

# EXECUTIVE SUMMARY



## Market for Textiles & Clothing (MTC)

The Annual Report of “Market for Textiles and Clothing: National Household Survey 2012-13”, has been prepared on the basis of bi-monthly textile purchase data for the calendar year 2011 & 2012 respectively. The textile purchase data is recorded from 13280 sample households located in 357 centers (105 urban & 252 rural centers) across the country. The MTC survey provides a reliable and scientific basis for estimating and analyzing the consumption in the Household sector as well as for estimating the market size for important textile products. This survey also provides estimates for total textile trade at household level. The major findings of the market for textiles & clothing study are presented here.

### AGGREGATE AND PER CAPITA DEMAND FOR TEXTILES

The per capita consumption of textiles for year 2012 in terms of quantity is 25.93 metres as against 24.70 metres in the year 2011 thereby recorded a positive growth of 4.98%. An average persons’ consumption of textiles has increased by 1.23 metres in 2012 as compared to 2011. The detailed demand of all textiles in India is given in Table 1.

While in terms of value, the per capita consumption is estimated at Rs. 2862.87 in 2012 as against Rs. 2473.64 in 2011. The aggregate consumption of all textiles has been 31636 million metres in 2012 as compared to 29881 million metres in 2011 showing a positive growth rate of 5.87% over

TABLE 1: PER CAPITA & AGGREGATE DEMAND FOR TEXTILES

Year	Per Capita demand		Aggregate Consumption	
	Q (metres)	V (Rupees)	Q (Billion metres)	V (Billion Rupees)
2011	24.70	2473.64	29.88	2993.58
2012	25.93	2862.87	31.63	3493.28

Q: Quantity ; V: Value

previous year. In value terms, the aggregate consumption of all textiles has been Rs.3493287 million in 2012 while in 2011 it recorded Rs. 2993585 million.

### DOMESTIC DEMAND IN A NUTSHELL

Aggregate consumption of overall textile in 2012 was 31,636 mn metres as against 29,881 mn metres in 2011 with a growth rate of 5.87%.

Urban area contributed 37.50% of total demand with the consumption of 11,863 mn metres in 2012 as against 11,343 mn metres in 2011.

Rural area contributed 62.50% of total demand with the consumption of 19,773 mn metres in 2012 as against 18,538 mn metres in 2011.

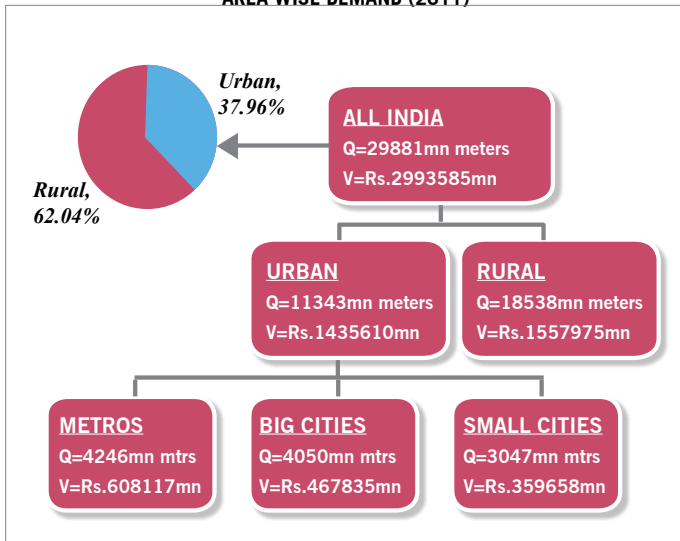
Per capita consumption of overall textile in 2012 was 25.93 metres as against 24.70 metres in 2011.

