



## EU Market Watch (Apr-Mar'2017)

### 1.0 Introduction:

The EU is the largest T&C market of the world followed by US and imported \$ 250.15 billion during 2016. EU T&C imports from the rest of the world were \$ 247.58 billion during the same period in Apr-Mar' 2016-17 as compared to \$ 242.47 billion during the same period in 2015-16, registering a positive growth of 2.11%

Tab-1:EU import of T&C

Period	Import (\$ Bn)
2016	250.15
Apr-Mar' 2015-16	242.47
Apr-Mar' 2016-17	247.58
Growth (%)	(+) 2.11

Being one of the largest markets, the major T&C exporting countries have always been trying to enhance their market share by increasing competitiveness leading to intense competition among the major players. India being one of the major exporters to EU and competing with countries like China, Germany and Bangladesh etc there is need to study the month-wise trend and composition of the export both at aggregate and product level.

The **Textiles Committee Market/Country Report for April-March'2017** has tried to analyse India's position in EU market vis-à-vis competitors so as to provide feedback to the policy makers for appropriate policy decision and textile trade & industry for desirable business strategy. The highlights are as follows:

### 2.0 EU as an export destination (Apr-Mar' 2016-17):

#### 2.1 Extra-EU:

- EU T&C imports from the extra EU were \$ 128.24 billion in Apr-Mar' 2016-17.



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- EU import from extra EU of T&C was tilted in favour of clothing products i.e. Chapter-61 (Knitted garment), Chapter-62 (Woven garment) and Chapter-63 (Other made-ups).
- The clothing import from extra EU was to the tune of \$ 106.43 billion (82.99%) during Apr-Mar' 2016-17 whereas imports in textiles items were worth \$ 21.81 billion (17.01%).
- China was leading in textiles and clothing export in EU market with \$ 43.67 billion contributing 34.06 percent during Apr-Mar' 2016-17.
- Bangladesh was distant second with \$ 17.90 billion (13.95%) followed by Turkey with \$ 16.46 billion (12.83%), India \$ 9.00 billion (7.02%) and Pakistan \$ 5.80 billion (4.52%) during Apr-Mar' 2016-17.

Table-2: Top exporters to EU during Apr-Mar' 2016-17 (\$ Bn)

Exporter	Apr-Mar' 2015-16	Apr-Mar' 2016-17	% Change
China	45.71	43.67	↓ -4.46
Bangladesh	16.76	17.90	↑ 6.81
Turkey	16.75	16.46	↓ -1.72
India	8.98	9.00	↑ 0.29
Pakistan	5.45	5.80	↑ 6.43
RoW	34.44	35.41	↑ 2.80
Extra-EU	128.08	128.24	↑ 0.12

Source: Eurostat

### 2.2 Intra-EU:

- EU T&C imports from the intra EU were \$ 119.34 billion in Apr-Mar' 2016-17.
- EU import from intra EU of T&C was tilted in favour of clothing products i.e. Chapter-61 (Knitted garment), Chapter-62 (Woven garment) and Chapter-63 (Other made-ups).
- The clothing import from intra EU was to the tune of \$ 82.19 billion (68.87%) during Apr-Mar' 2016-17 whereas imports in textiles items were worth \$ 37.15 billion (31.13%).



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- Germany was leading in textiles and clothing export in intra EU market with \$ 23.89 billion contributing 20.02 percent during Apr-Mar' 2016-17.
- Italy was distant second with \$ 16.54 billion (13.86%) followed by Netherlands with \$ 10.63 billion (8.91%), France \$ 9.01 billion (7.55%) and Spain \$ 8.46 billion (7.09%) during Apr-Mar' 2016-17.

