

TC MARKET/ COUNTRY REPORT

Apr-Jan, 2016-17

US Market Watch



Textiles Committee
Government of India



US Market Watch (Apr-Jan, 2016-17)

1.0 Introduction:

The US is the second largest T&C market of the world after EU and imported \$ 113.59 billion during 2016. The US T&C imports from the rest of the world were \$96.21 billion during the same period in 2016-17 as compared to \$100.97 billion during the period Apr-Jan, 2015-16 registering a negative growth of 4.72%.

Tab-1:US import of T&C

Period	Import (\$ Bn)
2016	113.59
April-Jan, 2015-16	100.97
April-Jan, 2016-17	96.21
Growth (%)	(-) 4.72

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 exporter to US and competing with countries like China, Vietnam, Mexico, 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-January, 2016-17** has tried to analyse India's position in US 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 US as an export destination (Apr-Jan, 2016-17):

- US T&C imports from the rest of the world were \$ 96.21 billion in Apr-Jan, 2016-17.
- US import 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 the world was to the tune of \$ 83.68 billion (86.98%) during Apr-Jan, 2016-17 whereas imports in textiles items were worth \$ 12.53 billion (13.02%).



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- China was leading in textiles and clothing export in US market with \$ 35.89 billion contributing 37.30 percent during Apr-Jan, 2016-17.
- Vietnam was distant second with \$ 9.85 billion (10.24%) followed by India with \$ 6.48 billion (6.40%), Bangladesh \$ 4.52 billion (4.70%) and Mexico \$ 4.37 billion (4.54%) during Apr-Jan, 2016-17.

Table-2: Top exporters to US during Apr-Dec'16 (\$ Bn)

Exporter	Apr-Jan, 2015-16	Apr-Jan, 2016-17	%Change
China	38.35	35.89	↓ -6.42
Viet Nam	9.65	9.85	↑ 2.11
India	6.56	6.48	↓ -1.25
Bangladesh	4.74	4.52	↓ -4.57
Mexico	4.47	4.37	↓ -2.23
RoW	37.20	35.09	↓ -5.66
World	100.97	96.21	↓ -4.72

Source: ITC

3.0 India as an Exporter of T&C to US (Apr-Jan, 2016-17):

- India's T&C export to US during Apr-Jan, 2016-17 was \$ 6.48 billion as compared to \$ 6.56 billion during the same period of the previous year, which accounts about 21 percent of India's total T&C export to the world.
- The export has declined by 1.25% over the same period of previous year.
- India's aggregate export of textiles to US (Chapter 50 to 60) was \$ 1.41 billion during Apr-Jan, 2016-17 which is 13 percent of India's total textiles exports to the world.
- India's aggregate export of clothing to US (Chapter 61 to 63) was \$ 5.07 billion during Apr-Jan, 2016-17 which is 28 percent of India's total clothing exports to the world.
- Top 20 Products (whose share is more than 1%) contributed 46.78 percent to the export basket in US market during Apr-Jan, 2016-17.



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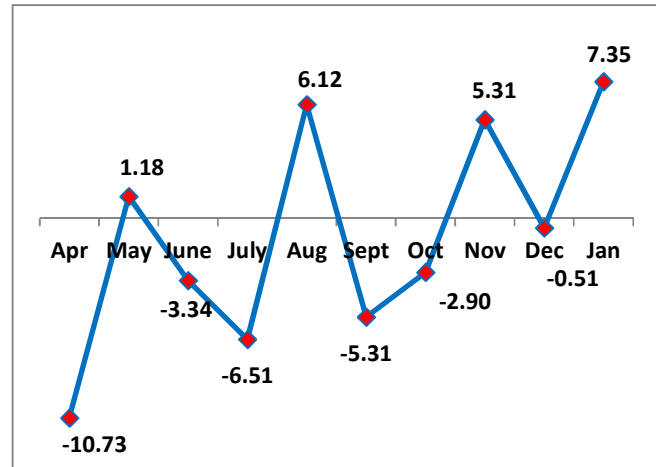
- The share of these top 20 products was 46.38 percent in the same period of 2015-16.