The demand of manmade fibre was 18034 mn metres during 2012 is highest among all other fibres, as compared to 17012 mn metres in 2011

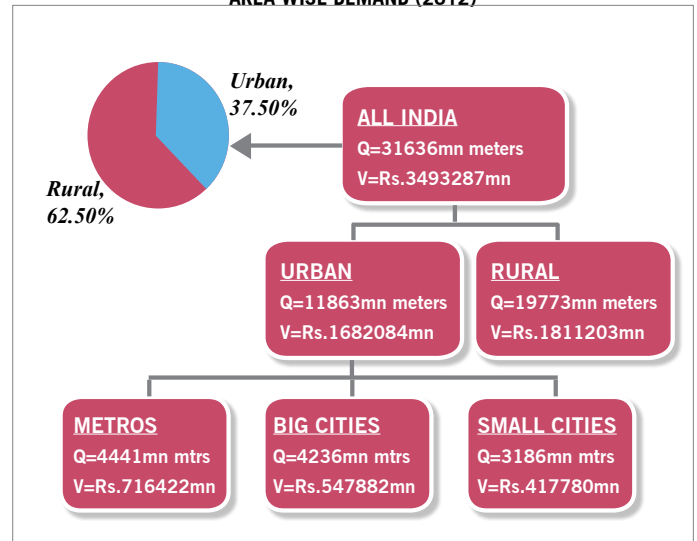
In the different varieties, garments in piece length, readymade garments and piece length have contributed 40.06%, 23.38% and 17.56% respectively for both the years.

The demand of cotton fibre was 13,289 mn metres in 2012 as against 12,589 mn metres in 2011 with a growth of 5.56%.

**AREA WISE DEMAND (2011)**



**AREA WISE DEMAND (2012)**



**AREA WISE DEMAND OF TEXTILES**

The data for 2012 shows that 62.50% of total consumption is from rural area and that of 37.50% is from urban. In urban area the aggregate consumption of textiles was 11,863 million metres in 2012 as against 11,343 million metres in 2011. While in the rural area, the aggregate consumption of textiles in 2012 was 19,773 million metres as against 18,538 million metres in 2011. Similarly the per capita consumption of textiles in urban area was 31.20 metres in 2012 which was 30.08 metres in 2011. In rural area, the per capita

consumption was 23.54 metres in 2012 and 22.25 metres in 2011.

Within urban area, the per capita consumption of textiles in Metros, Big cities, Small cities was 35.04 metres, 33.42 metres, 25.14 metres respectively. And the aggregate consumption in Metros, Big cities, Small cities was 4441 million metres, 4236 million metres & 3186 million metres respectively.

The demand of woollen fibre was 92 mn metres in 2012 as against 80 mn metres in 2011. It is lowest among all other fibres.

Per capita consumption of all India female was 30.42 metres in 2012 and was 28.98 metres in 2011.

Per capita consumption of male was 21.44 metres in 2012, as against 20.42 metres in 2011.

In the total demand of textile, mill made & power loom sector has contributed 84% with the demand of 26,687 mn metres in 2012.

Central and south regions are the highest contributors of total textile purchased with share of 22 & 23% respectively. The East, West and North regions have a share of 18%, 21% and 16% respectively.

The demand of pure silk was 221 mn metres in 2012 as against 200 mn metres in 2011.

Similarly other sectors, Knitted/ Hosiery and Handloom have contributed 12% and 4% respectively.