Table-3: Top exporters to EU during Apr-Mar' 2016-17 (\$ Bn)

Exporter	Apr-Mar' 2015-16	Apr-Mar' 2016-17	% Change
Germany	22.55	23.89	↑ 5.94
Italy	16.22	16.54	↑ 2.02
Netherlands	9.94	10.63	↑ 0.97
France	8.98	9.01	↑ 0.34
Spain	7.83	8.46	↑ 7.95
RoEU	48.87	50.82	↑ 3.98
Intra-EU	114.38	119.34	↑ 4.34

Source: Eurostat

### **3.0 India as an Exporter of T&C to EU (Apr-Mar' 2016-17):**

- India's T&C export to EU during Apr-Mar' 2016-17 was \$ 9.00 billion as compared to \$ 8.98 billion during the same period of the previous year, which accounts about 26 percent of India's total T&C export to the world.
- India's aggregate export of textiles to EU (Chapter 50 to 60) was \$ 1.82 billion during Apr-Mar' 2016-17 which is 15 percent of India's total textiles exports to the world.
- India's aggregate export of clothing to EU (Chapter 61 to 63) was \$ 7.18 billion during Apr-Mar' 2016-17 which is 33 percent of India's total clothing exports to the world.
- Top 21 Products (whose share is more than 1%) contributed 50.56 percent to the export basket in EU market during Apr-Mar' 2016-17.
- The share of these top 21 products was 50.43 percent in the same period of 2015-16.



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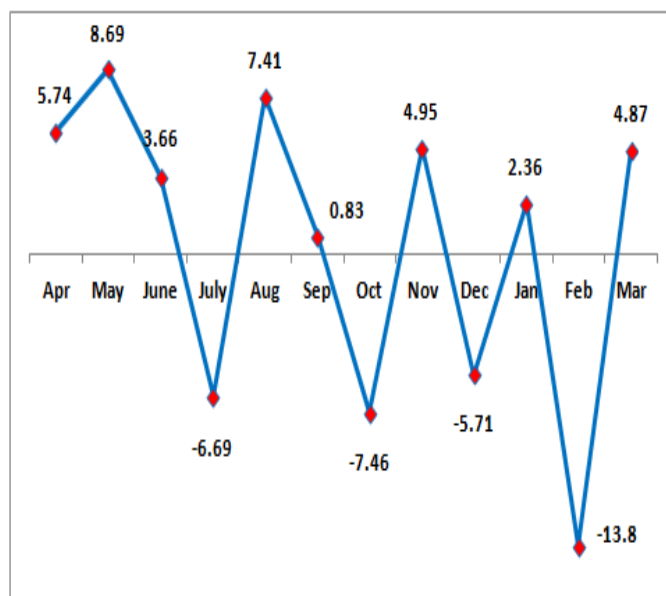
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Table-4  
India's T&C Exports to EU (Mn. \$)

Month	April-March		
	2015-16	2016-17	% Change
April	845.11	893.59	5.74
May	717.29	779.62	8.69
June	755.94	783.58	3.66
July	793.74	740.63	-6.69
August	723.49	777.1	7.41
September	696.36	702.15	0.83
October	675.77	625.36	-7.46
November	591.73	621	4.95
December	618.07	582.77	-5.71
January	753.6	771.38	2.36
February	901.59	777.2	-13.8
March	905.44	949.55	4.87
Apr-Mar	8978.1	9003.9	0.29

Source: Eurostat

Fig-1  
Change in the exports



## Comments

- The exports growth was highest in May 2016 as compared to the same period in 2015.



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### **3.1 India's Top Performing Products in EU market (Apr-Mar' 2016-17)**

- Major 10 products have experienced positive growth during April–March' 2016-17 as compared to the same period during 2015-16

Table-5: Top performing products of India (Mn.\$)

Products	Descriptions	Apr-Mar' 2015-16	Apr-Mar' 2016-17	% change
61091000	T-shirts, singlets and other vests of cotton, knitted	774.2	783.2	1.15%
61112090	Babies' garments accessories, of cotton, knitted	304.9	352.3	15.54%
63053219	Flexible intermediate bulk containers, of polyethylene, woven	222.4	231.7	4.19%
61046200	Women's or girls trousers, bib and brace overalls of cotton, knitted	204.9	213.7	4.29%
63026000	Toilet linen and kitchen linen, of terry towelling of cotton	165.1	173.0	4.75%
62044400	Women's or girls dresses of artificial fibres, not knitted	127.1	139.0	9.37%
61099020	T-shirts, singlets of artificial fibres, knitted	118.7	127.0	6.97%
61072100	Men's or boys nightshirts of cotton, knitted or crocheted	104.6	106.1	1.37%
61102091	Men's or boys' jerseys, pullovers, of cotton, knitted	92.9	95.1	2.35%
62034235	Men's or boys' trousers of cotton, woven	90.1	94.6	4.97%
Total		2205.2	2315.7	5.01%

