

Discussion Paper 1

***Export Competiveness of Cotton Yarn HS 520511:
(CARDED, >85%, <8.27)***



***P Nayak
T.K. Rout
Deepti Lahane***

DR P. NAYAK

Secretary
Textiles Committee
Mumbai - 400 025

Preface

The Textiles Committee has been providing valuable databases on different facts of T&C industry to the industry stakeholders and policy makers for deriving well informed policy decision & business strategy. Due to the onslaught of RTA, FTA & Multilateral Trade Agreements under the framework of WTO, the competition among the textile exporting countries has also been growing giving rise to challenges in the form of price and quality competitiveness. To deal with the situation successfully countries, may requires comprehensive product wise database on production, export, import, cost competitiveness etc.

In order to support the trade & industry through analysis and dissemination, the Textiles committee is preparing a comprehensive database on the different facets of the textiles sector like production, demand, exports, cost of production, tariffs etc. , through Market Intelligence in Textiles (MIT).

This discussion paper “Export Competiveness of Cotton Yarn HS 520511: (Carded, >85%, <8.27)” attempts to delineate the global players in this product through their global exports, imports vis-e-vis India. Efforts are made to present the information in user friendly format. I hope this paper will be useful to the readers and help in understanding the international trade in Cotton Yarn (HS 520511) in a better way. The valued suggestions and comments from the readers are welcome.

I appreciate the efforts put in by Shri T.K Rout, Deputy Director, Ms Deepti Lahane, Research Associate and the team of researcher who have been instrumental to bring out this data base series.

Place: Mumbai

(Dr. P. Nayak)

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Table 1.1-Analysis for Importance of 520511 in Cotton Yarn Basket and India's position: 2012

| Top 10 CY importers | Total CY Import Value (Mn USD) | Total Import of 520511 (Mn USD) | % Share of 520511 in Product Basket | Average Imports (2010-2013) (Mn USD) | CAGR (2004-2012) for World Import of 520511 | India's exports to trade partners in 520511 | India's % Share in total Imports of 520511 | CAGR (2004-2012) for Indian Imports |
|---------------------|--------------------------------|---------------------------------|---|--------------------------------------|---|---|--|-------------------------------------|
| China | 4952.82 | 400.75 (51.30) | 8.09 | 343.63 | 19.49% | 10.68 | 2.66 | 28.44% |
| Hong Kong | 1511.08 | 75.78 (9.70) | 5.01 | 66.75 | 3.05% | 1.87 | 2.47 | 3.23% |
| European Union | 1116.23 | 31.39 (4.02) | 2.81 | 42.1 | -1.06% | 5.7 | 18.14 | 35.93% |
| Korea Republic | 584.53 | 4.17 (0.53) | 0.71 | 5.9 | 12.96% | 0.22 | 5.25 | -12.86% |
| Turkey | 344.73 | 11.75 (1.50) | 3.41 | 7.59 | -1.82% | 0.31 | 2.68 | -2.11% |
| Russia | 288.75 | 7.51 (0.96) | 2.6 | 6.6 | 25.75% | 0.08 | 1.1 | NA |
| Japan | 271.39 | 4.77 (0.61) | 1.76 | 3.72 | -5.33% | 0.13 | 2.83 | NA |
| Germany | 248.67 | 15.79 (2.02) | 6.35 | 21.42 | -4.52% | 0.12 | 0.74 | NA |
| Egypt | 238.27 | 38.05 (4.87) | 15.97 | 47.27 | -13.20% | 19.86 | 52.19 | -3.43% |
| Guatemala | 212.84 | 0.29 (0.04) | 0.13 | 0.51 | 33.04% | 0.16 | 54.56 | NA |
| Portugal | 211.41 | 3.98 (0.51) | 1.88 | 3.69 | -6.23% | 0.49 | 12.38 | NA |
| US | 164.79 | 4.16 (0.53) | 2.52 | 5.8 | -12.86% | 0.14 | 3.45 | NA |
| El Salvador | 151.82 | 9.11 (1.17) | 6 | 5.96 | 1.59% | 0.14 | 1.53 | NA |
| Mexico | 148.85 | 6.15 (0.79) | 4.13 | 8.64 | 12.98% | 0 | 0 | NA |
| Sri Lanka | 127.44 | 11.90 (1.52) | 9.34 | 16.56 | -11.46% | 2.59 | 21.77 | -18.89% |
| Malaysia | 126.62 | 25.11 (3.21) | 19.83 | 34.06 | -4.06% | 3.92 | 15.59 | -10.42% |
| Spain | 114.01 | 8.30 (1.06) | 7.28 | 10.04 | -2.88% | 2.5 | 30.09 | 38.47% |
| Czech Republic | 112.05 | 2.53 (0.32) | 2.25 | 3.16 | 1.38% | 0.09 | 3.5 | NA |
| France | 100.25 | 4.00 (0.51) | 3.99 | 4.88 | -3.83% | 0.12 | 3.04 | NA |
| World Total | 11970.47 | 781.17 | 520511 contribute 6.53% of total CY imports across the globe. | | | | | |