## FIBRE WISE DEMAND OF TEXTILE IN 2012

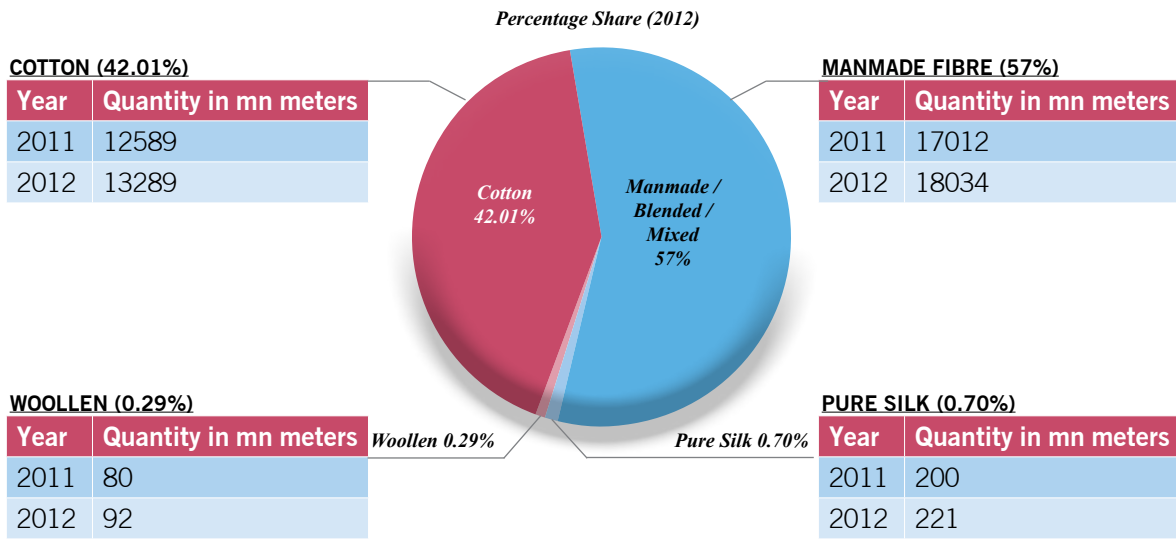
Fibre is the basic raw material used for manufacturing different textile items. The broad process in making of fabric involves conversion of raw fibre into yarn and then yarn is converted to fabric.

Broadly fibres are classified as following:

- Cotton
- Pure Silk
- Woollen
- Man-Made & Blended / Mixed

The survey reveals that out of the total aggregate consumption of 31,636 million metres (per capita – 25.93 metres) of textiles in year 2012, Man-made and Blended/Mixed textiles together

have the largest share of 57.00 percent followed by Cotton textiles 42.01 percent, Pure silk textiles 0.70 percent and Woollen textiles 0.29 percent. The aggregate consumption of cotton fibre was 13,289 million metres in 2012 showing a positive growth over the previous year 2011. The aggregate consumption of manmade fibre was 18,034 million metres in 2012 as against 17,012 million metres in 2011. Similarly the consumption of pure silk and woollen fibre was 221 million metres and 92 million metres respectively in 2012 as compared to 200 million metres and 80 million metres respectively in 2011.



## GENDER WISE DEMAND OF TEXTILES

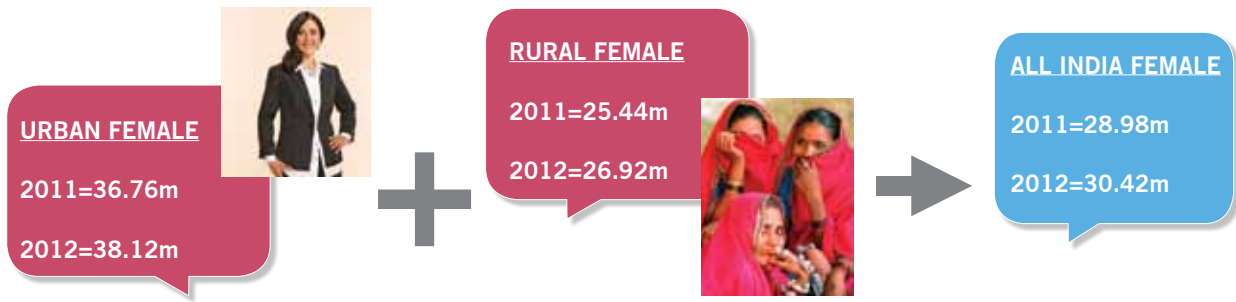
The purchases of an average Indian Male have increased by 1.02 metres in 2012. The estimated per capita purchases is 21.44 metres in 2012 as against 20.42 metres in 2011, hence a positive growth of 4.99 percent has been recorded during 2012.

An average Indian Male is reported to have spent Rs.318.50 more for purchases of textiles in 2012 compared to 2011.

The per capita purchases for all textiles have increased to Rs 2344.59 in 2012 as against Rs. 2026.09 in 2011, a positive growth of 15.72 percent.

The average purchases of textiles by urban Indian Male have increased by 0.88 metres in 2012. The per capita consumption in 2012 is 24.28 metres as compared to 23.40





metres in 2011 and hence registering a growth of 3.76 percent.