Source: Eurostat



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### **3.2 India's Top Products having negative growth (Apr-Mar' 2016-17)**

- Major 11 products have experienced negative growth during April –March' 2016-17 as compared to the same period during 2015-16

Table-6: Top Products having negative growth (Mn \$)

Products	Descriptions	Apr-Mar' 2015-16	Apr-Mar' 2016-17	% change
62064000	Women's or girls blouses, shirts of man-made fibres, not knitted	444.7	431.3	-3.02%
62052000	Men's or boys shirts of cotton, not knitted	325.5	311.1	-4.41%
62063000	Women's or girls blouses, shirts of cotton, not knitted	292.2	291.8	-0.13%
61083100	Women's or girls nightdresses of cotton, knitted	175.1	172.2	-1.69%
62044200	Women's or girls dresses of cotton, not knitted	157.9	144.3	-8.56%
61051000	Men's or boys shirts of cotton, knitted or crocheted	150.4	143.2	-4.78%
62044300	Women's or girls dresses of synthetic fibres , not knitted	171.4	142.4	-16.95%
61102099	Women's or girls' jerseys, pullovers, of cotton, knitted	107.7	104.2	-3.24%
62114390	Women's or girls 'other garments of manmade fibres, not knitted	106.4	88.2	-17.11%
61044200	Women's or girls' dresses, of cotton, knitted	88.7	86.9	-2.05%
61071100	Men's or boys underpants and briefs of cotton, knitted	95.2	86.2	-9.44%
Total		2115.2	2001.8	-5.36%

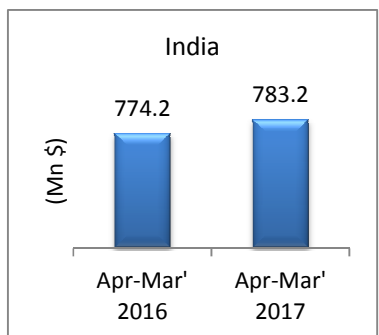
Source: Eurostat



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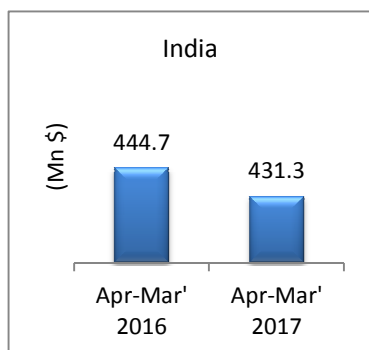
### 4.0 India's Product wise Performance vis-à-vis Competitors (Apr-Mar' 2016-17) over previous year

#### 1. T-shirts, singlets and other vests of cotton, knitted or crocheted (61091000)



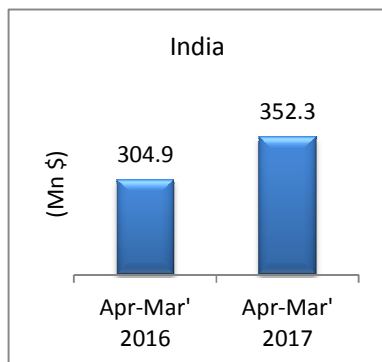
Rank	Country	%Change
1	Bangladesh	2.98%
2	Turkey	1.03%
3	India	1.15%
4	Netherlands	8.48%
5	Belgium	-1.90%
6	China	-12.07%
7	Italy	12.20%
8	Portugal	3.24%
9	France	7.10%
10	UK	10.93%

#### 2. Women's or girls blouses, shirts of man-made fibres, not knitted (62064000)



Rank	Country	%Change
1	China	-2.59%
2	India	-3.02%
3	Spain	-1.84%
4	Turkey	-11.00%
5	Morocco	2.05%
6	Romania	-9.09%
7	Bangladesh	17.82%
8	Poland	10.66%
9	UK	18.16%
10	Denmark	-5.26%