| Table 1.2- % share of top exporters in total export of 520511 in the world | | |
|---|---------------------------|--|
| Exporting Country | Trade Value Mn USD | % share in total world import of 520511 |
| Pakistan | 313.07 | 40.10% |
| China | 108.85 | 13.94% |
| United States | 84.70 | 10.85% |
| India | 63.08 | 8.08% |
| Other Asia, nes | 32.95 | 4.22% |
| Vietnam | 31.87 | 4.08% |
| Thailand | 21.07 | 2.70% |
| Turkmenistan | 19.49 | 2.50% |
| Spain | 17.13 | 2.19% |
| Turkey | 15.83 | 2.03% |
| Italy | 11.10 | 1.42% |
| Hong Kong, China | 10.76 | 1.38% |
| Indonesia | 9.27 | 1.19% |
| Rest of the world | 41.62 | 5.33% |
| World total import | 780.81 | 100.00% |

Figure (a)-Graphical representation of top exporters 520511 with their market share

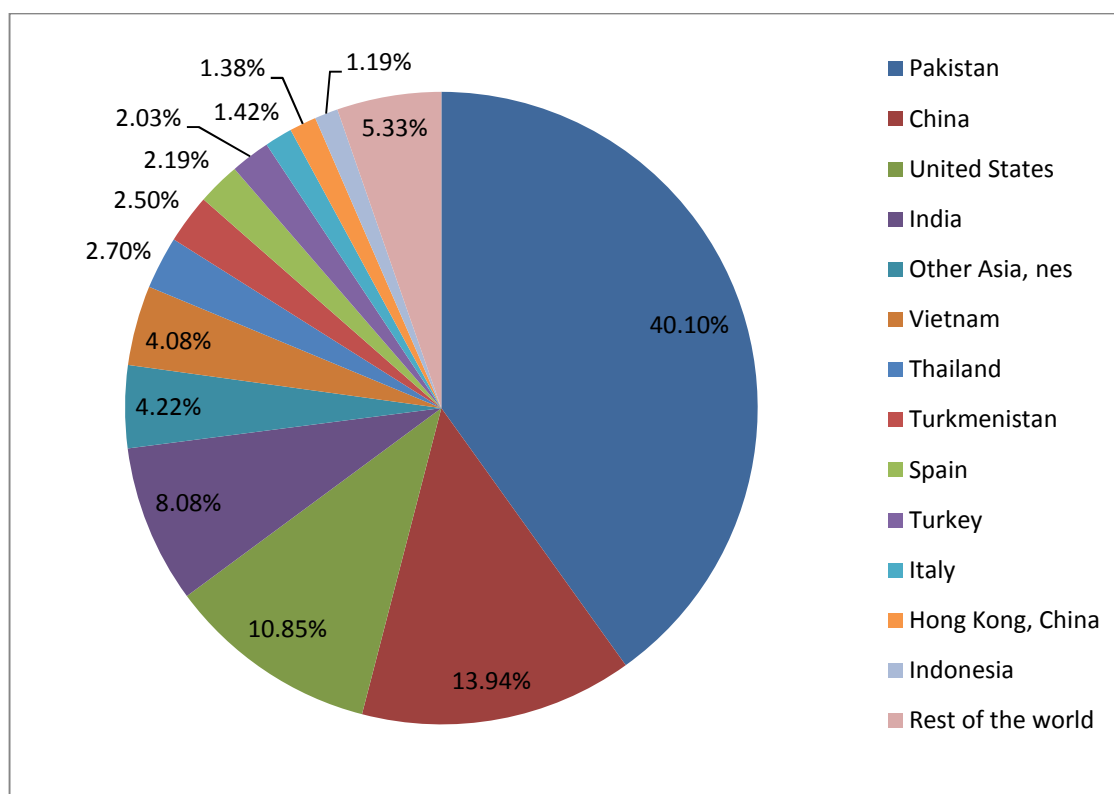


Table 1.3-Market share of India and Its Competitors in the top import markets of cotton yarn in the world 2012

| Top 10 Cotton Yarn (CY) importers | Total Import Value (Mn USD) | Major Competitors in export destinations with their Market Share | India's % share |
|--|------------------------------------|---|------------------------|
| China | 400.75 | Pakistan (67.35), Other Asia(6.56), Vietnam(6.11), Thailand(4.80) | 2.66 |
| Hong Kong | 75.78 | China(57.44), Pakistan(31.57), Other Asia(8.02) | 2.47 |
| European Union | 31.39 | Turkey (45.87), Pakistan (14.74), Bosnia and Herzegovina (9.24%) | 18.14 |
| Korea Republic | 4.17 | Vietnam(57.43), Indonesia(16.66), China(10.07), Pakistan(4.95) | 5.25 |