The purchases of textiles of an average Female have increased by 1.44 metre. The per capita purchases are 30.42 metres in 2012 as compared to 28.98 metres in 2011 with a growth of 3.47 percent. An average urban Female's purchase of textiles

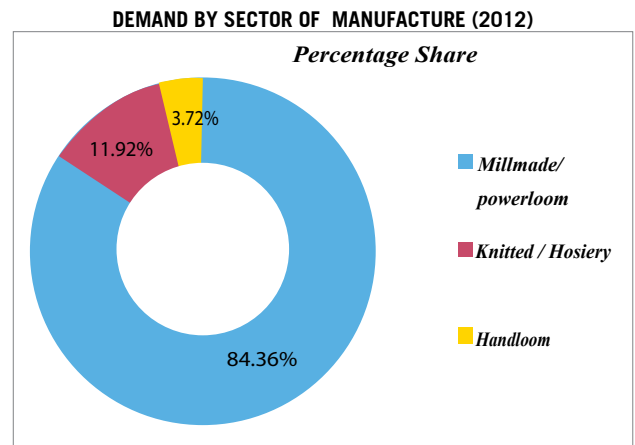
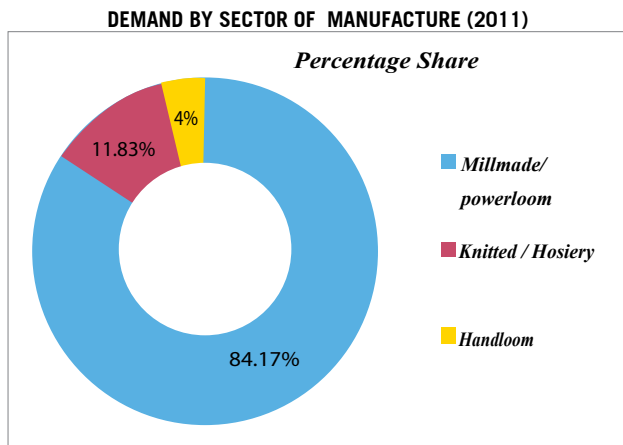
has increased by 1.36 metres in 2012 as compared to 2011. The per capita purchase of Female in urban area during 2012 is 38.12 metres as against 36.76 metres in 2011.

An average rural Female's purchase of textiles has increased by 1.48 metres in 2012. The per capita consumption increased to 26.92 metres in 2012 from 25.44 metres in 2011.

### DEMAND OF TEXTILES BY SECTOR OF MANUFACTURE

The results of the survey indicated that in 2011 in the total textile consumption, Mill made & Power loom sector alone has contributed 84.17%, while Knitted/Hosiery and Handloom sectors have contributed 11.83% & 4% of the total consumption respectively.

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### AGGREGATE CONSUMPTION FROM THE SECTORS

The consumption of textiles originated from mill made/power loom sectors was 26,687 million metres in 2012 and 25150 million metres in 2011. Likewise from Knitted / Hosiery sector, the consumption was 3772 million metres in 2012 and 3536 million metres in 2011. The consumption from handloom

sector was 1177 million metres in 2012 as compared to 1195 million metres in 2011. At all India level, the aggregate consumption of cotton textiles manufactured in mill made / power loom sector is 8497 million metres in 2012 as against 8124 million metres in 2011. The aggregate consumption



**MILLMADE / POWERLOOM**  
 2011=25150 mn mtrs  
 2012=26687 mn mtrs



**KNITTED / HOSIERY**  
 2011=3536 mn mtrs  
 2012=3772 mn mtrs



**HANDLOOM**  
 2011=1195 mn mtrs  
 2012=1177 mn mtrs

of pure silk textiles manufactured in this sector is 27 million metres in 2012 as compared to 26 million metres in 2011. The aggregate consumption of Woollen textiles manufactured in this sector is 32 million metres in both 2011 & 2012.

The aggregate consumption of Manmade/Blended textiles manufactured in this sector is 17552 million metres in 2012 in comparison to 16555 million metres in 2011.