#### 3. Babies' garments & accessories, of cotton, knitted (61112090)

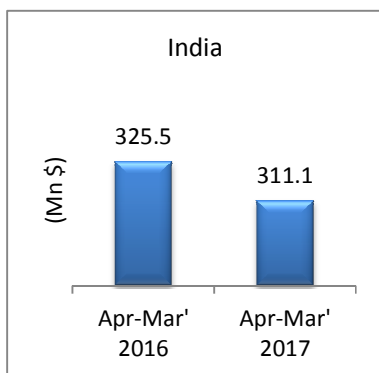


Rank	Country	%Change
1	China	-9.60%
2	Bangladesh	9.04%
3	India	15.54%
4	France	2.68%
5	Poland	39.13%
6	Turkey	9.43%
7	Sri Lanka	1.05%
8	Netherlands	21.12%
9	Spain	11.73%
10	Cambodia	40.36%



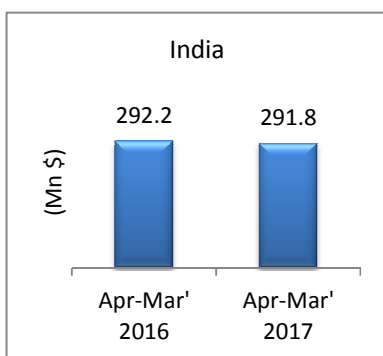
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### 4. Men's or boys shirts of cotton, not knitted (62052000)



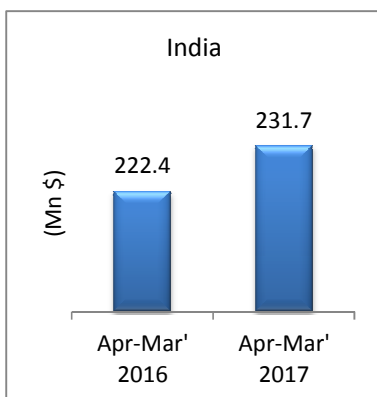
Rank	Country	%Change
1	Bangladesh	-2.35%
2	China	-17.99%
3	Turkey	-7.67%
4	India	-4.41%
5	Italy	-6.01%
6	Netherlands	-6.12%
7	Spain	0.33%
8	Vietnam	2.52%
9	UK	-7.01%
10	Belgium	-7.79%

### 5. Women's or girls blouses, shirts of cotton, not knitted (62063000)



Rank	Country	%Change
1	India	-0.13%
2	Bangladesh	-0.69%
3	China	-5.71%
4	Spain	39.04%
5	Turkey	6.03%
6	Italy	3.21%
7	Morocco	51.56%
8	Poland	39.46%
9	Netherlands	7.81%
10	UK	9.45%

### 6. Flexible intermediate bulk containers, of polyethylene, woven (63053219)



Rank	Country	%Change
1	India	4.19%
2	Turkey	1.38%
3	Belgium	20.49%
4	Bangladesh	-2.68%
5	Netherlands	11.09%
6	Romania	0.03%
7	Czech Rep.	11.85%
8	China	-13.55%
9	Bulgaria	-0.24%
10	Serbia	-0.03%

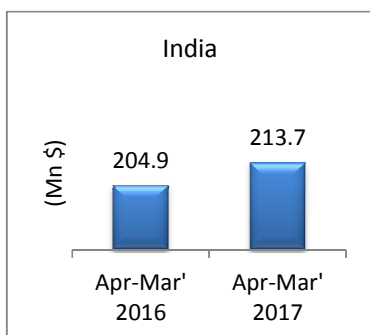




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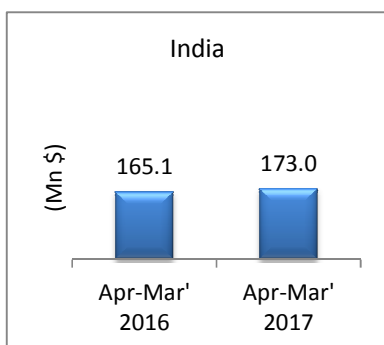
(April-March'2017)

