



EU Market Watch (Apr-Nov'2016)

1.0 Introduction:

The EU is the largest T&C market of the world followed by US and imported \$ 237.17 billion during 2015. EU T&C imports from the rest of the world were \$ 160.88 billion during the period Apr-Nov'15 as compared to \$ 166.81 billion during the same period in 2016 registering a positive growth of 3.69%.

Tab-1:EU import of T&C

Period	Import (\$ Bn)
2015	237.17
April-Nov'15	160.88
April-Nov'16	166.81
Growth (%)	(+) 3.69

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 Italy 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-November'2016** 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-Nov'16):

2.1 Extra-EU:

- EU T&C imports from the extra EU were \$ 86.13 billion in Apr-Nov'16.
- 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).



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- The clothing import from extra EU was to the tune of \$ 71.56 billion (83.08%) during Apr-Nov'16 whereas imports in textiles items were worth \$ 14.57 billion (16.92%).
- China was leading in textiles and clothing export in EU market with \$ 29.85 billion contributing 34.85 percent during Apr-Nov'16.
- Bangladesh was distant second with \$ 11.77 billion followed by Turkey with \$ 11.04 billion, India \$ 5.92 billion and Pakistan \$ 3.78 billion during Apr-Nov'16.
- Bangladesh's share in the overall export of T&C was 13.74% followed by Turkey (12.89%), India (6.91%) and Pakistan (4.42%) etc.

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

Exporter	Apr-Nov' 15	Apr-Nov' 16	% Change
China	31.00	29.85	↓ -3.70%
Bangladesh	10.77	11.77	↑ 9.33%
Turkey	10.99	11.04	↑ 0.51%
India	5.80	5.92	↑ 2.04%
Pakistan	3.55	3.78	↑ 6.64%
RoW	22.76	23.77	↑ 4.43%
Extra-EU	84.85	86.13	↑ 1.50%

Source: Eurostat

2.2 Intra-EU:

- EU T&C imports from the intra EU were \$ 80.68 billion in Apr-Nov'16.
- EU import from intra EU of T&C was slightly 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 \$ 55.58 billion (68.89%) during Apr-Nov'16 whereas imports in textiles items were worth \$ 25.10 billion (31.11%).
- Germany was leading in textiles and clothing export in intra EU market with \$ 16.11 billion contributing 19.97 percent during Apr-Nov'16.



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- Italy was distant second with \$ 11.18 billion followed by Netherlands with \$ 7.17 billion, France \$ 6.05 billion and Spain \$ 5.73 billion during Apr-Nov'16.
- Italy's share in the overall export of T&C was 13.86% followed by Netherland (8.89%), France (7.50%) and Spain (7.11%) etc.

Table-3: Top exporters to EU during Apr-Nov'16 (\$ Bn)

Exporter	Apr-Nov' 15	Apr-Nov' 16	% Change
Germany	14.92	16.11	↑ 8.01%
Italy	10.87	11.18	↑ 2.92%
Netherlands	6.61	7.17	↑ 8.43%
France	5.94	6.05	↑ 1.81%
Spain	5.26	5.73	↑ 8.88%
RoEU	32.42	34.43	↑ 6.18%
Intra-EU	76.03	80.68	↑ 6.11%

Source: Eurostat

3.0 India as an Exporter of T&C to EU (Apr-Nov' 2016):

- India's T&C export to EU during Apr-Nov' 2016 was \$ 5.92 billion as compared to \$ 5.80 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 \$ 1.21 billion during Apr-Nov'16 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 \$ 4.71 billion during Apr-Nov'16 which is 33 percent of India's total clothing exports to the world.
- Top 21 Products (whose share is more than 1%) contributed 50.16 percent to the export basket in EU market during Apr-Nov'16.
- The share of these top 21 products was 49.82 percent in the same period of 2015.



