



US Market Watch (Apr-Dec'2016)

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 \$ 91.69 billion during the period Apr-Dec'15 as compared to \$ 86.37 billion during the same period in 2016 registering a negative growth of 5.80%.

Tab-1:US import of T&C

Period	Import (\$ Bn)
2016	113.59
April-Dec'15	91.69
April-Dec'16	86.37
Growth (%)	(-) 5.80

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-December'2016** 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-Dec'16):

- US T&C imports from the rest of the world were \$ 86.37 billion in Apr-Dec'16.
- 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 \$ 75.12 billion (86.97%) during Apr-Dec'16 whereas imports in textiles items were worth \$ 11.25 billion (13.03%).



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- China was leading in textiles and clothing export in US market with \$ 32.11 billion contributing 37.18 percent during Apr-Dec'16.
- Vietnam was distant second with \$ 8.71 billion followed by India with \$ 5.78 billion, Bangladesh \$ 4.02 billion and Mexico \$ 3.98 billion during Apr-Dec'16.
- Vietnam's share in the overall export of T&C was 10.09% followed by India (6.70%), Bangladesh (4.65%) and Mexico (4.61%) etc.

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

Exporter	Apr-Dec'15	Apr-Dec'16	%Change
China	34.82	32.11	↓ -7.78
Viet Nam	8.67	8.71	↑ 0.47
India	5.91	5.78	↓ -2.19
Bangladesh	4.22	4.02	↓ -4.80
Mexico	4.09	3.98	↓ -2.69
RoW	33.97	31.76	↓ -6.49
World	91.69	86.37	↓ -5.80

Source:ITC

3.0 India as an Exporter of T&C to US (Apr- Dec'16):

- India's T&C export to US during Apr-Dec'16 was \$ 5.78 billion as compared to \$ 5.91 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 2.19% over the same period of previous year.
- India's aggregate export of textiles to US (Chapter 50 to 60) was \$ 1.27 billion during Apr-Dec'16 which is 11 percent of India's total textiles exports to the world.
- India's aggregate export of clothing to US (Chapter 61 to 63) was \$ 4.52 billion during Apr-Dec'16 which is 28 percent of India's total clothing exports to the world.
- Top 21 Products (whose share is more than 1%) contributed 47.89 percent to the export basket in US market during Apr-Dec'16.



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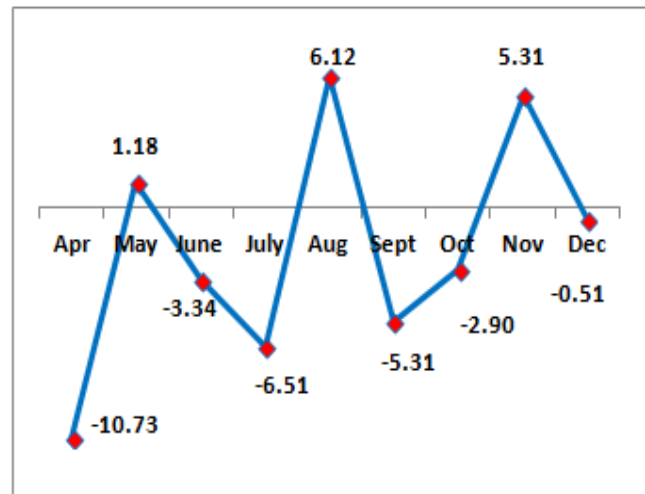
- The share of these top 21 products was 47.44 percent in the same period of 2015

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

Month	April-December		
	2015	2016	%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
Apr-Dec	5913.93	5784.21	-2.19

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-Dec'16)

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

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

Products	Descriptions	Apr-Dec' 15	Apr-Dec' 16	% Change
6302600020	Toilet linen and kitchen linen, of terry towelling of cotton	482.00	492.18	2.11
6110202069	Men's/boys' pullovers of cotton containing less than 36 percent by weight, knitted	169.71	170.65	0.56
6206403030	Women's blouses, shirts of man-made fibers, not knitted	129.64	133.09	2.66
6302319010	Other bed linen not printed, knitted, or napped, cotton, not containing embroidery	112.57	113.60	0.91
6105100010	Men's shirts, knitted or crocheted, of cotton	97.63	98.47	0.87
6212109020	Brassieres, not containing lace or net or embroidery, of man-made fibers, whether or not knitted	67.70	93.11	37.53
6204444010	Women's dresses, of artificial fibers, not knitted, containing less than 36 percent by weight	66.25	84.61	27.71
5703900000	Carpets and other textile floor coverings of other textile	56.17	65.59	16.76
6205202066	Men's shirts of cotton, not knitted or crocheted, nesoi	60.80	61.00	0.32
Total		1242.47	1312.31	5.62

