



US Market Watch (Apr-Mar, 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 \$113.27 billion during the period Apr-Mar, 2016-17 as compared to \$118.87 billion during the same period in 2015-16 registering a negative growth of 4.72%.

Tab-1:US import of T&C

Period	Import (\$ Bn)
2016	113.59
April-Mar,2015-16	118.87
April-Mar,2016-17	113.27
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-March, 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-Mar, 2016-17):

- US T&C imports from the rest of the world were \$ 113.27 billion in Apr-Mar, 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 \$ 98.41 billion (86.88%) during Apr-Mar, 2016-17 whereas imports in textiles items were worth \$ 14.86 billion (13.12%).



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- China was leading in textiles and clothing export in US market with \$ 40.95 billion contributing 36.16 percent during Apr-Mar, 2016-17.
- Vietnam was distant second with \$ 11.63 billion (10.26%) followed by India with \$ 7.98 billion (7.04%), Bangladesh \$ 5.47billion (4.83%) and Mexico \$ 5.28 billion (4.66%) during Apr-Mar, 2016-17.

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

Exporter	Apr-Mar, 2015-16	Apr-Mar, 2016-17	%Change
China	43.93	40.95	↓ -6.67
Viet Nam	11.41	11.63	↑ 1.93
India	8.60	7.98	↓ -1.06
Bangladesh	5.75	5.47	↓ -4.93
Mexico	5.32	5.28	↓ -0.83
RoW	44.40	53.21	↑ 19.85
World	118.87	104.84	↓ -4.72

Source: ITC

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

- India's T&C export to US during Apr-Mar, 2016-17 was \$ 7.98 billion as compared to \$ 8.60 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 1.06% over the same period of previous year.
- India's aggregate export of textiles to US (Chapter 50 to 60) was \$ 1.70 billion during Apr-Mar, 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 \$ 6.28 billion during Apr-Mar, 2016-17 which is 28 percent of India's total clothing exports to the world.
- Top 21 Products (whose share is more than 1%) contributed 47.49 percent to the export basket in US market during Apr-Mar, 2016-17.



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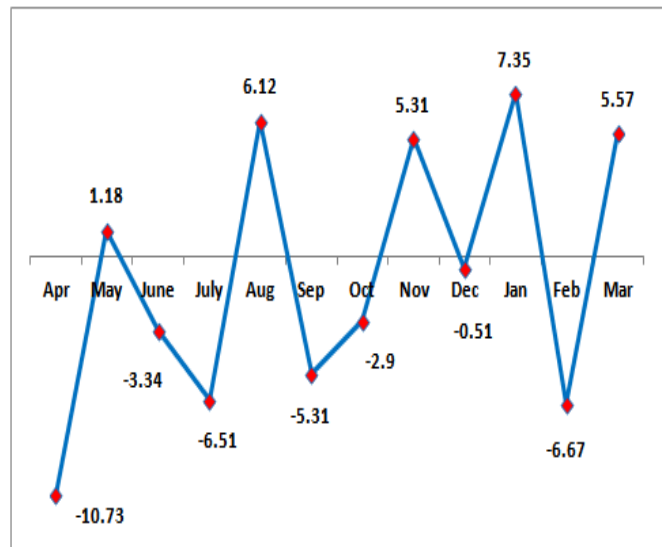
- The share of these top 21 products was 46.49 percent in the same period of 2015-16.