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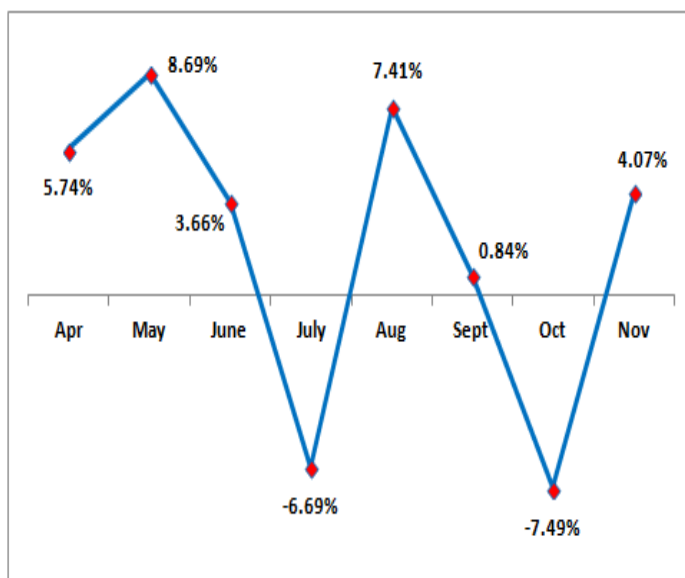
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Table-4
India's T&C Exports to EU (Mn. \$)

Month	April-November		
	2015	2016	% Change
April	845.11	893.61	5.74
May	717.29	779.60	8.69
June	755.94	783.63	3.66
July	793.74	740.62	-6.69
August	723.49	777.13	7.41
September	696.36	702.21	0.84
October	675.77	625.18	-7.49
November	591.73	615.82	4.07
Apr-Nov	5799.4	5917.8	2.04

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–Nov'16)

- Major 11 products have experienced positive growth during April – November'2016 as compared to the same period during 2015

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

Products	Descriptions	Apr-Nov' 15	Apr-Nov' 16	% change
61091000	T-shirts, singlets and other vests of cotton, knitted	488.97	498.51	1.95
62064000	Women's or girls blouses, shirts of man-made fibres, not knitted	284.05	284.09	0.01
61112090	Babies' garments accessories, of cotton, knitted	192.00	227.03	18.24
62063000	Women's or girls blouses, shirts of cotton, not knitted	171.35	176.39	2.94
63053219	Flexible intermediate bulk containers, of polyethylene, woven	148.63	153.15	3.04
61046200	Women's or girls trousers, bib and brace overalls of cotton, knitted	131.69	142.15	7.94
63026000	Toilet linen and kitchen linen, of terry towelling of cotton	107.54	117.66	9.41
62044400	Women's or girls dresses of artificial fibres, not knitted	79.05	95.85	21.26
61099020	T-shirts, singlets of artificial fibres, knitted	70.45	80.81	14.71
61102091	Men's or boys' jerseys, pullovers, of cotton, knitted	64.71	65.11	0.62
62034235	Men's or boys' trousers of cotton, woven	56.07	62.46	11.40
Total		1794.52	1903.22	6.06

Source: Eurostat



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3.2 India's Top Products having negative growth (Apr–Nov'16)

- Major 10 products have experienced negative growth during April – November'2016 as compared to the same period during 2015

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

Products	Descriptions	Apr-Nov' 15	Apr-Nov' 16	% change
62052000	Men's or boys shirts of cotton, not knitted	208.90	200.74	-3.91
61083100	Women's or girls nightdresses of cotton, knitted	121.79	118.81	-2.44
62044300	Women's or girls dresses of synthetic fibres , not knitted	111.99	93.46	-16.54
61051000	Men's or boys shirts of cotton, knitted or crocheted	90.52	82.00	-9.41
62044200	Women's or girls dresses of cotton, not knitted	89.12	78.60	-11.81
61072100	Men's or boys nightshirts of cotton, knitted or crocheted	71.42	70.52	-1.27
61102099	Women's or girls' jerseys, pullovers, of cotton, knitted	72.49	70.19	-3.18
62114390	Women's or girls' garments, of m-m fibres, woven	69.98	62.66	-10.46
61071100	Men's or boys underpants and briefs of cotton, knitted	65.58	59.80	-8.81
63025100	Table linen of cotton, not knitted	60.55	57.73	-4.67
Total		962.35	894.51	-7.05

Source: Eurostat

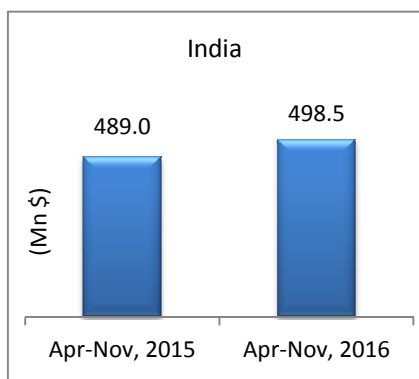


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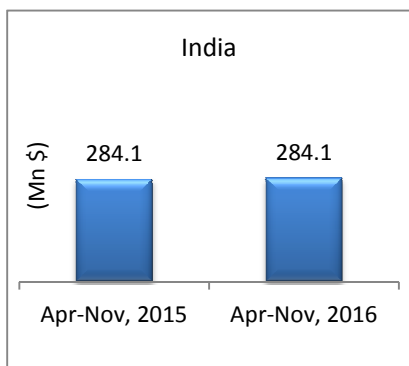
4.0 India's Product wise Performance vis-à-vis Competitors (Apr-Nov'16) over previous year