Source: ITC



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3.2 India's Top Products having negative growth (Apr-Dec'16)

- Major 12 products have experienced negative growth during April – December, 2016 as compared to the same period during 2015

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

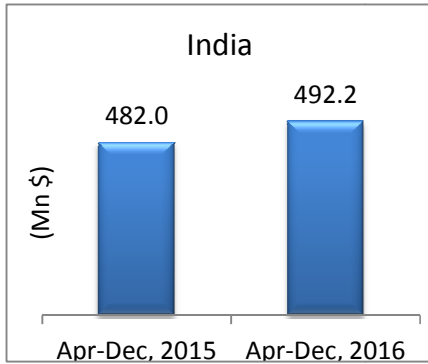
Products	Descriptions	Apr-Dec' 15	Apr-Dec' 16	% Change
6302319020	Other bed linen, not printed/knit/napped, cotton sheets, not containing embroidery	458.32	454.57	-0.82
6110202079	Women's or girls' pullovers of cotton containing less than 36 percent by weight	132.59	130.75	-1.39
5703102000	Carpets and other textile floor coverings, tufted, whether or not made up: of wool	127.85	122.58	-4.12
5701104000	Carpets and other textile floor coverings, of wool hand-hooked, tufts	114.41	106.74	-6.71
5407200000	Woven fabrics of synthetic filament yarn; obtained from strip or the like	110.36	103.83	-5.91
6107110010	Men's underpants and briefs, knitted or crocheted, of cotton	96.67	87.92	-9.06
6206303041	Women's blouses, shirts of cotton, not knitted or crocheted, nesoi	106.69	87.46	-18.03
6206303011	Women's blouses, shirts of cotton, with two or more colors in the warp	91.92	87.33	-5.00
6305320010	Sacks and bags, of a kind used for the packing of goods, of man-made textile materials: flexible	83.26	82.88	-0.46
6205202051	Men's shirts of cotton, with two or more colors in the warp and/or the filling, not knitted	80.59	69.63	-13.60
6302219020	Other bed linen: printed, not knit, cotton sheets, not napped, not containing embroidery	89.19	66.39	-25.57
6108210010	Women's briefs and panties, knitted or crocheted, of cotton	71.28	57.86	-18.83
Total		1563.12	1457.93	-6.73

Source: ITC



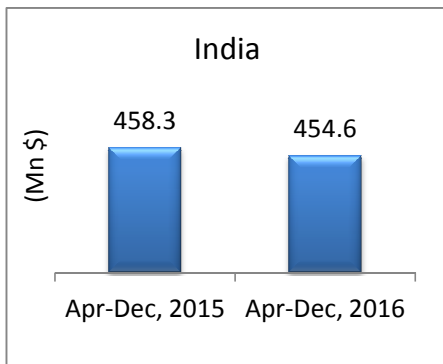
4.0 India's Product wise Performance vis-à-vis Competitors (Apr-Dec'16) over previous year

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



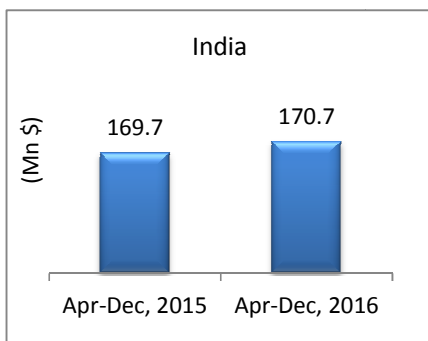
Rank	Country	% Change
1	India	2.11%
2	Pakistan	-3.50%
3	China	-8.96%
4	Turkey	14.84%
5	Bangladesh	-17.13%
6	Colombia	-8.77%
7	Egypt	-8.03%
8	El Salvador	-25.71%
9	Canada	-10.88%
10	Portugal	-9.55%

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



Rank	Country	% Change
1	India	-0.82%
2	China	-17.96%
3	Pakistan	-3.72%
4	Bahrain	1.55%
5	Italy	17.28%
6	Bangladesh	15.83%
7	Portugal	-30.88%
8	Cambodia	-21.97%
9	Egypt	-2.29%
10	Turkey	42.95%

