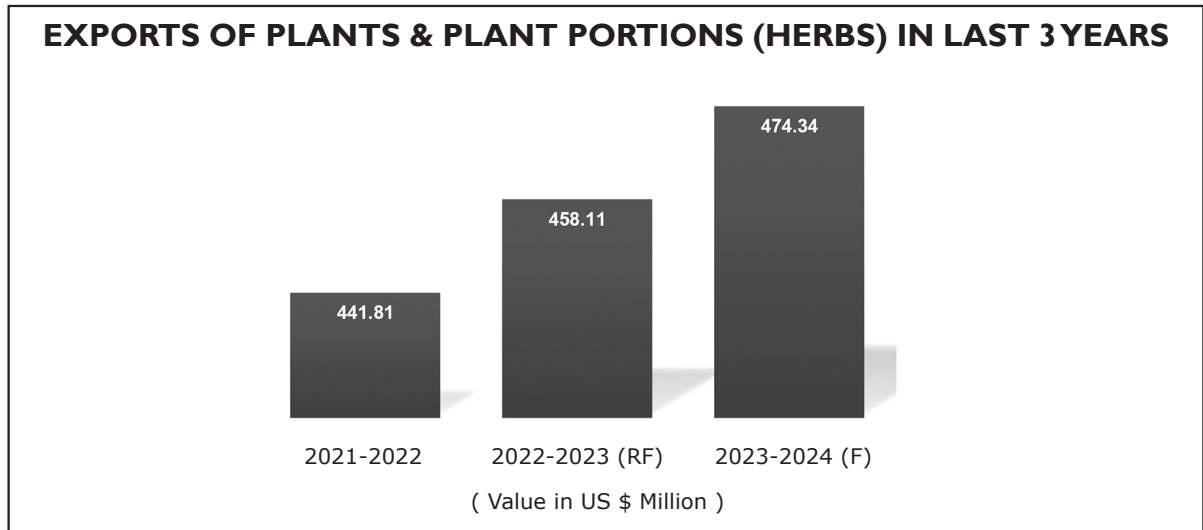


❖ Vegetable Saps & Extracts



❖ TOP 15 EXPORT DESTINATION VEGETABLE SAPS & EXTRACTS

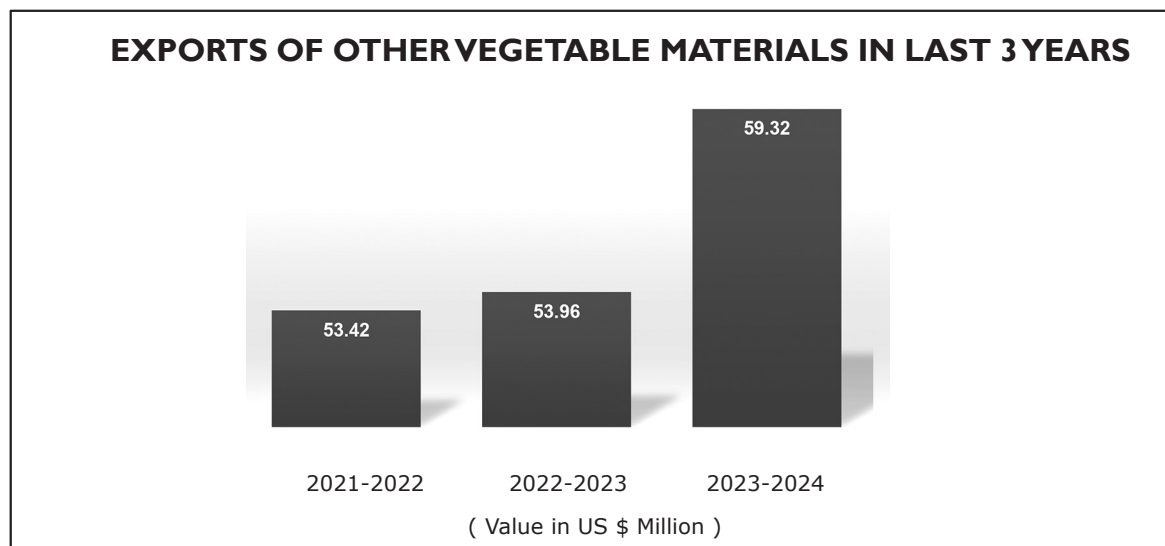
VEGETABLE SAPS & EXTRACTS (Added new HSN)		April-MARCH 2022 (2021-22)		April-MARCH 2023 (2022-23)		April-MARCH 2024 (2023-24)	
SL.NO	Country	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn
1	U S A	48319.79	615.21	16389.84	493.03	20034.18	485.2
2	CHINA P RP	33985.41	85.64	39247.35	92.01	30507.93	85.58
3	KOREA RP	4431.43	43.43	6825.32	65.32	5675.02	69.57
4	GERMANY	6425.12	56.37	5029.28	61.21	4160.9	56.21
5	JAPAN	3370.05	36.02	3452.84	33.19	2828.91	40.05
6	MALAYSIA	2605.02	11.37	1819.84	9.85	2363.43	37.53
7	U K	9691.21	56.74	3864	32.27	4375.84	29.53
8	U ARAB EMTS	41935.71	118.13	6315.19	27.4	10280.76	27.18
9	ITALY	1651.32	20.81	1795.43	22.78	2120.02	26.29
10	NETHERLAND	3835.83	34.19	2197.27	27.74	2807.12	26.25
11	INDONESIA	3488.75	11.91	4995.14	30.86	2662.68	24.96
12	FRANCE	2206.29	35.06	1385.36	26.79	1219.77	24.92
13	AUSTRALIA	11116.15	50.79	1085.56	25.91	1127.95	23.74
14	BRAZIL	1324.31	10.55	2281.83	14.78	3466.58	21.2
15	SINGAPORE	4279.41	33.86	1596.36	19.21	1845.95	20.76
	TOP 15 COUNTRY EXPORT TOTAL	132415.97	619.40	83534.19	504.59	77514.57	531.13
	GRAND TOTAL	282500.18	1590.49	174145.6	1293.21	171169.5	1289.99