Table 3:
India's T&C Exports to US (Mn. \$)

Month	April-January		
	2015-16	2016-17	%Change
April	768.82	686.33	-10.73
May	659.23	666.98	1.18
June	662.53	640.41	-3.34
July	708.16	662.07	-6.51
August	640.92	680.16	6.12
September	659.71	624.70	-5.31
October	658.28	639.17	-2.90
November	585.35	616.41	5.31
December	570.92	567.98	-0.51
January	650.74	698.55	7.35
Apr-Jan	6564.67	6482.76	-1.25

Source: ITC

Fig 1:
Change in the exports



Comments

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



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3.1 India's Top Performing Products in US market (Apr–Jan, 2016-17)

- Major 9 products have experienced positive growth during April – January, 2016-17 as compared to the same period during 2015-16

Table-4: Top performing products of India (Mn. \$)

Products	Descriptions	Apr-Jan' 2015-16	Apr-Jan' 2016-17	%change
6302600020	Toilet linen and kitchen linen, of terry towelling of cotton	541.75	552.16	1.92%
6110202079	Women's or girls' pullovers of cotton containing less than 36 percent by weight	145.46	151.03	3.83%
6206403030	Women's blouses, shirts of man-made fibers, not knitted	146.38	149.60	2.20%
6302319010	Other bed linen not printed, knitted, or napped, cotton, not containing embroidery	126.85	127.73	0.69%
6105100010	Men's shirts, knitted or crocheted, of cotton	109.48	115.20	5.23%
6212109020	Brassieres, not containing lace or net or embroidery, of man-made fibers, whether or not knitted	75.05	101.03	34.62%
6204444010	Women's dresses, of artificial fibers, not knitted, containing less than 36 percent by weight	71.87	97.66	35.89%
5703900000	Carpets and other textile floor coverings of other textile	63.20	73.35	16.06%
6205202066	Men's shirts of cotton, not knitted or crocheted, nesoi	69.97	71.10	1.62%

Source: ITC



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3.2 India's Top Products having negative growth (Apr–Jan, 2016-17)

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

Table-5: Top Products having negative growth (Mn \$)

Products	Descriptions	Apr-Jan' 2015-16	Apr-Jan' 2016-17	%change
6302319020	Other bed linen, not printed/knit/napped, cotton sheets, not containing embroidery	513.15	505.55	-1.48%
6110202069	Men's or boys' pullovers of cotton containing less than 36 percent by weight	196.09	187.97	-4.14%
5703102000	Carpets and other textile floor coverings, tufted, whether or not made up: of wool	141.26	134.52	-4.77%
5701104000	Carpets and other textile floor coverings, of wool hand-hooked, tufts	128.05	118.93	-7.12%
5407200000	Woven fabrics of synthetic filament yarn; obtained from strip or the like	123.24	113.40	-7.98%
6206303041	Women's blouses, shirts of cotton, not knitted or crocheted, nesoi	122.54	100.71	-17.81%
6107110010	Men's underpants and briefs, knitted or crocheted, of cotton	108.36	97.01	-10.48%
6206303011	Women's blouses, shirts of cotton, with two or more colors in the warp	104.58	93.82	-10.29%
6305320010	Sacks and bags, of a kind used for the packing of goods, of man-made textile materials: flexible	93.64	91.93	-1.83%
6205202051	Men's shirts of cotton, with two or more colors in the warp and/or the filling, not knitted	93.75	77.27	-17.58%
6302219020	Other bed linen: printed, not knit, cotton sheets, not napped, not containing embroidery	96.08	72.70	-24.34%

Source: ITC

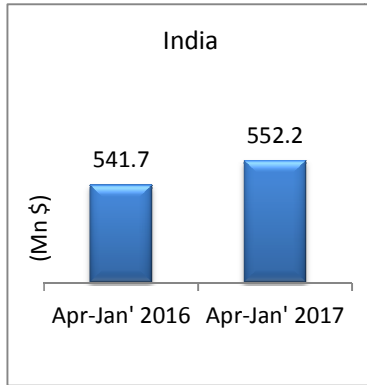


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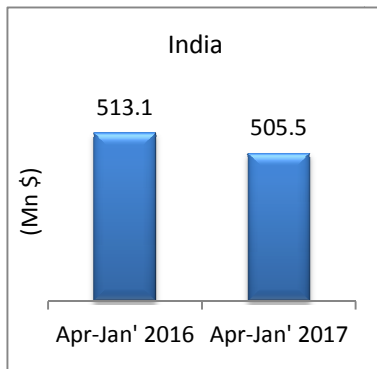
4.0 India's Product wise Performance vis-à-vis Competitors (Apr-Jan, 2016-17) over previous year