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



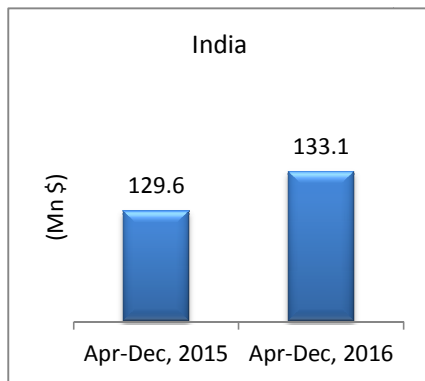
Rank	Country	% Change
1	China	-9.19%
2	Viet Nam	2.17%
3	Honduras	-12.85%
4	India	0.56%
5	El Salvador	22.21%
6	Nicaragua	-14.97%
7	Bangladesh	-9.61%
8	Guatemala	-22.57%
9	Indonesia	-24.47%
10	Pakistan	-12.01%



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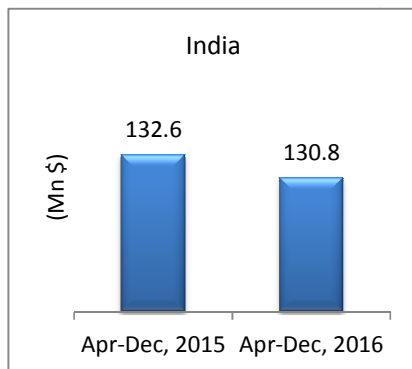
(April-December'2016)

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



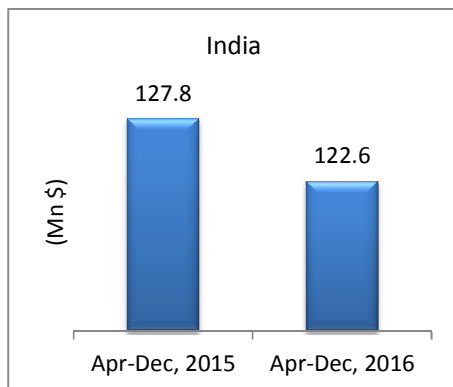
Rank	Country	% Change
1	China	↑ 3.36%
2	Viet Nam	↑ 12.52%
3	Indonesia	↓ -5.92%
4	India	↑ 2.66%
5	Bangladesh	↑ 84.31%
6	Mexico	↑ 88.14%
7	Philippines	↓ -5.66%
8	Turkey	↓ -29.81%
9	Italy	↓ -2.15%
10	Egypt	↓ -15.25%

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



Rank	Country	% Change
1	China	↓ -18.48%
2	Viet Nam	↓ -6.18%
3	Indonesia	↓ -16.40%
4	India	↓ -1.39%
5	Guatemala	↓ -24.90%
6	Bangladesh	↑ 6.38%
7	Cambodia	↓ -27.77%
8	Nicaragua	↑ 9.79%
9	Sri Lanka	↓ -5.15%
10	Honduras	↓ -29.91%

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



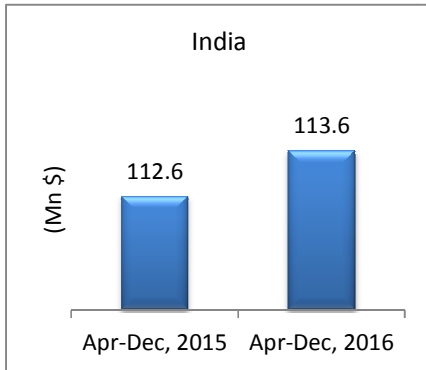
Rank	Country	% Change
1	India	↓ -4.12%
2	China	↓ -15.66%
3	Thailand	↑ 64.23%
4	Italy	↑ 72.68%
5	Sweden	↑ 0.01%
6	Canada	↓ -9.66%
7	Netherlands	↑ 12.44%
8	Turkey	↑ 25.00%
9	Germany	↑ 42.86%
10	Hong Kong	↓ -6.07%