| Turkey | 11.75 | Turkmenistan(87.94), Pakistan(3.32) | 2.68 |
| Russian Federation | 7.51 | Turkmenistan(55.24), Uzbekistan(33.54), Turkey(3.35), Korea(2.46), Pakistan(1.97) | 1.10 |
| Japan | 4.77 | Indonesia(66.21), Pakistan(16.49), Thailand (12.72) | 2.83 |
| Germany | 15.79 | Spain(46.64), Italy(32.46), Turkey(10.22), Czech Republic(5.27) | 0.74 |
| Egypt | 38.05 | Syrian Arab Republic(19.41), Indonesia(8.25), China(6.83), Turkey(4.54), UAE(2.33) | 52.19 |
| Guatemala | 0.29 | China(27.11), Honduras(12.67), El Salvador(5.62) | 54.56 |
| Portugal | 3.98 | Spain(39.28), Pakistan(19.37), Turkmenistan(8.06) | 12.38 |
| United States | 4.16 | Pakistan(47.86), Mexico(41.02), Canada(3.62) | 3.45 |
| El Salvador | 9.11 | United States(94.62), Indonesia(3.81) | 1.53 |
| Mexico | 6.15 | United States(97.68), El Salvador(1.24) | 0.00 |
| Sri Lanka | 11.90 | China(53.43), Pakistan(10.54), Hong Kong(3.71), Indonesia(3.30) | 21.77 |
| Malaysia | 25.11 | China(43.02), Pakistan(27.03), Vietnam(6.82), Thailand(3.43) | 15.59 |
| Spain | 8.30 | Turkey(25.97), Italy(15.37), Pakistan(13.40) | 30.09 |
| Czech Republic | 2.53 | Spain(57.27), Germany(21.68), Turkey(14.39) | 3.50 |
| France | 4.00 | Belgium(45.82), Spain(13.92), Turkey(11.18), Italy(9.17), Poland(5.68), Czech Republic(4.70), Germany(3.73) | 3.04 |

Note: The figures in parenthesis are percentage contributions to the total imports of a particular country