1. Toilet linen and kitchen linen, of terry toweling, of cotton (6302600020)



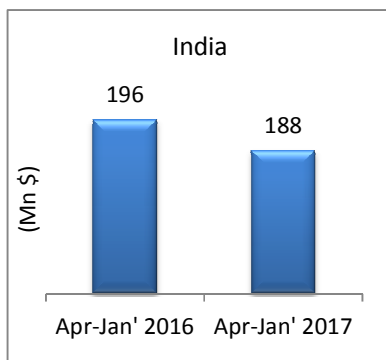
Rank	Country	%Change
1	India	↑ 1.92%
2	China	↓ -4.52%
3	Pakistan	↓ -3.19%
4	Turkey	↑ 18.11%
5	Colombia	↓ -10.05%
6	Bangladesh	↓ -16.74%
7	Egypt	↓ -8.36%
8	El Salvador	↓ -30.01%
9	Portugal	↓ -12.20%
10	Canada	↓ -12.87%

2. Other bed linen, not printed/knit/napped, cotton sheets, not containing embroidery (6302319020)



Rank	Country	% Change
1	India	↓ -1.48%
2	China	↓ -15.95%
3	Pakistan	↓ -2.81%
4	Bahrain	↑ 3.39%
5	Italy	↑ 11.76%
6	Portugal	↓ -31.13%
7	Cambodia	↓ -21.64%
8	Bangladesh	↑ 19.46%
9	Egypt	↑ 6.34%
10	Turkey	↑ 33.46%

3. Men's or boys' pullovers of cotton containing less than 36 percent by weight (6110202069)



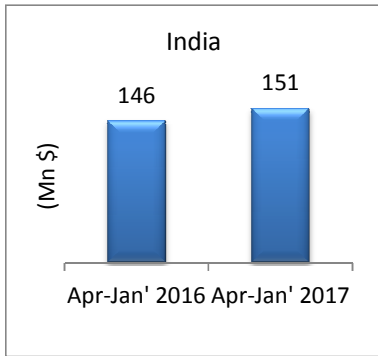
Rank	Country	%Change
1	China	↓ -9.24%
2	Viet Nam	↑ 3.95%
3	India	↓ -4.14%
4	Honduras	↓ -11.05%
5	Bangladesh	↓ -8.84%
6	Indonesia	↓ -22.14%
7	El Salvador	↑ 20.21%
8	Nicaragua	↓ -14.65%
9	Guatemala	↓ -21.62%
10	Pakistan	↓ -9.84%



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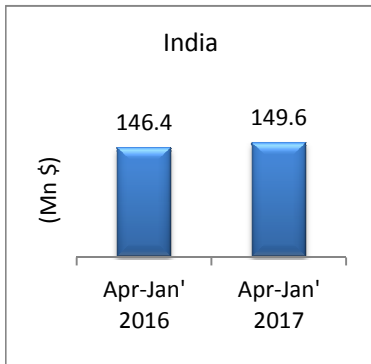
(April-January, 2016-17)

4. Women's or girls' pullovers of cotton containing less than 36 percent by weight (6110202079)



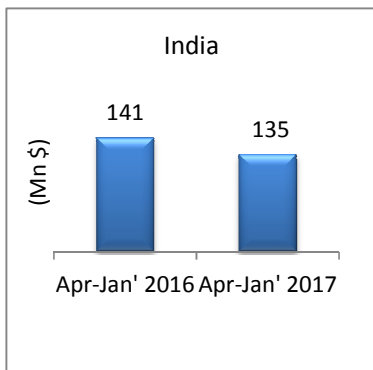
Rank	Country	%Change
1	China	-16.78%
2	Viet Nam	-4.15%
3	Indonesia	-15.37%
4	India	3.83%
5	Cambodia	-25.69%
6	Guatemala	-26.05%
7	Nicaragua	8.91%
8	Bangladesh	4.17%
9	Sri Lanka	-5.48%
10	Jordan	8.29%

5. Women's blouses, shirts of man-made fibers, not knitted (6206403030)



Rank	Country	%Change
1	China	3.34%
2	Indonesia	-3.92%
3	Viet Nam	18.30%
4	India	2.20%
5	Bangladesh	84.39%
6	Philippines	-5.38%
7	Mexico	93.33%
8	Turkey	-26.76%
9	Egypt	-16.83%
10	Italy	-2.34%