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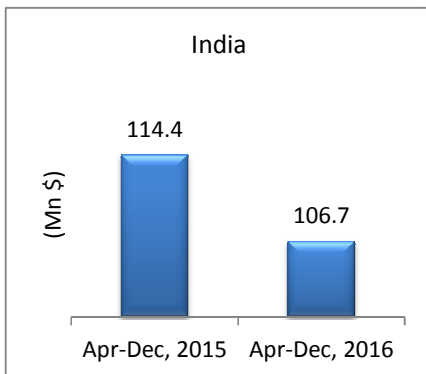
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7. Other bed linen not printed, knitted, of cotton, not containing embroidery (6302319010)



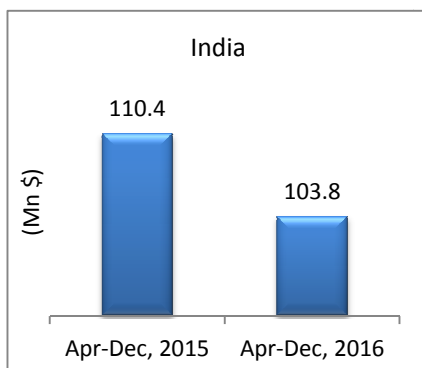
Rank	Country	% Change
1	India	0.91%
2	China	-12.37%
3	Pakistan	-5.03%
4	Bahrain	-15.09%
5	Bangladesh	1.89%
6	Italy	42.63%
7	Portugal	-34.99%
8	Israel	118.40%
9	Cambodia	-18.77%
10	Egypt	3.22%

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



Rank	Country	% Change
1	India	-6.71%
2	Pakistan	-23.10%
3	Nepal	17.32%
4	Turkey	-20.97%
5	China	-16.35%
6	UAE	46.64%
7	Morocco	-7.27%
8	Afghanistan	37.53%
9	Germany	9.42%
10	Denmark	40.00%

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

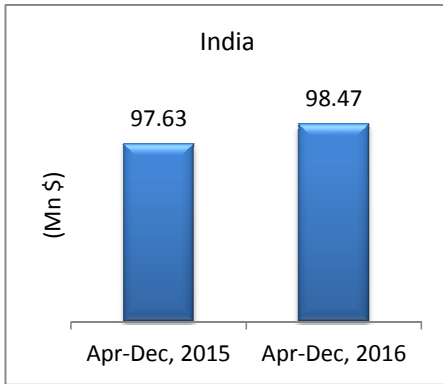


Rank	Country	% Change
1	India	-5.91%
2	China	24.39%
3	Turkey	-33.59%
4	Saudi Arabia	-6.80%
5	Vietnam	-11.40%
6	UAE	-31.87%
7	UK	3.87%
8	Canada	8.89%
9	Netherlands	-7.28%
10	Korea	-6.29%



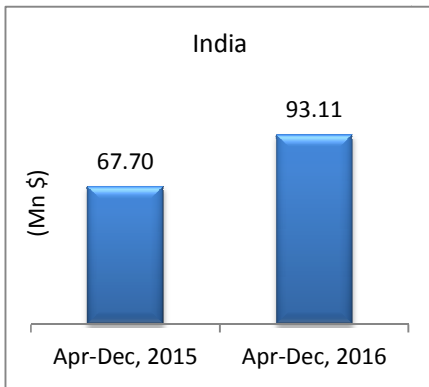
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10. Men's shirts, knitted or crocheted, of cotton (6105100010)



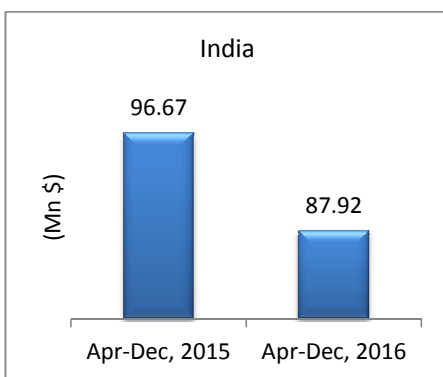
Rank	Country	% Change
1	Viet Nam	4.44%
2	India	0.87%
3	Pakistan	-24.57%
4	China	-28.17%
5	Peru	-18.16%
6	Indonesia	-8.52%
7	Cambodia	-28.52%
8	El Salvador	-45.33%
9	Guatemala	27.91%
10	Bangladesh	-15.77%

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



Rank	Country	% Change
1	China	-9.73%
2	Viet Nam	202.9%
3	Sri Lanka	-1.05%
4	Indonesia	-19.49%
5	India	37.53%
6	Dominican Rep.	-8.58%
7	Thailand	-19.51%
8	Honduras	-6.92%
9	El Salvador	9.35%
10	Cambodia	-11.12%