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



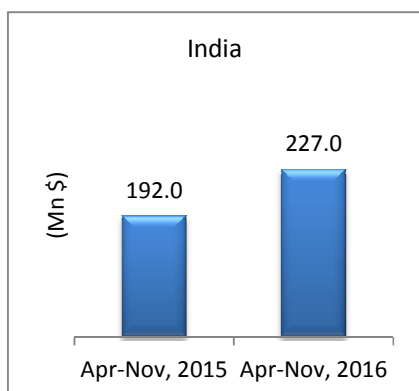
Rank	County	% change
1	Bangladesh	2.68%
2	Germany	2.87%
3	Turkey	2.45%
4	India	1.95%
5	Netherlands	9.68%
6	Belgium	5.25%
7	China	-16.96%
8	Italy	15.42%
9	UK	11.67%
10	Spain	14.88%

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



Rank	County	% change
1	China	-2.90%
2	India	0.01%
3	Germany	19.47%
4	Spain	1.79%
5	Turkey	-10.24%
6	Morocco	4.29%
7	Romania	-11.32%
8	Bangladesh	23.91%
9	Poland	18.73%
10	UK	16.75%

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

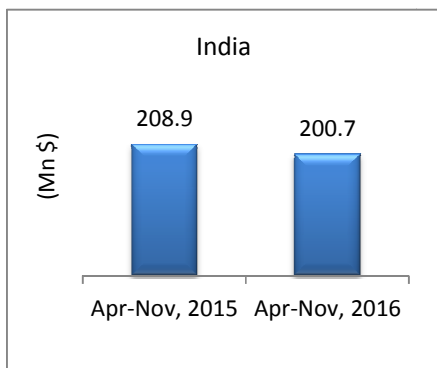


Rank	County	% change
1	China	-11.92%
2	Bangladesh	6.76%
3	India	18.24%
4	Germany	73.17%
5	France	7.08%
6	Poland	48.32%
7	Turkey	8.92%
8	Netherlands	30.34%
9	Sri Lanka	3.59%
10	Spain	13.47%



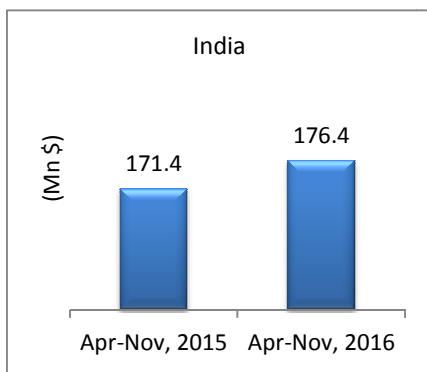
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4. Men's or boys shirts of cotton, not knitted (62052000)



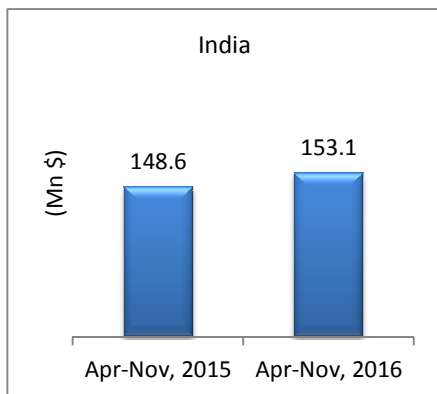
Rank	Country	% change
1	Bangladesh	-1.21%
2	China	-20.05%
3	Germany	-0.48%
4	Turkey	-7.98%
5	India	-3.91%
6	Italy	-6.39%
7	Netherlands	-5.64%
8	Spain	5.11%
9	Vietnam	4.78%
10	UK	-8.13%

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



Rank	Country	% change
1	India	2.94%
2	Bangladesh	1.37%
3	Germany	15.95%
4	China	-12.89%
5	Spain	47.81%
6	Turkey	0.93%
7	Morocco	76.11%
8	Italy	2.40%
9	Poland	44.13%
10	Netherlands	18.12%