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

Month	April-March		
	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	624.7	-5.31
October	658.28	639.17	-2.9
November	585.35	616.41	5.31
December	570.92	567.98	-0.51
January	650.74	698.55	7.35
February	739	689.73	-6.67
March	761.078	803.43	5.57
Apr-Mar	8061.03	7975.93	-1.06

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-Mar, 2016-17)

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

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

Products	Descriptions	Apr-Mar' 2015-16	Apr-Mar' 2016-17	%change
6302600020	Toilet linen and kitchen linen, of terry toweling of cotton	655.9	692.3	5.55%
6302319020	Other bed linen, not printed/knit/napped, cotton sheets, not containing embroidery	597.8	610.1	2.05%
6110202069	Men's or boys' pullovers of cotton containing less than 36 percent by weight	216.1	220.7	2.14%
6110202079	Women's or girls' pullovers of cotton containing less than 36 percent by weight	190.9	192.7	0.96%
6206403030	Women's blouses, shirts of man-made fibers, not knitted	178.0	179.8	1.05%
6302319010	Other bed linen not printed, knitted, or napped, cotton, not containing embroidery	146.7	155.6	6.06%
6204444010	Women's dresses, of artificial fibers, not knitted, containing less than 36 percent by weight	102.0	129.6	27.00%
6212109020	Brassieres, not containing lace or net or embroidery, of man-made fibers, whether or not knitted	98.3	118.7	20.75%
6305320010	Sacks and bags, of a kind used for the packing of goods, of man-made textile materials: flexible	107.0	114.6	7.10%
6205202066	Men's shirts of cotton, not knitted or crocheted, nesoi	86.0	91.0	5.87%
5703900000	Carpets and other textile floor coverings of other textile	73.9	85.3	15.41%
Total		2452.6	2590.5	5.62%

Source: ITC



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

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

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

Products	Descriptions	Apr-Mar' 2015-16	Apr-Mar' 2016-17	%change
5703102000	Carpets and other textile floor coverings, tufted, whether or not made up: of wool	168.0	157.1	-6.44%
6105100010	Men's shirts, knitted or crocheted, of cotton	147.7	145.6	-1.44%
5701104000	Carpets and other textile floor coverings, of wool hand-hooked, tufts	153.4	140.8	-8.19%
6206303041	Women's blouses, shirts of cotton, not knitted or crocheted, nesoi	162.4	133.0	-18.10%
5407200000	Woven fabrics of synthetic filament yarn; obtained from strip or the like	139.2	132.8	-4.57%
6107110010	Men's underpants and briefs, knitted or crocheted, of cotton	127.8	117.4	-8.10%
6206303011	Women's blouses, shirts of cotton, with two or more colors in the warp	114.0	108.7	-4.69%
6205202051	Men's shirts of cotton, with two or more colors in the warp and/or the filling, not knitted	106.2	92.6	-12.80%
6302219020	Other bed linen: printed, not knit, cotton sheets, not napped, not containing embroidery	116.9	88.5	-24.27%
6109100012	Men's cotton other T-Shirts, knitted or crocheted	95.3	80.3	-15.79%
Total		1330.7	1196.7	-10.07%

Source: ITC

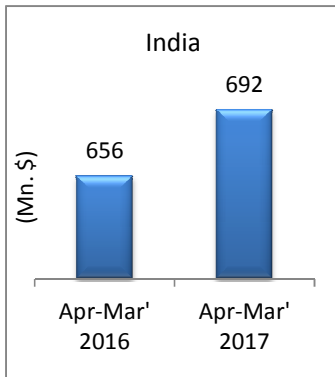


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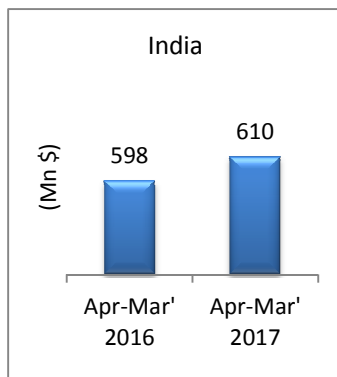
4.0 India's Product wise Performance vis-à-vis Competitors (Apr-Mar, 2016-17) over previous year