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

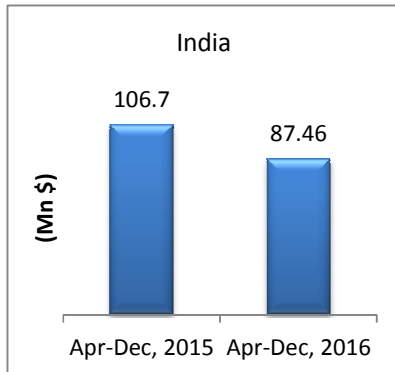


Rank	Country	% Change
1	Viet Nam	-4.32%
2	El Salvador	6.60%
3	India	-9.06%
4	Honduras	-4.13%
5	China	-16.21%
6	Bangladesh	-14.73%
7	Sri Lanka	-5.96%
8	Thailand	-15.16%
9	Cambodia	-19.28%
10	Dominican Rep.	-23.41%



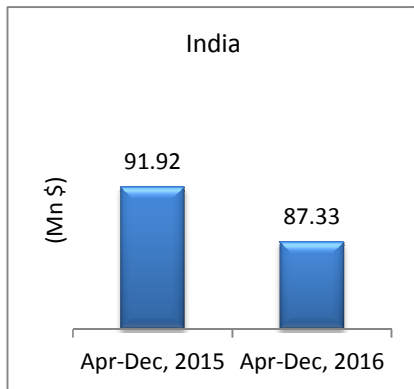
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13. Women's blouses, shirts of cotton, not knitted or crocheted, nesoi (6206303041)



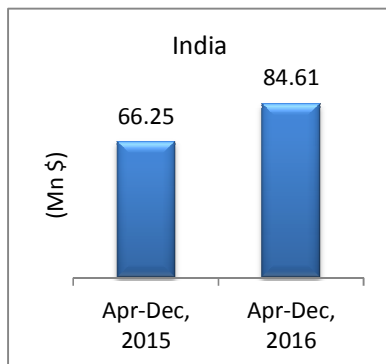
Rank	Country	% Change
1	China	-2.81%
2	India	-18.03%
3	Bangladesh	16.10%
4	Viet Nam	-3.98%
5	Indonesia	-14.75%
6	Italy	0.85%
7	Thailand	-36.40%
8	Madagascar	81.41%
9	Sri Lanka	-2.84%
10	Mexico	17.46%

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



Rank	Country	% Change
1	India	-5.00%
2	China	-4.48%
3	Indonesia	-9.51%
4	Sri Lanka	18.18%
5	Bangladesh	-11.61%
6	Viet Nam	-36.95%
7	Cambodia	-5.82%
8	El Salvador	29.90%
9	Italy	89.83%
10	Philippines	24.66%

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



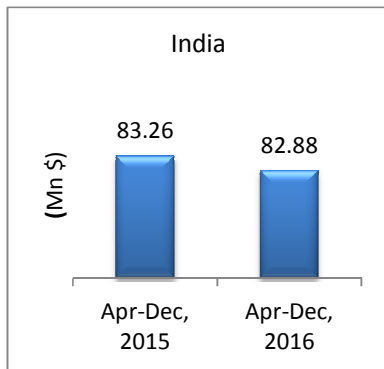
Rank	Country	% Change
1	China	18.37%
2	India	27.71%
3	Italy	3.77%
4	Viet Nam	105.5%
5	Indonesia	76.55%
6	France	-3.03%
7	Turkey	85.88%
8	Romania	25.07%
9	UK	12.19%
10	Cambodia	46.91%



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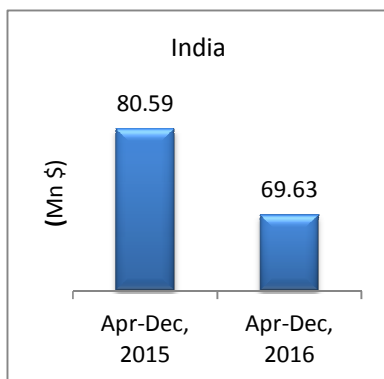
(April-December'2016)