Table 1.4-UVR of India and Its Competitors: 2012

| Top 10 Cotton Yarn (CY) importers | Major Competitors in export destinations with their UVR |
|--|---|
| China | Pakistan (2.70), Other Asia (2.01), Vietnam (3.08), Thailand(3.08), India(2.19) |
| Hong Kong | China(2.51), Pakistan(2.75), Other Asia(2.63), India(2.25) |
| European Union | Turkey(2.72), Pakistan(5.25), Bosnia and Herzegovina (4.02), India(2.71) |
| Korea Republic | Vietnam(1.59), Indonesia(1.72), China(6.39), Pakistan(3.27), India(2.30) |
| Turkey | Turkmenistan(2.16), Pakistan(3.77), India(3.01) |
| Russian Federation | Turkmenistan(2.04), Uzbekistan(1.90), Turkey(2.46), Korea(2.60), Pakistan(2.55), India(2.30) |
| Japan | Indonesia(3.45), Pakistan(2.88), Thailand(3.44), India(2.71) |
| Germany | Spain(2.51), Italy(3.05), Turkey (2.24), Czech Republic(4.80), India(2.69) |
| Egypt | All Competitors (3.84) |
| Guatemala | China(2.63), Honduras(4.58), El Salvador(1.19), India(3.05) |
| Portugal | Spain(2.59), Pakistan(4.31), Turkmenistan(2.52), India(2.88) |

Top 10 Cotton Yarn (CY) importers Major Competitors in export destinations with their UVR

| | |
|----------------|--|
| United States | Pakistan(3.60), Mexico(3.29), Canada(12.43), India(3.47) |
| El Salvador | United States(2.79), Indonesia(1.88), India(2.37) |
| Mexico | United States(2.82), El Salvador(1.21) |
| Sri Lanka | China(6.80), Hong Kong(4.80), Indonesia(3.13), Pakistan(4.76), India(5.79) |
| Malaysia | China(4.72), Pakistan(3.45), Vietnam(3.22), Thailand(3.75), India(2.65) |
| Spain | Turkey(2.52), Italy(2.67), Pakistan(4.14), India(2.45) |
| Czech Republic | Spain(2.43), Germany(4.27), Turkey(3.47), |
| France | Belgium(3.12), Spain (3.00), Turkey(3.67), Italy(3.50), Poland (3.67), Czech Republic (3.01), Germany (3.41), India (3.28) |

Table 1.5- RCA of India and Its Competitors 2012 (520511)

| Country | RCA (W) | Analysis |
|------------------|---------|----------|
| China | 0.87 | RCD |
| Hong Kong, China | 1.36 | RCA |
| India | 6.50 | RCA |
| Indonesia | 0.09 | RCD |
| Korea, Rep. | 0.04 | RCD |
| Other Asia, nes | 2.93 | RCA |
| Pakistan | 4.80 | RCA |
| Thailand | 3.76 | RCA |
| Turkmenistan | 3.47 | RCA |
| Turkey | 0.63 | RCD |
| United States | 0.70 | RCD |
| Vietnam | 2.24 | RCA |

Table 1.6- Prospective Markets of India (520511)

| Import Market | Import Quantity from world |
|-----------------|----------------------------|
| Mexico | 6.14 Mn |
| Argentina | 0.93 Mn |
| Slovak Republic | 5.73 Mn |
| Austria | 1.20 Mn |

The above markets are open to India for exports of 520511. However, whether India will be able to export to these countries or not is a matter of concern. As far as, Slovak Republic and Austria are concerned, India can export to these regions as tariff applicable is same as that for other European Union nations. Mexico and Argentina have very high tariff rates for imports from India.