❖ **Plant & Plant Portion (Herbs)**❖ **TOP 15 EXPORT DESTINATION PLANT & PLANT PORTION (HERBS)**

PLANT & PLANT PORTIONS (HERBS)		April-MARCH 2022 (2021-22)		April-MARCH 2023 (2022-23)		April-MARCH 2024 (2023-24)	
SL.NO	Country	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn
1	U S A	29792.97	150.23	27984.24	151.98	23739.03	155.62
2	GERMANY	13118.61	59.90	12617.38	62.35	10892.83	64.02
3	ITALY	3642.70	19.28	2955.81	20.80	3404.82	30.23
4	CHINA P RP	14826.53	27.15	15899.18	27.81	11685.74	22.72
5	U K	2044.45	11.89	2343.86	15.53	1682.31	13.96
6	BANGLADESH PR	12453.03	13.78	12431.15	12.00	8921.60	12.14
7	KOREA RP	1734.09	10.53	1448.21	10.32	1307.41	10.11
8	AUSTRALIA	1401.19	8.03	1126.76	7.36	1106.31	10.00
9	CANADA	1286.21	7.07	1309.14	6.47	2272.32	9.17
10	NETHERLAND	3912.41	9.06	3888.85	11.64	4618.80	8.67
11	U ARAB EMTS	5026.72	9.57	5508.21	10.94	3849.08	8.41
12	JAPAN	1810.85	6.92	1305.34	6.13	1805.68	7.92
13	THAILAND	2377.72	7.44	1219.65	4.17	1544.05	7.52
14	SPAIN	851.91	3.97	1127.62	5.13	971.24	6.98
15	BELGIUM	1575.95	5.21	1256.30	4.77	1054.67	6.91
	TOP 15 COUNTRY EXPORT TOTAL	95855.34	350.03	92421.70	357.40	78855.89	374.38
	GRAND TOTAL	133264.4	441.81	129856.8	458.11	113288	474.34