6. Carpets and other textile floor coverings, tufted: of wool (5703102000)



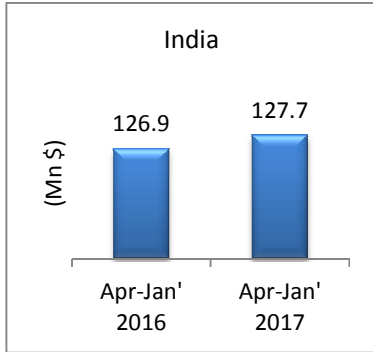
Rank	Country	%Change
1	India	-4.77%
2	China	-21.80%
3	Thailand	59.93%
4	New Zealand	3.88%
5	Netherlands	23.79%
6	Italy	73.93%
7	Canada	1.81%
8	Sweden	-6.46%
9	Belgium	15.26%
10	Hong Kong	0.28%



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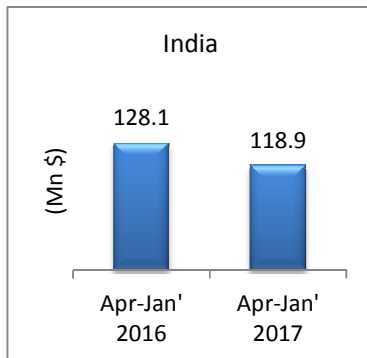
(April-January, 2016-17)

7. Other bed linen not printed, knitted, of cotton, not containing embroidery (6302319010)



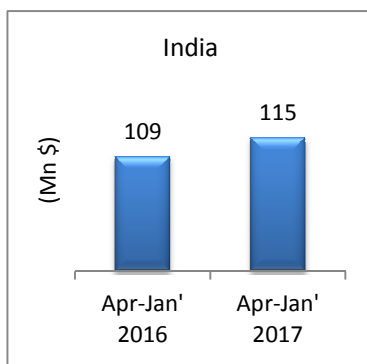
Rank	Country	%Change
1	India	0.69%
2	China	-9.27%
3	Pakistan	-5.15%
4	Bahrain	-11.28%
5	Italy	41.10%
6	Bangladesh	42.19%
7	Portugal	-29.63%
8	Cambodia	-19.02%
9	Israel	137.86%
10	Egypt	2.61%

8. Carpets and other textile floor coverings, of wool hand-hooked, tufts (5701104000)



Rank	Country	%Change
1	India	-7.12%
2	Pakistan	-22.15%
3	Nepal	17.54%
4	Turkey	-17.82%
5	China	-19.00%
6	Afghanistan	28.00%
7	UAE	187.50%
8	Morocco	-15.97%
9	Egypt	-66.32%
10	Hong Kong	116.67%

9. Men's shirts, knitted or crocheted, of cotton (6105100010)



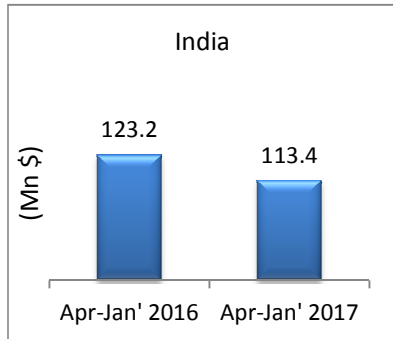
Rank	Country	%Change
1	Viet Nam	3.21%
2	India	5.23%
3	China	-28.25%
4	Pakistan	-19.03%
5	Indonesia	-7.16%
6	Peru	-14.53%
7	Bangladesh	-12.60%
8	Cambodia	-24.92%
9	Sri Lanka	-14.63%
10	Guatemala	25.81%



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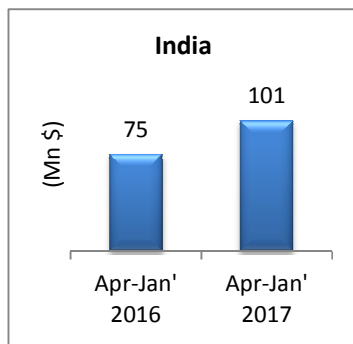
(April-January, 2016-17)

10. Woven fabrics of synthetic filament yarn; obtained from strip or the like (5407200000)



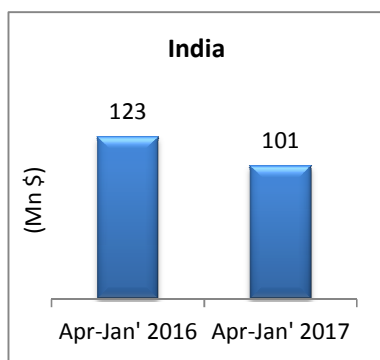
Rank	Country	%Change
1	India	-7.98%
2	China	26.68%
3	Saudi Arabia	-11.04%
4	UAE	-32.42%
5	Viet Nam	-5.78%
6	Turkey	-35.13%
7	Canada	6.72%
8	Korea, Rep.	-7.93%
9	Greece	-15.91%
10	UK	6.16%