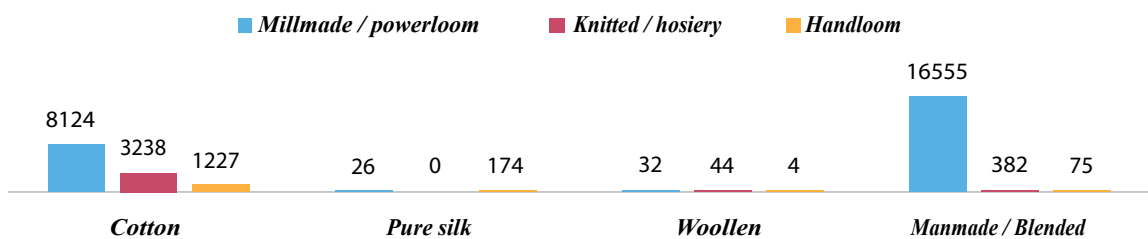
The aggregate consumption of cotton textiles manufactured in Knitted / Hosiery sector is 3506 million metres in 2012 and 3238 million metres in 2011. The aggregate consumption of pure silk textiles manufactured in this sector is Nil. The aggregate consumption of Woollen textiles manufactured in this sector is 56 million metres in 2012 as compared to 44 million metres in 2011. The aggregate consumption of

Manmade/Blended textiles Manufactured in this sector are 406 million metres in 2012 as compared to 382 million metres in 2011.

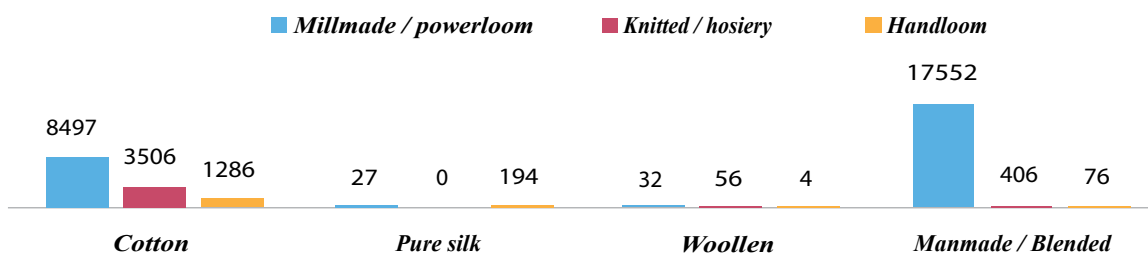
The aggregate consumption of cotton textiles manufactured in Handloom sector is 1286 million metres in 2012 in comparison to 1227 million metres in 2011. The aggregate consumption of pure silk textiles manufactured in this sector is 194 million metres in 2012 as compared to 174 million metres in 2011. The aggregate consumption of Woollen textiles manufactured in this sector is 4 million metres in both the years 2012 & 2011. The aggregate consumption of Manmade/Blended textiles manufactured in this sector is 76 million metres in 2012 as compared to 75 million metres in 2011.

**CONSUMPTION OF FIBRE - SECTORWISE**

*Consumption of fibres - sector wise(2011)*



*Consumption of fibres - sector wise(2012)*



**DEMAND OF TEXTILES BY VARIETY**

Textile items are mainly categorized as woven and knitted textiles. Out of 29881 million metres purchased by households in 2011 & 31636 million metres purchased by households in 2012, about 88.09 percent are woven textiles and 11.91 percent are knitted textiles.