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



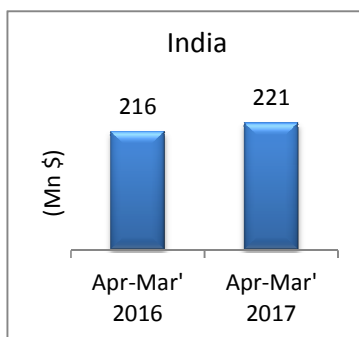
Rank	Country	%Change
1	India	5.55%
2	China	-4.86%
3	Pakistan	-1.89%
4	Turkey	13.20%
5	Bangladesh	-9.16%
6	Egypt	-10.46%
7	Colombia	-2.81%
8	Portugal	-2.39%
9	El Salvador	-27.53%
10	Canada	-16.72%

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



Rank	Country	%Change
1	India	2.05%
2	China	-15.51%
3	Pakistan	1.26%
4	Bahrain	5.03%
5	Portugal	-32.81%
6	Italy	6.37%
7	Egypt	12.84%
8	Cambodia	-24.94%
9	Hong Kong	-23.35%
10	Turkey	11.67%

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



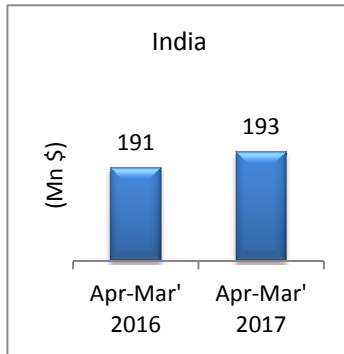
Rank	Country	%Change
1	China	-8.92%
2	Viet Nam	2.16%
3	Honduras	-9.88%
4	India	2.14%
5	Guatemala	-19.26%
6	Haiti	-27.65%
7	Bangladesh	-9.97%
8	Nicaragua	-14.56%
9	Indonesia	-19.01%
10	El Salvador	22.89%



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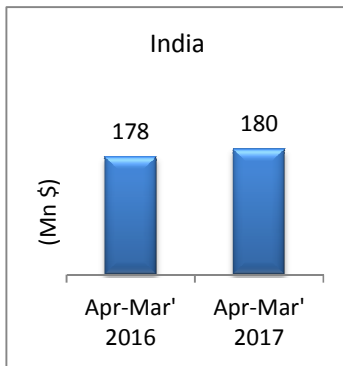
(April-March, 2016-17)

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



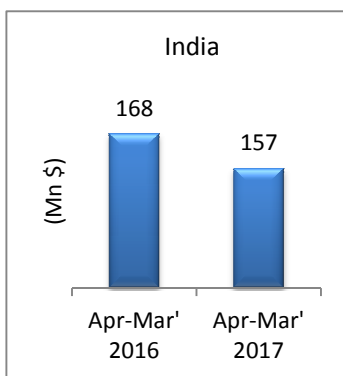
Rank	Country	%Change
1	China	-16.98%
2	Viet Nam	-4.53%
3	Indonesia	-15.31%
4	India	0.96%
5	Guatemala	-20.72%
6	Cambodia	-20.29%
7	Bangladesh	3.22%
8	Nicaragua	12.46%
9	Malaysia	-5.19%
10	Haiti	-13.78%

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



Rank	Country	%Change
1	China	0.46%
2	Indonesia	-6.28%
3	Viet Nam	13.50%
4	India	1.05%
5	Philippines	-3.68%
6	Bangladesh	62.48%
7	Mexico	85.09%
8	Italy	-1.49%
9	Egypt	-17.19%
10	Turkey	-12.90%

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



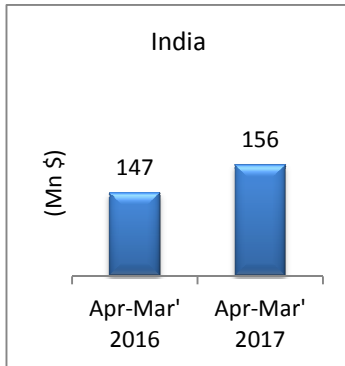
Rank	Country	%Change
1	India	-6.44%
2	China	-25.67%
3	Thailand	46.46%
4	Italy	115.54%
5	New Zealand	1.07%
6	Netherlands	10.43%
7	UK	311.36%
8	Hong Kong	-47.72%
9	Nepal	77.62%
10	Sweden	-2.88%