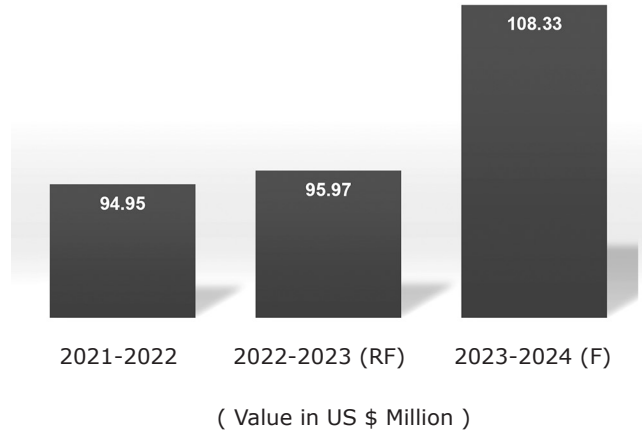


❖ Other Vegetable Materials



❖ TOP 15 EXPORT DESTINATION OTHER VEGETABLE MATERIALS

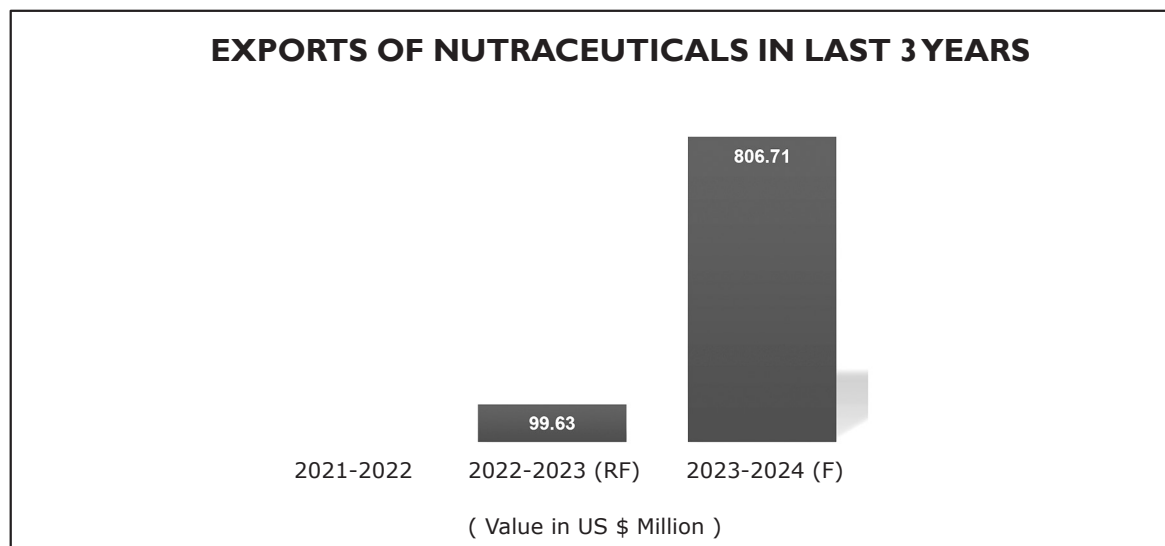
OTHER VEGETABLE MATERIALS		April-MARCH 2022 (2021-22)		April-MARCH 2023 (2022-23)		April-MARCH 2024 (2023-24)	
SL.NO	Country	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn
1	CHINA P RP	32717.44	15.22	7575.81	4.88	46271.76	14.17
2	U S A	801.07	2.34	2277.14	7.17	2304.01	9.02
3	JAPAN	8381.92	4.48	6110.00	4.39	9310.59	5.58
4	BHUTAN	10477.91	3.40	19485.94	4.51	10949.75	3.36
5	SRI LANKA DSR	2784.40	9.26	1523.17	4.99	1234.02	3.34
6	U K	830.93	1.56	1141.86	2.88	1215.81	3.29
7	GERMANY	506.04	1.21	727.92	2.32	1003.77	2.96
8	U ARAB EMTS	1371.10	1.51	1803.99	1.92	3308.69	2.75
9	SAUDI ARAB	590.58	0.35	3433.28	1.79	4135.74	1.86
10	SPAIN	713.51	0.93	986.95	1.69	698.23	1.38
11	AUSTRALIA	174.43	0.44	981.25	1.22	780.59	1.11
12	NETHERLAND	178.84	0.25	244.38	0.50	487.58	0.83
13	KUWAIT	719.24	0.19	1309.93	0.39	2697.92	0.74
14	ISRAEL	43.11	0.10	414.54	0.92	187.37	0.72
15	BELGIUM	55.57	0.14	282.96	0.83	223.73	0.65
	TOP 15 COUNTRY EXPORT TOTAL	60346.09	41.38	48299.12	40.40	84809.56	51.76
	GRAND TOTAL	72704.47	53.42	62063.31	53.96	91745.1	59.32