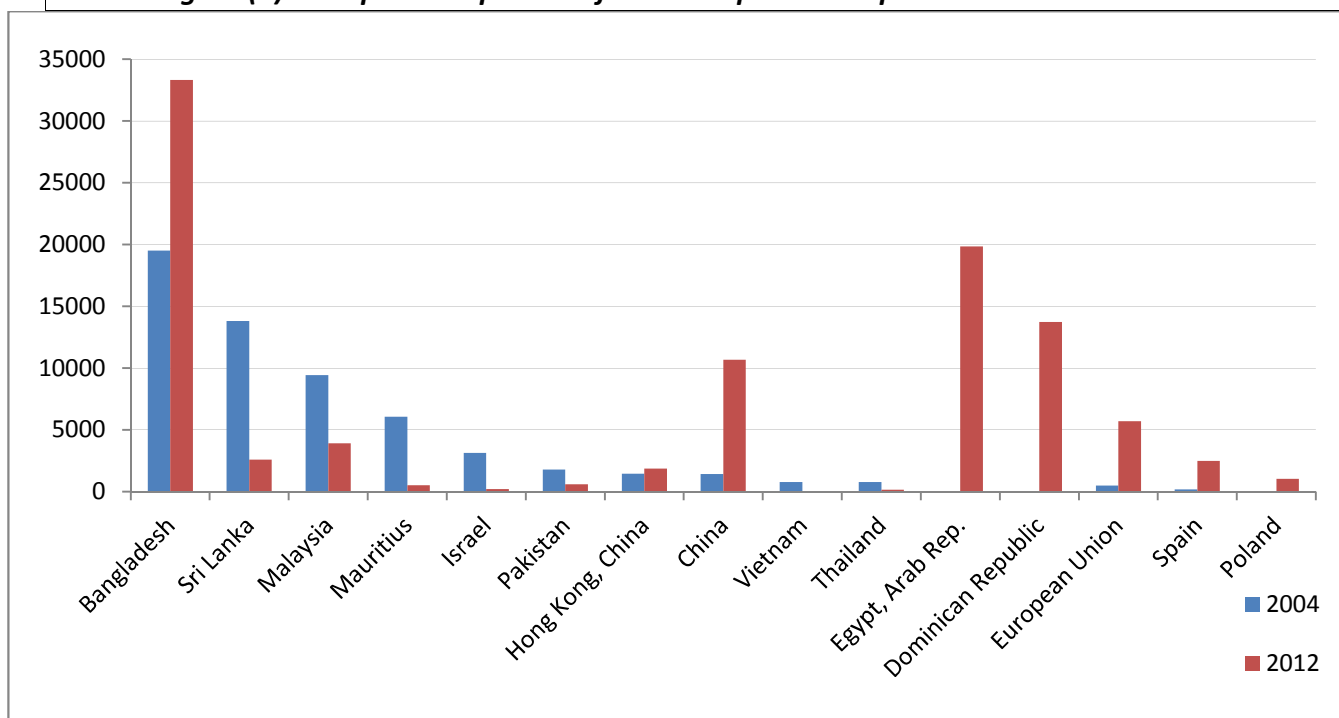
India's Trade in Uncombed Cotton Yarn (520511)

| Reporter Name | Trade Value in 1000 USD | Quantity |
|----------------------|--------------------------------|-----------------|
| Bangladesh | 19518.325 | 7158363 |
| Sri Lanka | 13823.477 | 4710272 |
| Malaysia | 9439.128 | 3614855 |
| Mauritius | 6079.261 | 2514631 |
| Israel | 3134 | 1481155 |
| Pakistan | 1797.938 | 833250 |
| Hong Kong, China | 1449.1 | 895143 |
| China | 1441.769 | 1035989 |
| Vietnam | 792.782 | 337961 |
| Thailand | 774.339 | 326955 |
| ROW | 2936.506 | 1319240 |

- In 2004, the major destinations for Indian exports of Product 520511 were Bangladesh, Sri Lanka, Malaysia, Mauritius, Israel, Pakistan, Hong Kong, China, Vietnam and Thailand. But, over the last 9 years from 2004-2012 the export destinations have undergone a reform and the current top export destinations include Egypt, Arab Rep, Dominican Republic, China, European Union, Malaysia, Sri Lanka, Spain, Hong Kong, China, Poland and Pakistan.
- Since, Bangladesh import figures are not available we have estimated them by India's exports to Bangladesh in 520511 which amount to 33310 (1000 USD) in 2012. By that figure, Bangladesh is the top most import partner for India in 520511.