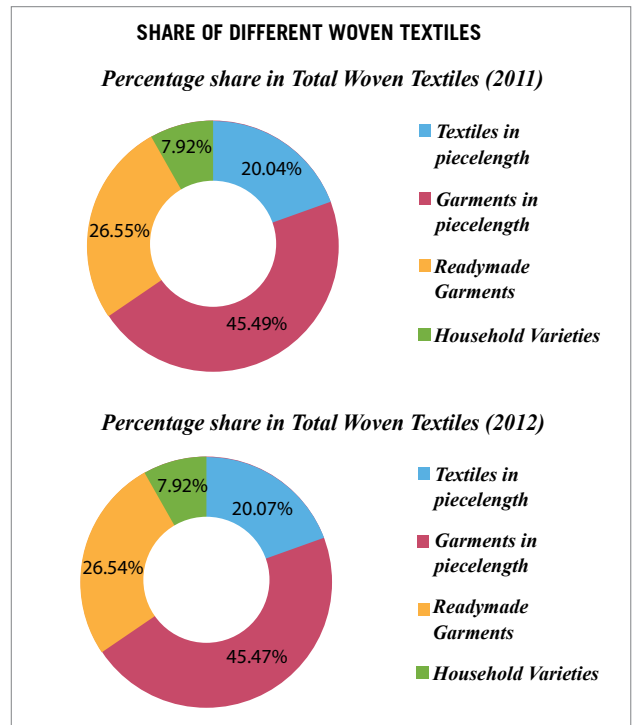
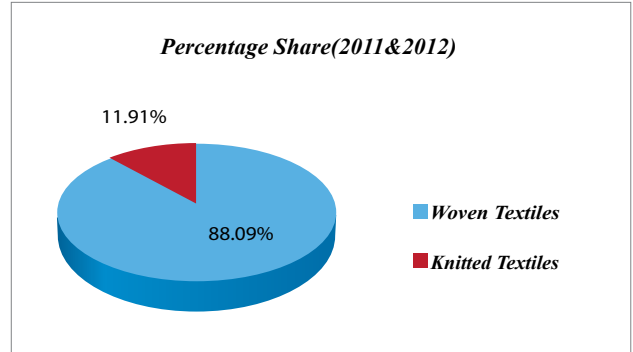
Further the woven varieties have been broadly classified and analyzed under the following four heads, namely:

- Woven Textiles in Piece Length
- Woven Garments in Piece Length
- Woven Readymade Garments
- Woven Household Varieties

For the year 2011, out of woven textiles, garments in piece length accounts for major share of 45.49 percent followed by woven readymade garments having 26.55 percent, textiles in piece length has a share of 20.04 percent and woven household varieties is reported to have share of 7.92 percent.

For the year 2012, out of woven textiles, garments in piece length accounts for major share of 45.47 percent followed by woven readymade garments having 26.54 percent, textiles in piece length has a share of 20.07 percent and woven household varieties is reported to have share of 7.92%.

**SHARE OF VARIETIES**



**PURCHASE OF ALL WOVEN AND KNITTED VARIETIES**

**WOVEN TEXTILES IN PIECE LENGTH**

At all India level, the aggregate purchase of “woven textiles in piece length” is 5594 million metres, which is 20 percent of the total all India household textiles purchases during 2012 as against 5276 million metres in 2011.

**WOVEN READYMADE GARMENTS**

The aggregate purchases of woven readymade garments were 6989 million metres in 2011 while during 2012 at the all India level were 7397 million metres with a percentage share of 26 in the total purchases.

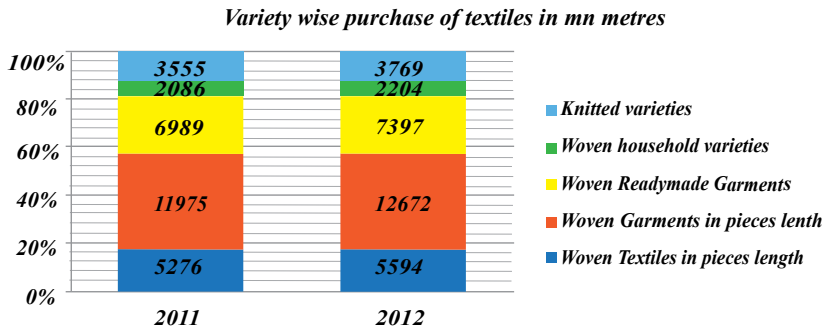
**GARMENTS IN PIECE LENGTH**

At the all India level, the aggregate purchases of garments in piece length during 2012 are 12672 million metres, which is 46 percent of the total purchase. While in 2011 the purchases were 11975 million metres.

**WOVEN HOUSEHOLD VARIETIES**

The aggregate purchase of woven household varieties during 2012 at the all India level is 2204 million metres. This accounts for 7 percent of total textile purchases. And in 2011 the purchases of home textiles were 2086 million metres.