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

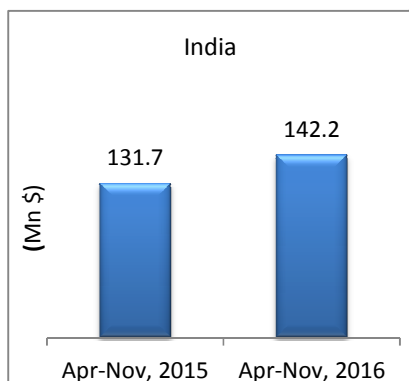


Rank	Country	% change
1	India	3.04%
2	Turkey	1.60%
3	Bangladesh	-6.00%
4	Belgium	20.34%
5	Czech Rep.	14.55%
6	Romania	-4.08%
7	Netherlands	2.29%
8	Germany	14.61%
9	China	-12.45%
10	Serbia	1.13%



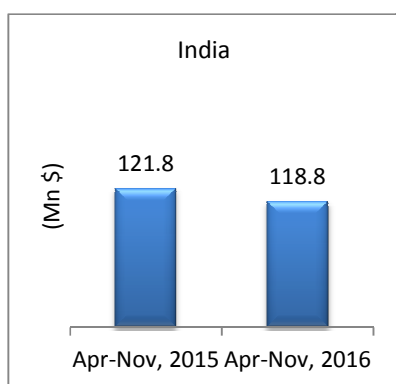
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7. Women's or girls trousers bib and brace overalls of cotton, knitted (61046200)



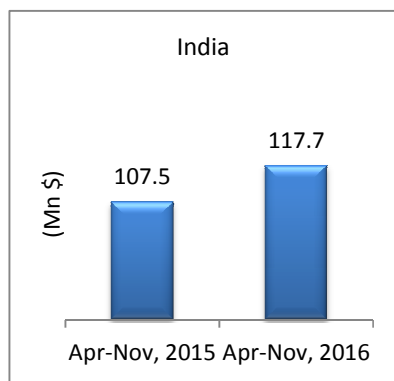
Rank	Country	% change
1	Bangladesh	7.85%
2	Germany	22.51%
3	China	-15.35%
4	India	7.94%
5	Cambodia	9.39%
6	Belgium	10.85%
7	Turkey	-23.72%
8	Netherlands	14.89%
9	France	10.57%
10	Poland	47.22%

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



Rank	Country	% change
1	India	-2.44%
2	Bangladesh	6.48%
3	China	-26.67%
4	Germany	-6.20%
5	Turkey	-2.67%
6	Netherlands	-0.80%
7	Belgium	-0.39%
8	Poland	17.99%
9	Cambodia	0.64%
10	Italy	4.17%

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



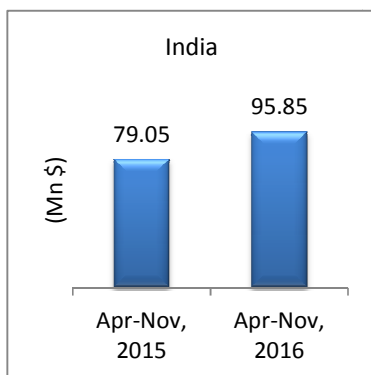
Rank	Country	% change
1	Turkey	12.30%
2	Pakistan	8.25%
3	India	9.41%
4	Portugal	-4.06%
5	China	0.78%
6	Netherlands	30.65%
7	Belgium	-9.15%
8	Germany	3.45%
9	Bangladesh	18.26%
10	Egypt	3.31%



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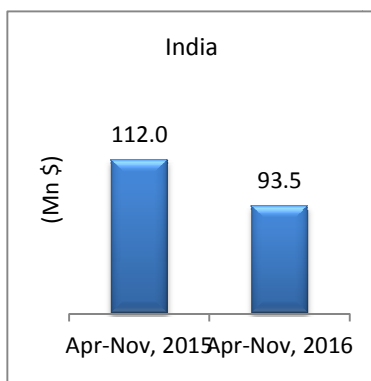
(April-November'2016)