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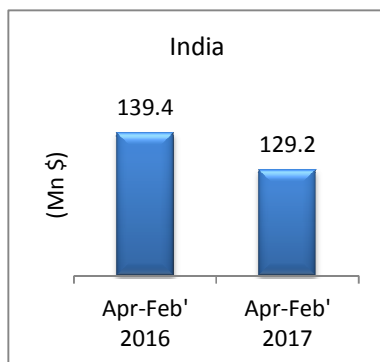
(April-March, 2016-17)

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



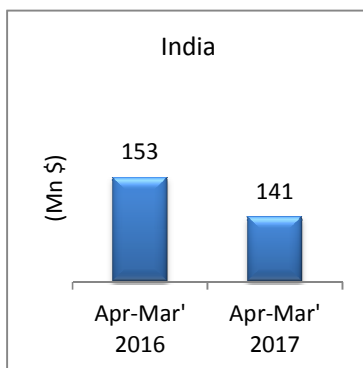
Rank	Country	%Change
1	India	6.06%
2	China	-9.25%
3	Pakistan	-1.69%
4	Bahrain	-8.44%
5	Italy	29.94%
6	Portugal	-26.72%
7	Egypt	-3.07%
8	Cambodia	-19.57%
9	Israel	133.13%
10	El Salvador	317.11%

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



Rank	Country	%Change
1	Viet Nam	5.95%
2	India	-1.44%
3	Indonesia	-10.06%
4	China	-28.10%
5	Pakistan	-14.28%
6	Peru	-12.61%
7	Bangladesh	-10.49%
8	Cambodia	-19.11%
9	Sri Lanka	-13.31%
10	Guatemala	18.89%

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



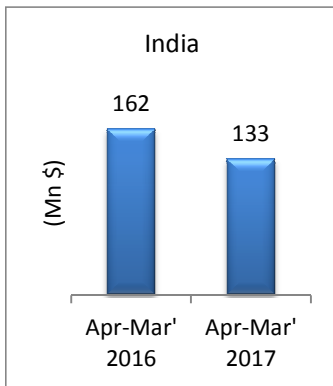
Rank	Country	%Change
1	India	-8.19%
2	Iran	459.66%
3	Pakistan	-21.87%
4	Nepal	10.99%
5	Turkey	-20.44%
6	Germany	8.22%
7	France	-28.87%
8	Morocco	-2.15%
9	China	-24.39%
10	Afghanistan	-3.26%



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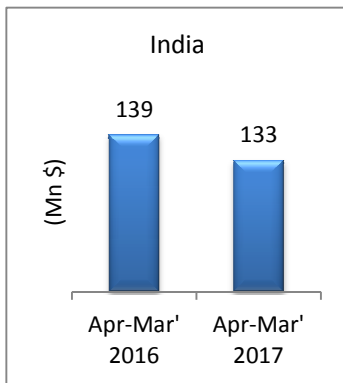
(April-March, 2016-17)

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



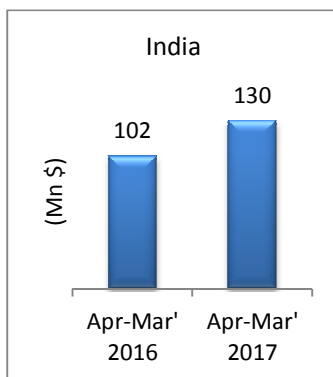
Rank	Country	%Change
1	China	-3.41%
2	India	-18.10%
3	Bangladesh	9.60%
4	Viet Nam	-4.24%
5	Indonesia	-15.81%
6	Italy	5.25%
7	Thailand	-35.47%
8	Turkey	62.82%
9	Sri Lanka	-12.19%
10	Mexico	14.49%

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



Rank	Country	%Change
1	India	-4.57%
2	China	26.88%
3	UAE	-39.21%
4	Viet Nam	-2.72%
5	Saudi Arabia	-11.61%
6	Netherlands	-6.86%
7	Turkey	-35.93%
8	Canada	9.29%
9	Greece	-17.61%
10	UK	15.21%