❖ **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 2022 (2021-22)		April-MARCH 2023 (2022-23)		April-MARCH 2024 (2023-24)	
SL.NO	Country	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn
1	U S A	7951.01	25.66	6755.89	22.33	10442.55	27.13
2	CHINA P RP	1096.60	0.58	921.89	0.70	7929.27	6.87
3	U ARAB EMTS	1681.52	4.12	1962.64	5.11	1981.58	5.46
4	KOREA RP	14123.78	7.36	16277.67	6.67	14041.85	5.38
5	NETHERLAND	2701.75	5.71	1475.35	4.10	1897.04	5.23
6	ITALY	1374.87	3.48	1614.27	4.40	2066.43	5.10
7	MALAYSIA	1234.39	2.85	1860.73	3.98	2095.02	4.16
8	U K	1026.71	2.94	707.23	2.80	1028.41	3.78
9	AUSTRALIA	1415.08	3.78	1084.75	3.10	1322.03	3.75
10	MEXICO	1171.08	2.97	2488.75	6.38	1141.87	3.42
11	SINGAPORE	636.96	2.09	653.00	2.52	647.16	2.70
12	CANADA	694.01	2.50	456.36	1.90	546.56	2.48
13	TAIWAN	1436.68	2.27	2152.26	3.89	1498.57	2.46
14	INDONESIA	2.29	0.06	8.37	0.06	2382.30	2.08
15	FRANCE	504.03	1.66	393.68	1.38	725.10	2.03
	TOP 15 COUNTRY EXPORT TOTAL	37050.76	68.03	38812.84	69.32	49745.74	82.03
	GRAND TOTAL	68099.57	94.95	65337.48	95.97	68819.84	108.33



❖ Nutraceuticals



❖ TOP 15 EXPORT DESTINATION NUTRACEUTICALS

NUTRACEUTICALS		April-MARCH 2022 (2021-22)		April-MARCH 2023 (2022-23)		April-MARCH 2024 (2023-24)	
SL.NO	Country	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn	Qty. MT	Value US\$ Mn
1	U S A			6617.32	25.13	56986.58	201.30
2	U ARAB EMTS			6503.67	11.40	38257.38	72.32
3	CANADA			2523.76	7.18	18522.42	53.34
4	AUSTRALIA			2159.15	6.11	16421.29	50.09
5	U K			1622.63	7.30	11026.79	43.77
6	FRANCE			31.81	0.17	851.18	26.91
7	NEPAL			1066.04	3.50	3113.59	15.60
8	NETHERLAND			290.39	0.95	4048.87	14.82
9	SINGAPORE			420.40	1.58	3346.61	13.93
10	AFGHANISTAN			387.32	2.37	3748.45	13.53
11	PHILIPPINES			499.62	1.24	4769.58	12.14
12	RUSSIA			50.68	1.33	450.44	11.79
13	SAUDI ARAB			1362.27	1.77	7950.88	11.40
14	THAILAND			93.69	0.78	1244.23	11.31
15	IRAQ			1694.91	2.00	9417.37	10.84
	TOP 15 COUNTRY EXPORT TOTAL	0.00	0.00	25323.64	72.80	180155.66	563.09
	GRAND TOTAL	0.00	0.00	33444.99	99.63	239151.40	806.71



5.1 Activities undertaken

Promotional Awareness Seminars / Exhibition organized by the Council :

Events Abroad :

- Vitafoods Europe 2023, 9th - 11th May, 2023, Geneva, Switzerland.
- SupplySide West, 2023, 25th - 26th October, 2023. Las Vegas, USA
- Food Ingredients Europe 2023, 28th - 30th Nov., 2023, Frankfurt, Germany

Events in India :

- SHEFEXIL participated in the Stakeholders Meeting of the Review Committee with EPCs and FIEO on 18th October, 2023 at New Delhi.
- SHEFEXIL participated in the First Meeting of the Committee constituted for devising a way forward for smooth facilitation of Exports of Food Supplements containing Botanical Extracts from India on 31st October, 2023 at New Delhi.
- SHEFEXIL participated in the VC meeting on Second Meeting of the Committee constituted for devising a way forward for smooth facilitation of Exports of Botanical Extracts on 7th Nov., 2023.
- SHEFEXIL participated in the VC meeting on 'Export target review' held on 21st November, 2023.
- SHEFEXIL organized a RoDTEP Meeting on 18th Dec., 2023 & meeting of the Sub-Committee of MAI.
- SHEFEXIL facilitated visit of the members of the RoDTEP Committee to the member units of Council of the Botanical / Extracts Panel.
- SHEFEXIL participated in the Meeting of the Sub-Committee of MAI to consider proposals for assistance for export promotion activities during FY- 2024-25 and FY- 2025-26 on 27th December, 2023 at New Delhi.
- SHEFEXIL facilitated / organized the RoDTEP Committee field visit to Bengaluru from 17-19th January, 2024.
- SHEFEXIL participated in the FTA Monitoring Committee Meeting on 24th Jan., 2024 at New Delhi.
- SHEFEXIL, jointly with Bharat Chamber of Commerce, Kolkata organized a Symposium on "Unravelling India's new FTP for India's growth" on 27th January, 2024.
- Vide Public Notice No. 55/2015-20 dated 2nd February, Nutraceutical products have been included in the jurisdiction of SHEFEXIL in Appendix 2T of FTP 2015-2020.
- SHEFEXIL participated in the follow up meeting to the