## VARIETY WISE PURCHASE OF TEXTILES



Garments in piece length have contributed almost 40.06% in both years followed by readymade garments, textiles in piece length, woven household varieties and knitted varieties with the share of approximately 23.38%, 17.68%, 6.97% and 11.91% respectively.

### KNITTED VARIETIES

The aggregate purchases of knitted varieties during 2012 at the all India level are 3769 million metres, which is 11.91 percent of the total purchases. The aggregate purchases of knitted varieties in urban area is 1148 million metres in 2012 and 1097 million metres in 2011. In rural areas, the aggregate purchases of knitted varieties are 2621 million metres in 2012 as compared to 2458 million metres in 2011.

Now the domestic market of textiles is discussed through

(i) Personal Clothing and (ii) Home Textiles

#### **Personal clothing items:**

Items purchased for the use of individuals are classified under this category. Outer garments such as saree, dhotis, trousers, shirts, T-shirts etc. and body support garments

such as vests, underwear, petticoats, brassieres etc. are the commonly used items in this category. The market size for the items in this category is 26,239 million metres during 2010. In the year 2011 and 2012, the market size of these items are 27,795 million metres and 29,432 million metres respectively.

(a) **Western Wear:** Men's and women's clothing which derives its unique style from the clothes worn by western country people

(b) **Ethnic Wear:** Traditional garments worn by the Indians. These garments are also used in the functions like wedding, thread ceremony and festivals.

(c) **Intimate Wear:** Undergarments worn next to the skin and under the outer garments.

*Table No. 2*

### DEMAND OF SOME MAJOR VARIETIES FROM PERSONAL CLOTHING & HOME TEXTILES:

Sr. No	Product	Trends in purchase in million pieces						
		2006	2007	2008	2009	2010	2011	2012
<b>WESTERN WEAR</b>								
1.	Shirt	399	419	443	461	477	514	546
2.	Trouser	292	314	323	351	367	397	421
3.	Half-pant	130	141	190	192	200	202	206
4.	Frock	164	174	187	181	188	200	215
5.	Skirt/Midi	25	25	35	36	33	34	35
6.	Jeans(Male)	163	173	177	182	219	237	249
7.	Jeans(Female)	8	9	8	11	11	13	13
8.	T-shirt(Male)	165	179	181	199	230	249	265
9.	T-shirt(female)	11	13	16	16	12	12	12
10.	Sweater	185	190	186	198	218	217	235

*contd. on Pg 11*

Sr. No	Product	Trends in purchase in million pieces						
		2006	2007	2008	2009	2010	2011	2012
<b>ETHNIC WEAR</b>								
11	Saree	1612	1720	1596	1729	1798	1918	2029
12.	Dhoti(male)	128	117	117	101	96	101	109
13.	Lungi	217	231	227	230	244	245	263
14.	Odhani/Dupatta	66	76	72	88	98	103	109
15.	Blouse/Choli	169	159	180	186	167	174	176
16.	Kurta/Zabba	25	29	37	37	41	41	42
17.	Kameez	10	12	14	15	15	17	17
18.	Pajjama	16	20	18	18	13	14	14
19.	Salwar	24	28	31	31	26	26	26
20.	Kurta- pajjama set	24	26	30	31	18	21	21
21.	Churidar/salwar kameez set	319	339	356	369	380	406	433
<b>INTIMATE WEAR</b>								
22.	Vest	664	721	739	788	826	874	919
23.	Brief	429	468	491	525	581	610	648
24.	Panties	144	155	156	158	176	187	193
25.	Petticoat	357	377	421	425	466	500	528
26.	Brassier	76	82	94	102	112	118	118
<b>HOME TEXTILE ITEMS</b>								
27.	Chaddar	122	127	146	137	153	159	166
28.	Bed sheet	148	156	173	173	195	207	218
29.	Towel	387	400	453	436	465	495	524
30.	Terry Towel	13	15	14	14	17	18	18
31.	Blanket	5	4	3	3	1	1	1
32.	Rajai	34	36	40	39	38	39	39
33.	Mosquito net	9	12	13	14	16	13	15
34.	Pillow cover/Cushion cover	72	76	72	86	86	94	96
35.	Sataranji/jamakkalam	12	13	12	13	12	15	15