11. Brassieres, not containing lace or net or embroidery, of man-made fibers, whether or not knitted (6212109020)



Rank	Country	%Change
1	China	-8.34%
2	Sri Lanka	0.74%
3	Viet Nam	208.82%
4	India	34.62%
5	Indonesia	-15.76%
6	Dominican Rep.	-7.11%
7	Honduras	-6.90%
8	El Salvador	14.06%
9	Thailand	-20.73%
10	Bangladesh	10.73%

12. Women's blouses, shirts of cotton, not knitted or crocheted, nesoi (6206303041)



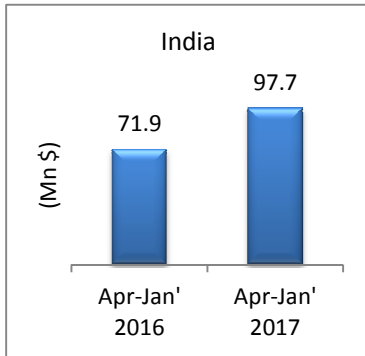
Rank	Country	%Change
1	China	-1.32%
2	India	-17.81%
3	Bangladesh	19.02%
4	Indonesia	-12.04%
5	Viet Nam	-1.24%
6	Thailand	-36.39%
7	Italy	4.21%
8	Sri Lanka	-15.78%
9	Mexico	18.60%
10	Philippines	-2.66%



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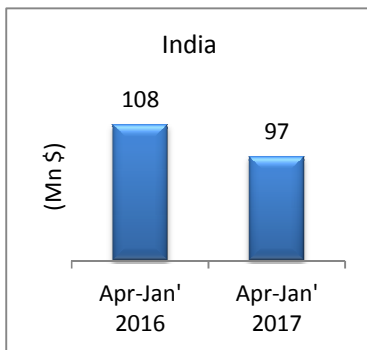
(April-January, 2016-17)

13. Women's dresses, of artificial fibers, not knitted, containing less than 36 percent by weight (6204444010)



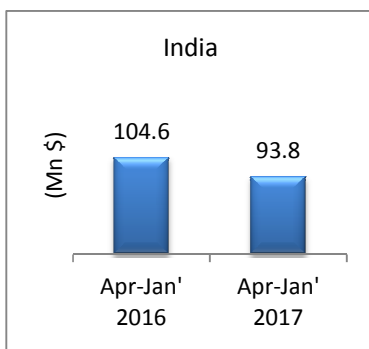
Rank	Country	%Change
1	China	↑ 17.64%
2	India	↑ 35.89%
3	Viet Nam	↑ 92.25%
4	Indonesia	↑ 68.56%
5	Italy	↑ 0.93%
6	France	↓ -3.89%
7	Turkey	↑ 84.67%
8	Cambodia	↑ 43.65%
9	United Kingdom	↑ 14.27%
10	Romania	↑ 22.28%

14. Men's underpants and briefs, knitted or crocheted, of cotton (6107110010)



Rank	Country	%Change
1	Viet Nam	↓ -6.57%
2	El Salvador	↑ 4.81%
3	India	↓ -10.48%
4	Honduras	↓ -2.37%
5	China	↓ -14.88%
6	Sri Lanka	↓ -12.16%
7	Bangladesh	↓ -9.72%
8	Cambodia	↓ -15.08%
9	Pakistan	↓ -8.26%
10	Thailand	↓ -12.12%

15. Women's blouses, shirts of cotton, with two or more colors in the warp (6206303011)



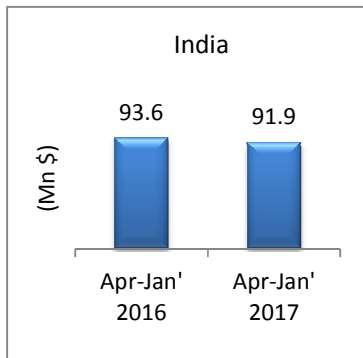
Rank	Country	%Change
1	India	↓ -10.29%
2	China	↓ -8.05%
3	Indonesia	↓ -10.25%
4	Sri Lanka	↑ 19.12%
5	Bangladesh	↓ -18.44%
6	Viet Nam	↓ -33.46%
7	Cambodia	↓ -1.72%
8	Mauritius	↓ -10.25%
9	Thailand	↓ -18.91%
10	El Salvador	↑ 26.50%