## 7. Women's or girls trousers bib and brace overalls of cotton, knitted (61046200)



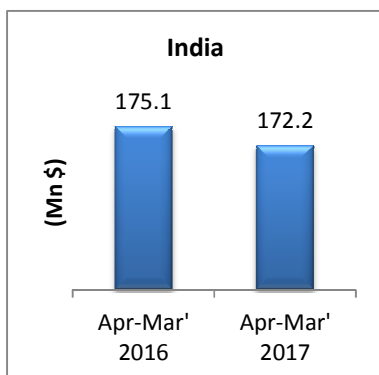
Rank	Country	%Change
1	Bangladesh	9.66%
2	China	-14.85%
3	India	4.29%
4	Cambodia	15.78%
5	Belgium	5.90%
6	Turkey	-22.47%
7	France	9.97%
8	Netherlands	13.94%
9	Poland	43.92%
10	Spain	14.06%

## 8. Toilet linen and kitchen linen, of terry towelling of cotton (63026000)



Rank	Country	%Change
1	Turkey	8.79%
2	Pakistan	8.65%
3	India	4.75%
4	Portugal	-1.97%
5	China	-2.96%
6	Netherlands	19.27%
7	Bangladesh	24.91%
8	Belgium	-13.59%
9	Egypt	-1.01%
10	Austria	-0.77%

## 9. Women's or girls nightdresses of cotton, knitted (61083100)

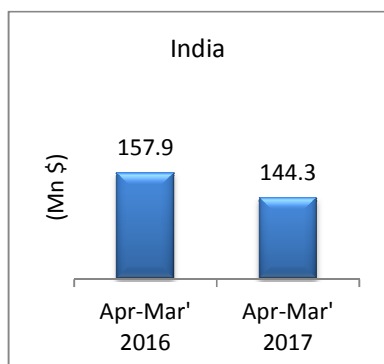


Rank	Country	%Change
1	India	-1.69%
2	Bangladesh	2.94%
3	China	-23.75%
4	Turkey	-10.44%
5	Belgium	-18.23%
6	Netherlands	-3.53%
7	Poland	20.79%
8	Italy	2.10%
9	France	-8.02%
10	Cambodia	3.37%



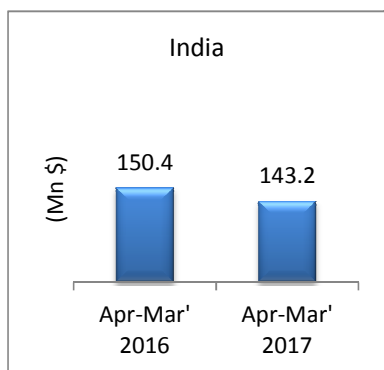
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### 10. Women's or girls dresses of cotton, not knitted (62044200)



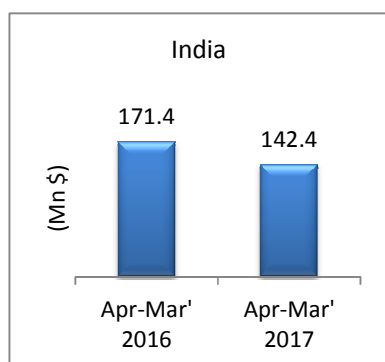
Rank	Country	%Change
1	China	-6.28%
2	India	-8.56%
3	Italy	1.13%
4	Spain	17.72%
5	Turkey	4.35%
6	UK	6.88%
7	Morocco	13.98%
8	France	-8.19%
9	Bangladesh	44.48%
10	Poland	25.68%

### 11. Men's or boys shirts of cotton, knitted or crocheted (61051000)



Rank	Country	%Change
1	Bangladesh	0.34%
2	China	-15.04%
3	Turkey	-0.19%
4	Italy	-7.49%
5	India	-4.78%
6	Netherlands	-0.14%
7	France	3.35%
8	Vietnam	12.91%
9	Belgium	0.77%
10	Spain	7.10%