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



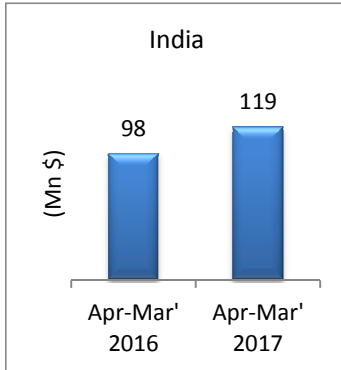
Rank	Country	%Change
1	China	9.35%
2	India	27.00%
3	Indonesia	50.86%
4	Italy	-1.42%
5	Cambodia	79.76%
6	Viet Nam	67.75%
7	Turkey	88.03%
8	Morocco	-27.35%
9	France	-2.50%
10	Bangladesh	45.51%



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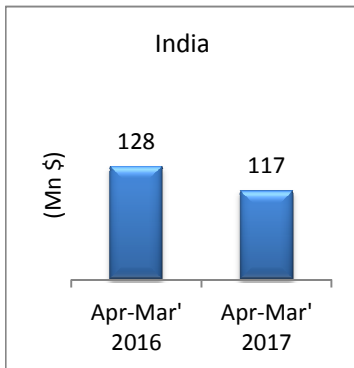
(April-March, 2016-17)

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



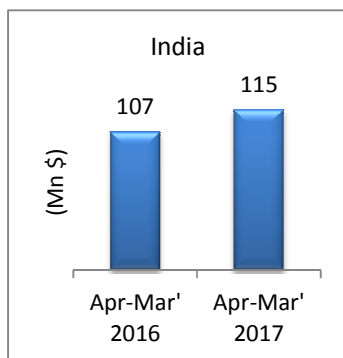
Rank	Country	%Change
1	China	-10.16%
2	Viet Nam	224.10%
3	Sri Lanka	-2.04%
4	Indonesia	-14.90%
5	India	20.75%
6	Dominican Rep.	-5.39%
7	Honduras	-10.09%
8	Thailand	-17.67%
9	El Salvador	11.18%
10	Bangladesh	12.08%

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



Rank	Country	%Change
1	Viet Nam	-7.39%
2	El Salvador	0.65%
3	India	-8.10%
4	Honduras	4.50%
5	China	-16.68%
6	Bangladesh	-7.26%
7	Sri Lanka	-14.34%
8	Dominican Rep.	-15.05%
9	Kenya	2235%
10	Cambodia	-18.41%

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



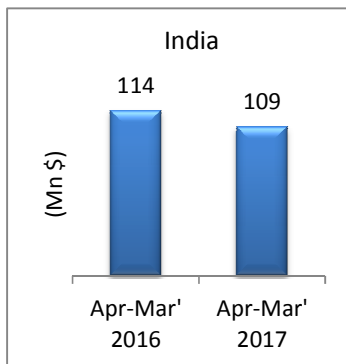
Rank	Country	%Change
1	India	7.10%
2	China	-8.58%
3	Mexico	-1.52%
4	Turkey	-2.39%
5	Viet Nam	79.15%
6	Indonesia	-57.78%
7	France	-1.43%
8	Korea, Rep.	7290%
9	Greece	19.11%
10	Thailand	-68.55%



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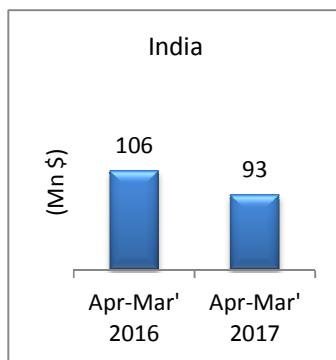
(April-March, 2016-17)