4th EU-India Technical Working Group on Plant Health held virtually on 12th Feb., 2024.

- SHEFEXIL acted as a Strategic Partner with M/s. Informa Markets India Pvt. Ltd. in 'Vita Food India 2024', Mumbai held during 13th-15th Feb., 2024 to promote Nutraceuticals.
- SHEFEXIL participated in 'Horti Food Festival 2024' during 17th-19th Feb., 2024 at Kolkata with Department of Food Processing Industries & Horticulture, Govt. of West Bengal to promote usage of Indian Betel Leaf.
- SHEFEXIL participated as a 'Gold Partner' in '9th Nutraceuticals Summit and Awards' with ASSOCHAM on 29th Feb. 2024, New Delhi.
- SHEFEXIL participated & supported the annual Conference of Health Foods and Dietary Supplements Association (HADSA), at Mumbai held on 1st March, 2024 to interact with the Stock Holder with the Nutraceuticals Panels.

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 2024.

- 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 1024. 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 Supplement 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 :

- Availability of trade related data and information.
- International production and price trends and preferences.
- 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 1024 as on 31st March, 2024. The Council functions under the overall control and guidance of its Committee of



Administration. 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 special meetings with State/Central Govt., COA meetings and Interactive meetings with the Director General of Foreign Trade, Govt. of India were held during FY 2023-24. 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 Council's 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 2023-24, 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.

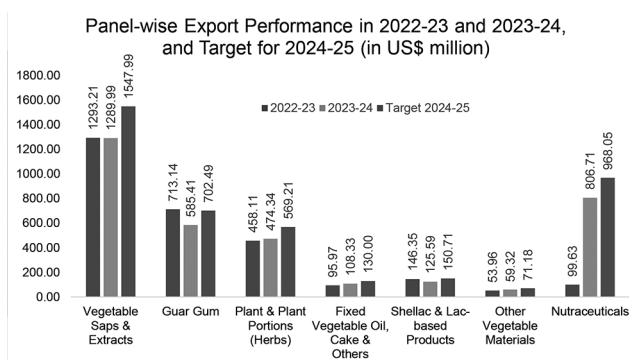
11. EXPORT OPERATIONAL CONCERNS AND ASSISTANCE

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 2022-24 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. SHRI AJIT SINGH PANEL : NUTRACEUTICALS CHAIRMAN, ACG (FORMERLY ASSOCIATED CAPSULES GROUP) DALAMAL HOUSE, 10TH FLR., NARIMAN POINT MUMBAI - 400 021.
13. DR. VAIBHAV KULKARNI PANEL : NUTRACEUTICALS HON. SECRETARY HADSA (HEALTH FOODS & DIETARY SUPPLEMENTS ASSOCIATIONS) 1001, DALMAL HOUSE, NARIMAN POINT, MUMBAI - 400 021.	14. SHRI HITESH PATEL PANEL : NUTRACEUTICALS MANAGING DIRECTOR M/S. K. PATEL PHYTO EXTRACTIONS PVT LTD. 507 EUREKA TOWER MINDSPACE, OFF LINK ROAD, MALAD WEST, MUMBAI – 400064.
GOVT. NOMINEES	
15. MS. AISHVARYA SINGH, IAS JT. SECRETARY TO THE GOVT. OF INDIA DEPTT. OF COMMERCE, EP(CAP) DIV. MINISTRY OF COMMERCE & INDUSTRY VANIJYA BHAWAN, ROOM NO: 421 NEW DELHI - 110 011	16. 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	
17. SHRI VARUN SINGH JT. DGFT DEPTT. OF COMMERCE, EP(CAP) DIV. MINISTRY OF COMMERCE & INDUSTRY UDYOG BHAWAN, ROOM NO. 223 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.



SHEFEXIL