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



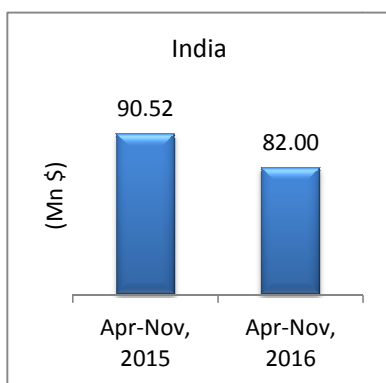
Rank	Country	% change
1	China	-1.66%
2	India	21.26%
3	Germany	61.92%
4	Spain	10.52%
5	Morocco	7.22%
6	Italy	0.18%
7	Turkey	28.32%
8	France	0.62%
9	UK	31.41%
10	Poland	201.72%

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



Rank	Country	% change
1	China	-2.39%
2	Germany	24.85%
3	UK	42.55%
4	Spain	-3.09%
5	India	-16.54%
6	Poland	8.79%
7	Italy	18.52%
8	Turkey	1.90%
9	Romania	-11.44%
10	Morocco	13.80%

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

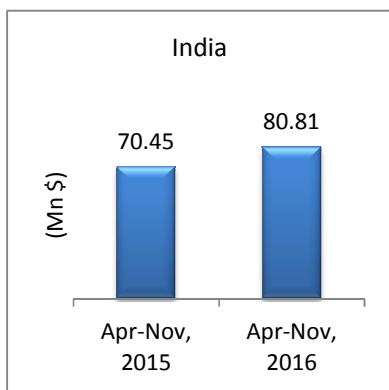


Rank	Country	% change
1	Bangladesh	1.77%
2	Germany	10.20%
3	China	-17.61%
4	Turkey	6.34%
5	Italy	-8.14%
6	India	-9.41%
7	Netherlands	-1.30%
8	France	2.81%
9	Vietnam	12.87%
10	Belgium	-0.20%



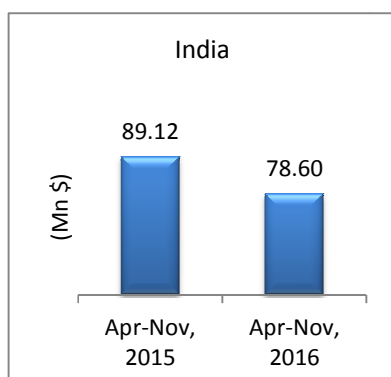
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13. T-shirts, singlets of artificial fibres, knitted (61099020)



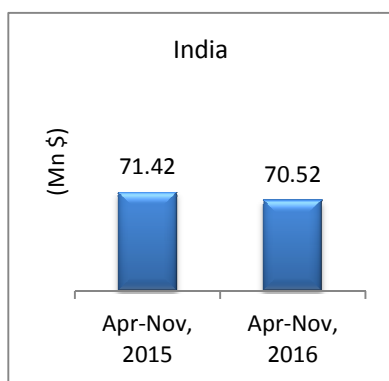
Rank	Country	% change
1	Turkey	-4.17%
2	China	-5.91%
3	Germany	6.19%
4	Belgium	16.86%
5	Bangladesh	14.08%
6	Spain	7.04%
7	Cambodia	25.01%
8	Netherlands	19.85%
9	France	9.70%
12	India	14.71%

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



Rank	Country	% change
1	China	-8.28%
2	India	-11.81%
3	Germany	31.41%
4	Italy	1.64%
5	Turkey	16.11%
6	Spain	14.57%
7	UK	7.24%
8	Morocco	27.38%
9	France	-6.10%
10	Poland	42.14%

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

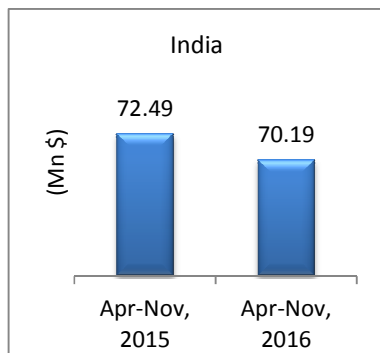


Rank	Country	% change
1	India	-1.27%
2	Bangladesh	8.94%
3	China	-15.32%
4	Germany	0.98%
5	Belgium	-17.33%
6	Turkey	-9.25%
7	Netherlands	-17.73%
8	France	15.57%
9	Poland	16.20%
10	Cambodia	15.84%



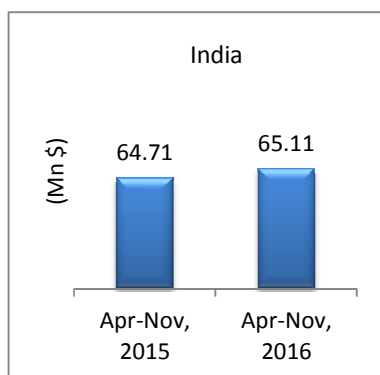
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16. Women's or girls' jerseys, pullovers, of cotton, knitted (61102099)