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



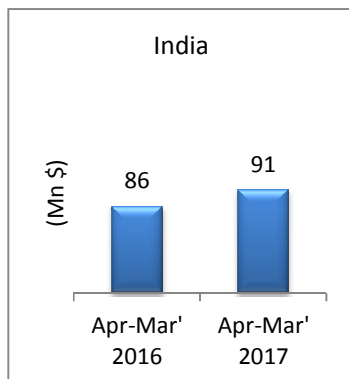
Rank	Country	%Change
1	China	-10.38%
2	India	-4.69%
3	Indonesia	-7.84%
4	Viet Nam	-31.30%
5	Bangladesh	-21.04%
6	Sri Lanka	21.54%
7	Thailand	-8.04%
8	El Salvador	22.88%
9	Cambodia	-2.16%
10	Morocco	92.84%

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	China	-6.85%
2	Bangladesh	-7.96%
3	Viet Nam	13.03%
4	Mauritius	-28.15%
5	India	-12.80%
6	Sri Lanka	2.79%
7	Indonesia	-15.62%
8	El Salvador	-23.02%
9	Philippines	-23.49%
10	Malaysia	-40.54%

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



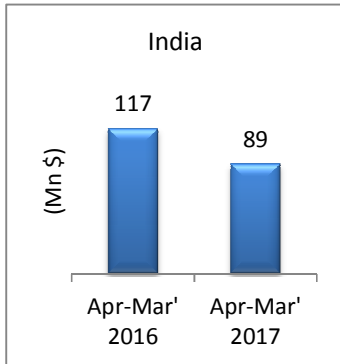
Rank	Country	%Change
1	China	-15.68%
2	Bangladesh	3.31%
3	India	5.87%
4	Viet Nam	0.99%
5	Indonesia	2.20%
6	Italy	-15.67%
7	Mexico	-12.95%
8	Mauritius	14.76%
9	Sri Lanka	-31.27%
10	Dominican Rep.	-3.09%



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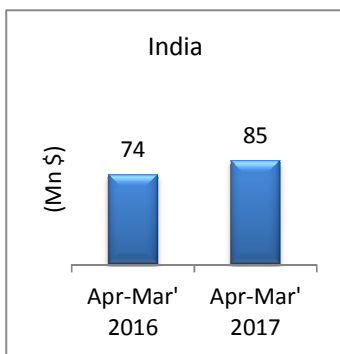
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19. Other bed linen: printed, not knit, cotton sheets, not napped, not containing embroidery (6302219020)



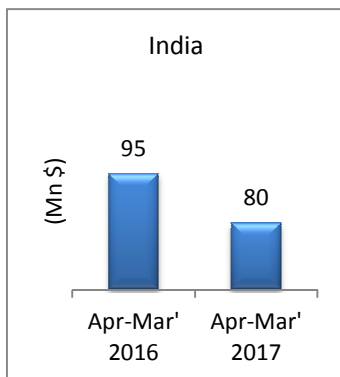
Rank	Country	%Change
1	India	-24.27%
2	China	13.78%
3	Pakistan	-21.17%
4	Bahrain	-11.18%
5	Israel	1.76%
6	Mexico	51.58%
7	Portugal	-22.97%
8	Thailand	-5.44%
9	France	-32.56%
10	Italy	60.43%

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



Rank	Country	%Change
1	India	15.41%
2	China	-12.63%
3	Portugal	10.76%
4	Hong Kong	-9.20%
5	Egypt	-100.0%
6	Turkey	194.9%
7	Sweden	-11.48%
8	Thailand	6.42%
9	Pakistan	-53.69%
10	Taipei, Chinese	-89.02%

21. Men's cotton other T-Shirts, knitted or crocheted (6109100012)



Rank	Country	%Change
1	Honduras	4.43%
2	Mexico	-15.18%
3	Nicaragua	5.93%
4	El Salvador	12.35%
5	Haiti	-13.56%
6	China	-13.33%
7	India	-15.79%
8	Bangladesh	-5.94%
9	Dominican Rep.	3.20%
10	Pakistan	3.38%