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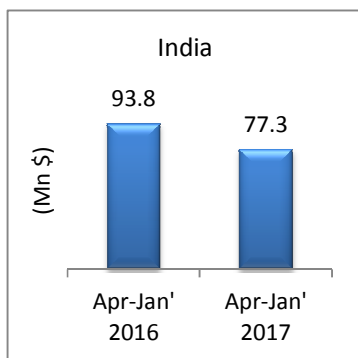
(April-January, 2016-17)

16. Sacks and bags, of a kind used for the packing of goods, of man-made textile materials: flexible (6305320010)



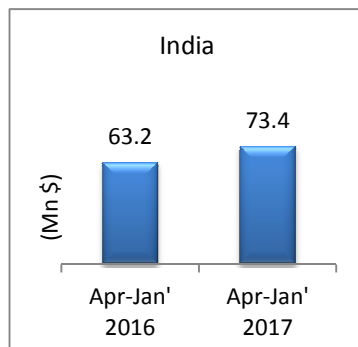
Rank	Country	%Change
1	India	-1.83%
2	China	-11.95%
3	Mexico	-2.63%
4	Turkey	-8.57%
5	Indonesia	-60.35%
6	Viet Nam	78.58%
7	Thailand	-72.30%
8	Korea, Rep.	65.00%
9	Cambodia	426.53%
10	Hong Kong	25.91%

17. Men's shirts of cotton, with two or more colors in the warp and/or the filling, not knitted (6205202051)



Rank	Country	%Change
1	Bangladesh	-5.02%
2	China	-5.64%
3	Viet Nam	16.46%
4	Mauritius	-23.53%
5	India	-17.58%
6	Sri Lanka	-0.73%
7	Indonesia	-16.12%
8	Philippines	-20.62%
9	El Salvador	-24.05%
10	Malaysia	-44.71%

18. Carpets and other textile floor coverings of other textile (5703900000)



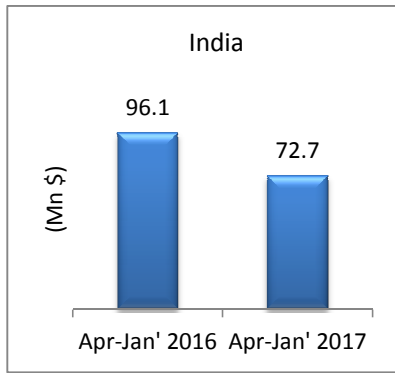
Rank	Country	%Change
1	India	16.06%
2	China	-15.63%
3	Hong Kong	4.03%
4	Portugal	5.94%
5	Turkey	135.13%
6	Thailand	6.30%
7	Italy	291.07%
8	Nepal	766.67%
9	Spain	-84.06%
10	Netherlands	-27.15%



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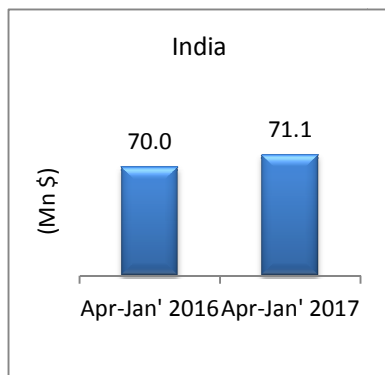
(April-January, 2016-17)

19. Other bed linen: printed, not knit, cotton sheets, not napped, not containing embroidery (6302219020)



Rank	Country	%Change
1	China	20.71%
2	India	-24.34%
3	Pakistan	-20.47%
4	Bahrain	-0.43%
5	Israel	-0.04%
6	Portugal	-20.77%
7	Thailand	-10.82%
8	Mexico	104.82%
9	Italy	55.19%
10	France	-36.75%

20. Men's shirts of cotton, not knitted or crocheted, nesoi (6205202066)



Rank	Country	%Change
1	China	-14.75%
2	Bangladesh	1.30%
3	India	1.62%
4	Viet Nam	1.73%
5	Indonesia	-7.57%
6	Mexico	-15.27%
7	Italy	-14.60%
8	Mauritius	38.04%
9	Turkey	-4.16%
10	El Salvador	104.51%