### 12. Women's or girls dresses of synthetic fibres, not knitted (62044300)



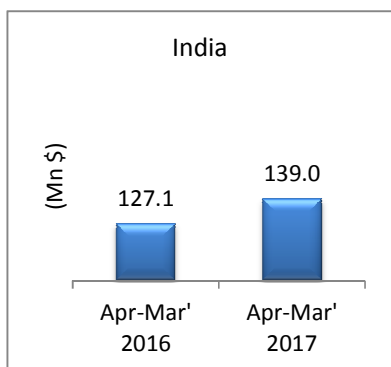
Rank	Country	%Change
1	China	-2.13%
2	UK	41.07%
3	Spain	-6.70%
4	India	-16.95%
5	Italy	18.81%
6	Turkey	-0.36%
7	Poland	9.41%
8	Romania	-9.30%
9	Morocco	4.52%
10	France	-12.37%



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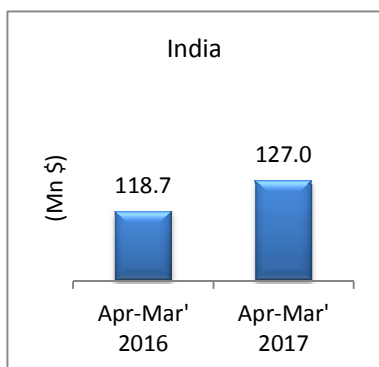
(April-March'2017)

## 13. Women's or girls dresses of artificial fibres, not knitted (62044400)



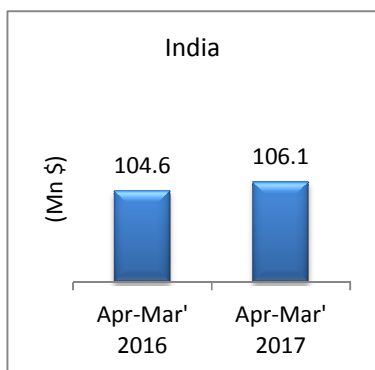
Rank	Country	%Change
1	China	-3.09%
2	India	9.37%
3	Spain	5.08%
4	Morocco	2.96%
5	Italy	1.38%
6	Turkey	20.82%
7	France	-2.32%
8	UK	26.62%
9	Poland	165.41%
10	Romania	-12.09%

## 14. T-shirts, singlets of artificial fibres, knitted (61099020)



Rank	Country	%Change
1	Turkey	-7.47%
2	China	-7.64%
3	Belgium	5.33%
4	Bangladesh	9.55%
5	Spain	2.47%
6	Cambodia	12.42%
7	Netherlands	15.33%
8	France	2.33%
9	Portugal	-11.24%
11	India	6.97%

## 15. Men's or boys nightshirts of cotton, knitted or crocheted (61072100)



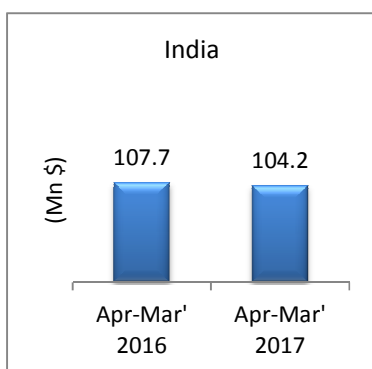
Rank	Country	%Change
1	India	1.37%
2	Bangladesh	-0.49%
3	China	-12.98%
4	Belgium	-28.75%
5	Netherlands	-6.10%
6	Turkey	-7.33%
7	France	14.92%
8	Poland	10.20%
9	Italy	4.27%
10	Cambodia	38.08%



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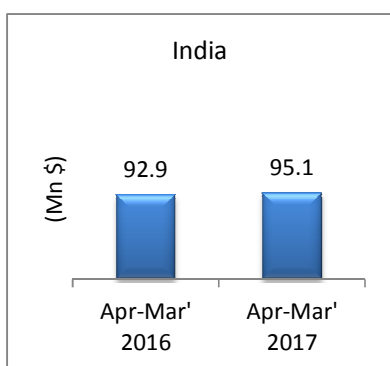
(April-March'2017)