| Reporter Name | Trade Value in 1000 USD | Quantity |
|----------------------|--------------------------------|-----------------|
| Egypt, Arab Rep. | 19856.081 | 5164156 |
| Dominican Republic | 13734.664 | NA |
| China | 10676.403 | 4876643 |
| European Union | 5695.478 | 2105368 |
| Malaysia | 3915.311 | 1476791 |
| Sri Lanka | 2590.472 | 447709 |
| Spain | 2498.409 | 1020083 |
| Hong Kong, China | 1869.122 | 828887 |
| Poland | 1029.101 | 443770 |
| Pakistan | 608.642 | 156938 |
| ROW | 6298.83 | 4654972 |

Figure (b)- Comparative picture of India's top 10 trade partners in 2004 and 2012



In 2004, the total import from India in the world amounted to 60.70 Mn USD for a quantity of 24.10 Mn Kg. While in 2012, the total import from India in the world was 63.08 Mn USD for a quantity of 19.06 Mn Kg.

Figure(c)- Top ten export destination pattern of growth in imports: Comparison 2004, 2008 & 2012

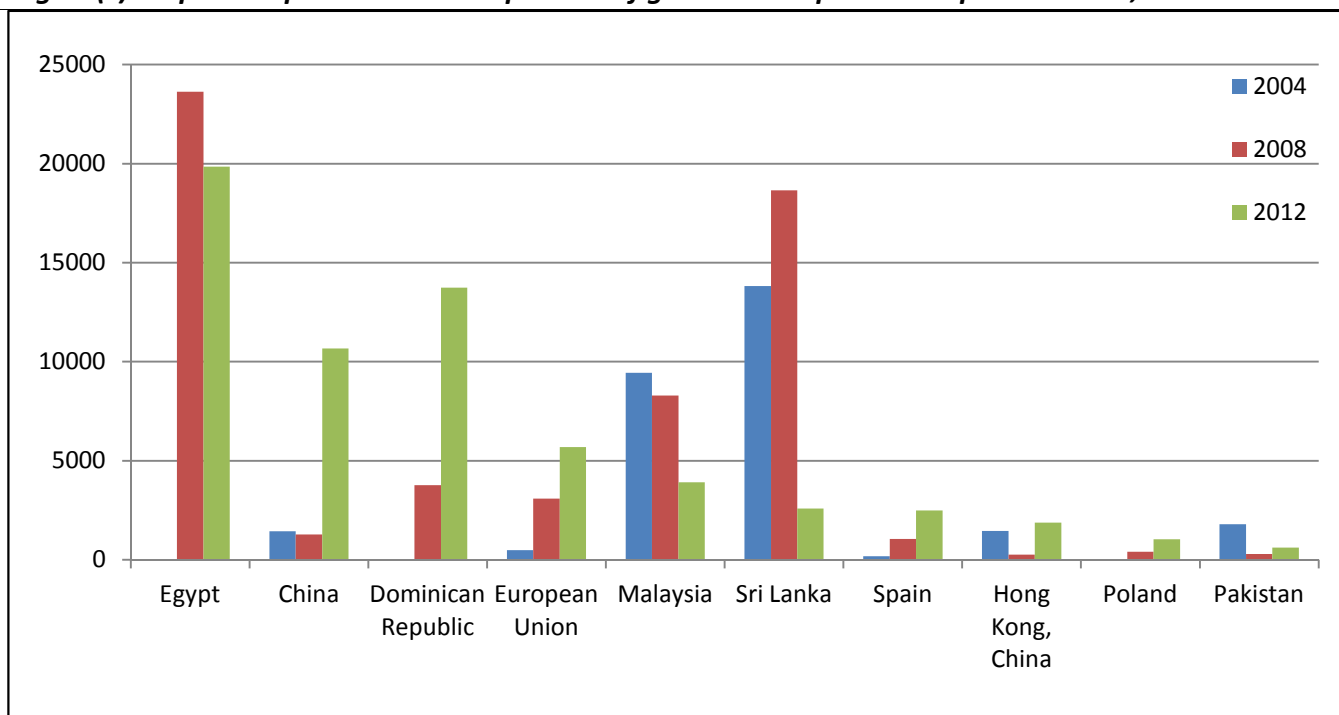


Figure (d)-Comparative Picture of India's Top 10 Trade Partners in 2004 and 2012

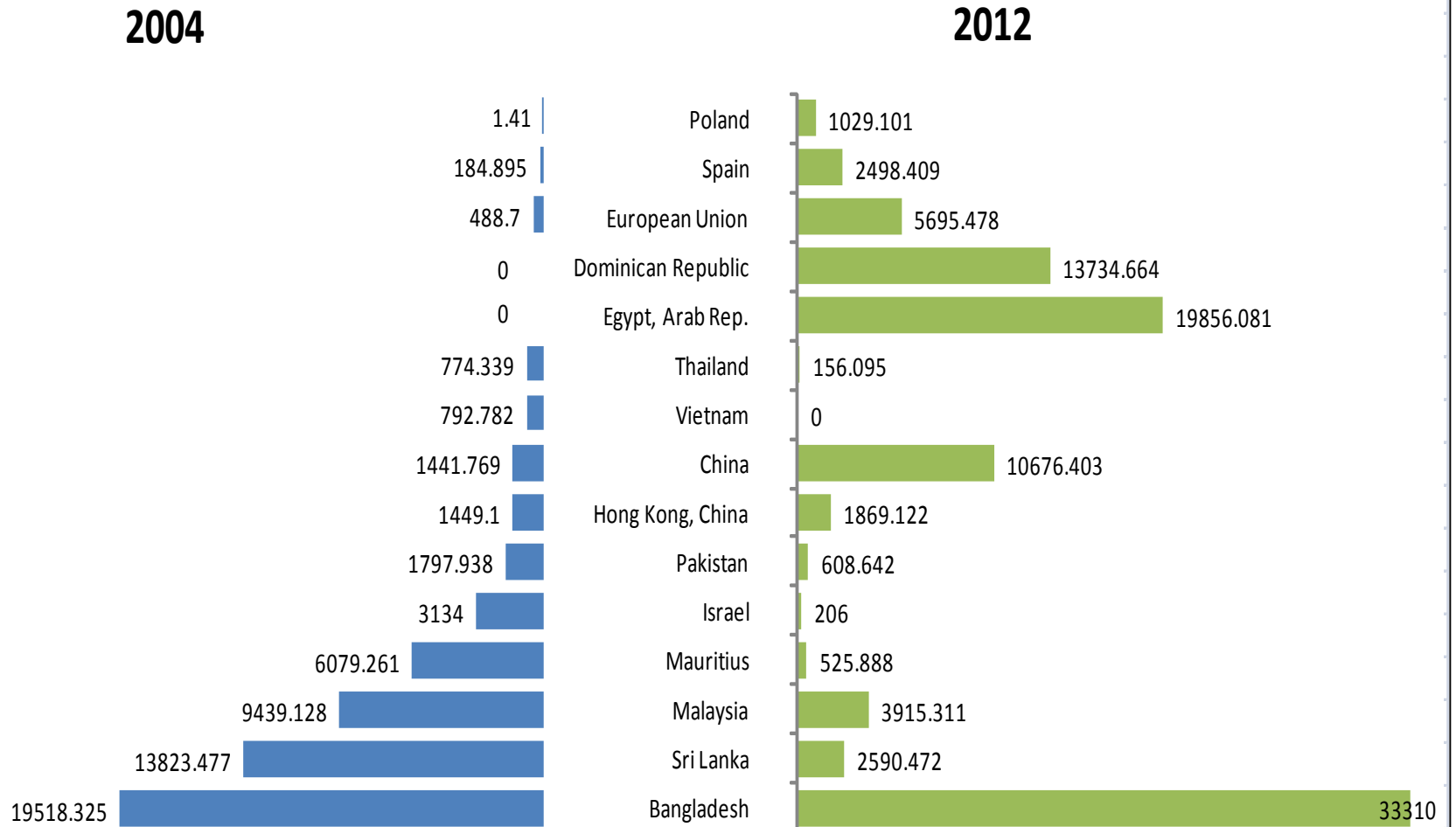


Table 1.9- India's trade partners and partner change continent wise 2004 and 2012