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



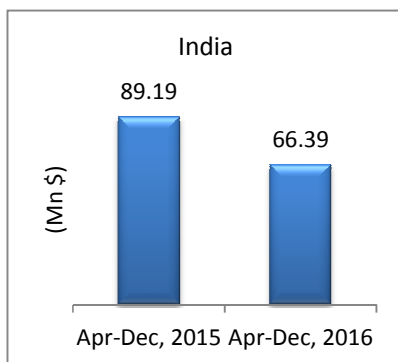
Rank	Country	% Change
1	India	-0.46%
2	China	-12.72%
3	Mexico	-3.86%
4	Turkey	-9.14%
5	Viet Nam	75.61%
6	Indonesia	-62.00%
7	Korea, Rep.	65.00%
8	Thailand	-69.76%
9	Netherlands	24.90%
10	Guatemala	93.83%

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	-1.44%
2	China	-4.93%
3	Viet Nam	16.45%
4	India	-13.60%
5	Mauritius	-24.28%
6	Sri Lanka	0.81%
7	Indonesia	-18.86%
8	Philippines	-21.60%
9	El Salvador	-24.86%
10	Malaysia	-48.49%

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

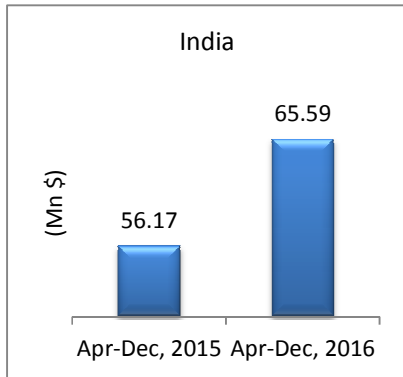


Rank	Country	% Change
1	India	-25.57%
2	China	22.13%
3	Pakistan	-21.50%
4	Bahrain	-2.69%
5	Israel	-2.25%
6	Thailand	-17.51%
7	Portugal	-20.40%
8	Italy	54.16%
9	France	-34.17%
10	Egypt	26.25%



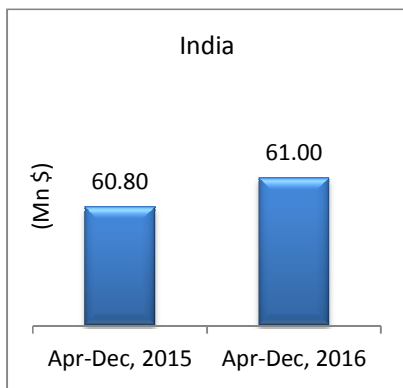
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19. Carpets and other textile floor coverings of other textile (5703900000)



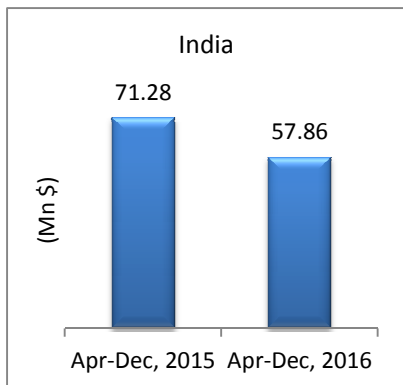
Rank	Country	% Change
1	India	↑ 16.76%
2	China	↓ -17.82%
3	Hong Kong	↑ 0.63%
4	Portugal	↑ 2.34%
5	Nepal	↑ 76.67%
6	Thailand	↑ 7.97%
7	Turkey	↑ 45.38%
8	Sweden	↓ -23.16%
9	Italy	↑ 26.32%
10	Netherlands	↓ -29.05%

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



Rank	Country	% Change
1	China	↓ -16.49%
2	Bangladesh	↑ 0.39%
3	Viet Nam	↑ 1.55%
4	India	↑ 0.32%
5	Indonesia	↓ -11.13%
6	Italy	↓ -15.97%
7	Mexico	↓ -14.76%
8	El Salvador	↑ 94.31%
9	Mauritius	↑ 45.08%
10	Turkey	↓ -3.50%

21. Women's briefs and panties, knitted or crocheted, of cotton (6108210010)



Rank	Country	% Change
1	Sri Lanka	↓ -5.87%
2	Thailand	↑ 3.26%
3	Bangladesh	↓ -14.29%
4	India	↓ -18.83%
5	Viet Nam	↓ -6.68%
6	China	↓ -6.59%
7	Mexico	↑ 19.75%
8	Honduras	↑ 4.20%
9	El Salvador	↑ 33.69%
10	Pakistan	↓ -33.65%