## 16. Women's or girls' jerseys, pullovers, of cotton, knitted (61102099)



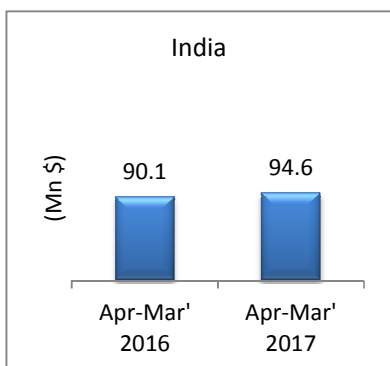
Rank	Country	%Change
1	China	-11.84%
2	Bangladesh	3.59%
3	Turkey	0.65%
4	Cambodia	6.37%
5	Netherlands	16.37%
6	Poland	56.03%
7	Italy	-1.87%
8	Belgium	8.43%
9	France	-3.20%
12	India	-3.24%

## 17. Men's or boys' jerseys, pullovers, of cotton, knitted (61102091)



Rank	Country	%Change
1	Bangladesh	5.74%
2	China	-5.96%
3	Netherlands	10.58%
4	Turkey	5.98%
5	Italy	1.74%
6	Pakistan	16.31%
7	Denmark	-4.42%
8	UK	15.64%
9	Spain	9.17%
11	India	2.35%

## 18. Men's or boys' trousers of cotton, woven (62034235)

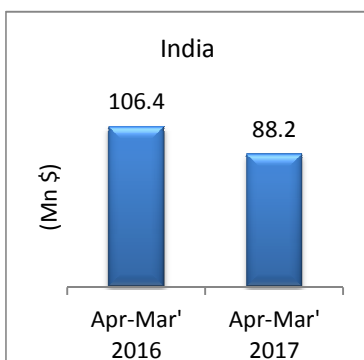


Rank	Country	%Change
1	Bangladesh	5.77%
2	China	-20.24%
3	Turkey	-11.00%
4	Spain	8.62%
5	Italy	5.93%
6	Tunisia	-13.53%
7	Pakistan	3.62%
8	Netherlands	11.66%
9	Poland	79.41%
12	India	4.97%



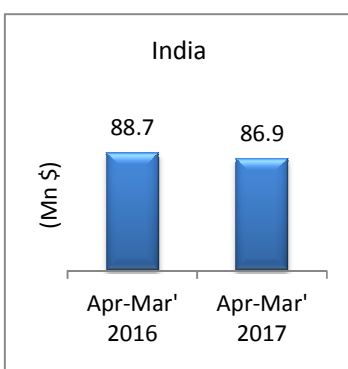
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### 19. Women's or girls' other garments of manmade, not knitted or crocheted (62114390)



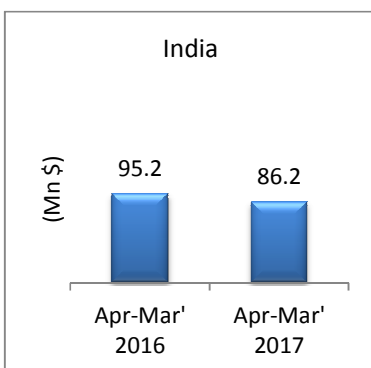
Rank	Country	%Change
1	China	-14.31%
2	India	-17.11%
3	Spain	-2.37%
4	Morocco	17.37%
5	Poland	-2.77%
6	Turkey	18.45%
7	UK	52.54%
8	Netherlands	-4.09%
9	France	-4.86%
10	Italy	20.09%

### 20. Women's or girls' dresses of cotton, knitted or crocheted, excl. petticoats(61044200)



Rank	Country	%Change
1	Bangladesh	21.88%
2	China	-17.12%
3	Turkey	-6.02%
4	India	-2.05%
5	Italy	-1.79%
6	Spain	3.55%
7	Poland	23.79%
8	Portugal	17.00%
9	Netherlands	36.23%
10	UK	-1.23%

### 21. Men's or boys underpants and briefs of cotton, knitted (61071100)



Rank	Country	%Change
1	China	-5.27%
2	Bangladesh	12.66%
3	Netherlands	9.54%
4	India	-9.44%
5	Sri Lanka	-10.34%
6	Italy	-4.97%
7	Cambodia	1.30%
8	France	3.36%
9	Austria	4.45%
10	Vietnam	80.99%