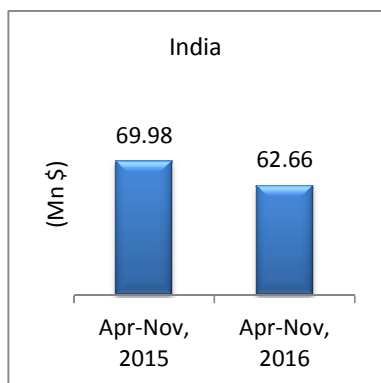
Rank	Country	% change
1	China	-14.26%
2	Bangladesh	2.77%
3	Germany	12.82%
4	Turkey	-1.78%
5	Cambodia	3.44%
6	Netherlands	21.88%
7	Poland	59.72%
8	Belgium	12.86%
9	Italy	0.56%
12	India	-3.18%

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



Rank	Country	% change
1	China	-7.91%
2	Bangladesh	2.70%
3	Netherlands	13.00%
4	Turkey	6.07%
5	Italy	1.14%
6	Germany	2.36%
7	Pakistan	17.91%
8	Denmark	-9.86%
9	UK	20.06%
12	India	0.62%

18. Women's or girls' garments, of manmade fibres, woven (62114390)



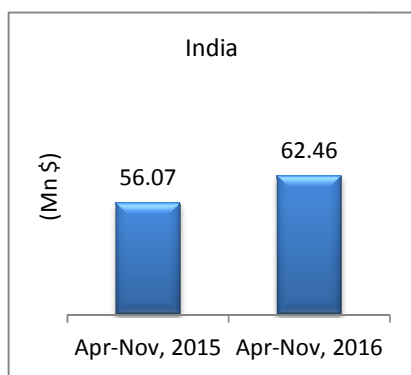
Rank	Country	% change
1	China	-11.15%
2	Germany	2.35%
3	India	-10.46%
4	Spain	1.76%
5	Morocco	10.78%
6	Poland	8.02%
7	Turkey	24.49%
8	UK	57.43%
9	France	6.04%
10	Netherlands	-16.59%



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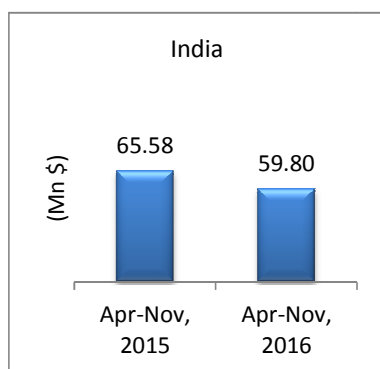
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19. Men's or boys' trousers of cotton, woven (62034235)



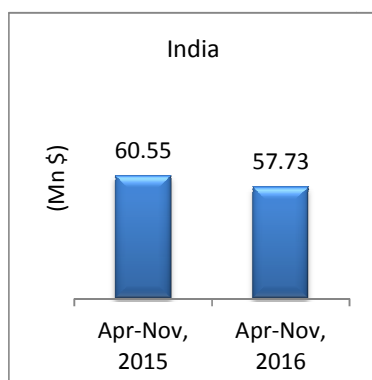
Rank	Country	% change
1	Bangladesh	9.80%
2	Germany	23.61%
3	China	-19.22%
4	Turkey	-0.27%
5	Spain	9.90%
6	Tunisia	-5.33%
7	Italy	4.62%
8	Belgium	6.28%
9	Pakistan	5.75%
13	India	11.40%

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



Rank	Country	% change
1	China	-5.31%
2	Bangladesh	16.91%
3	Netherlands	14.63%
4	Germany	16.04%
5	India	-8.81%
6	Sri Lanka	-13.85%
7	Italy	-4.56%
8	Cambodia	5.24%
9	France	4.77%
10	Austria	10.59%

21. Table linen of cotton, not knitted (63025100)



Rank	Country	% change
1	India	-4.67%
2	Germany	-1.48%
3	China	-10.21%
4	Turkey	-8.69%
5	Portugal	6.66%
6	Italy	26.88%
7	Egypt	-9.25%
8	Pakistan	6.45%
9	Tunisia	-7.58%
10	Netherlands	106.65%