| Continent | Major Countries 2004 | 2004 (Mn USD) | CAGR | Major Countries 2012 | 2012 (Mn USD) | CAGR |
|----------------------|----------------------|---------------|---------|----------------------|---------------|---------|
| ASIA | Bangladesh | 19.52 | 6.91% | Bangladesh | 33.31 | 6.91% |
| | Sri Lanka | 13.82 | -18.89% | China | 10.67 | 28.44% |
| | Malaysia | 9.44 | -10.42% | Malaysia | 3.91 | -10.42% |
| | Israel | 3.13 | -28.84% | Sri Lanka | 2.59 | -18.89% |
| | Pakistan | 1.80 | -12.66% | Hong Kong | 1.86 | 3.23% |
| | ROC | 5.65 | - | ROC | 1.96 | - |
| AFRICA | Mauritius | 6.08 | -26.36% | Egypt | 19.85 | -4.26% |
| | ROC | 0.22 | - | Mauritius | 0.52 | -26.36% |
| | | | | South Africa | 0.27 | 24.38% |
| | | | | Algeria | 0.19 | NA |
| | | | | ROC | 0.21 | - |
| EUROPE | European Union | 0.49 | 35.93% | European Union | 5.69 | 35.93% |
| | Tunisia | 0.31 | NA | Spain | 2.49 | 38.47% |
| | Italy | 0.28 | NA | Poland | 1.03 | 127.98% |
| | ROC | 0.23 | - | Portugal | 0.49 | 18.64% |
| | | | | United Kingdom | 0.34 | 46.47% |
| | | | ROC | 1.02 | - | |
| NORTH AMERICA | Canada | 0.07 | -67.10% | Dominican Republic | 13.73 | 64.91% |
| | ROC | 0.00 | - | Guatemala | 0.15 | -16.80% |
| | | | | United States | 0.14 | -5.64% |
| | | | | El Salvador | 0.14 | 166.19% |
| | | | | ROC | 0.01 | - |
| SOUTH AMERICA | Columbia | 0.16 | 8.29% | Peru | 0.60 | 33.08% |
| | ROC | 0.00 | - | Chile | 0.54 | 62.98% |
| | | | | Columbia | 0.30 | 8.29% |
| | | | | ROC | 0.10 | |
| | | | | | | |
| OCEANIA | ROC | 0.00 | - | Australia | 0.07 | -2.16% |
| | | | | ROC | 0.00 | - |

Table 1.10- Top 10 Export Markets for India and its position vis a vis competitors

| Egypt | China | Dominican Republic | European Union | Malaysia | Sri Lanka | Spain | Hong Kong | Poland | Pakistan |
|----------------------|------------------|---------------------------|------------------------|------------------|------------------|--------------|------------------|----------------|----------------------|
| India | Pakistan | United States | India | India | India | India | India | India | India |
| Syrian Arab Republic | China | India | United Arab Emirates | Canada | China | Belgium | Bulgaria | Belgium | United Arab Emirates |
| Indonesia | Other Asia | Pakistan | Argentina | China | Germany | China | China | China | Bangladesh |
| China | Vietnam | Unspecified | Bosnia and Herzegovina | Germany | Hong Kong, China | Germany | Germany | Czech Republic | China |
| Turkey | Thailand | Guatemala | Switzerland | Hong Kong, China | Indonesia | France | United Kingdom | Germany | Denmark |
| United Arab Emirates | India | Indonesia | China | Indonesia | Korea, Rep. | Italy | Italy | Spain | United Kingdom |
| Malaysia | Hong Kong, China | Sri Lanka | Egypt, Arab Rep. | Japan | Macao | Nigeria | Japan | United Kingdom | Indonesia |
| Germany | Turkmenistan | Honduras | Hong Kong, China | Korea, Rep. | Other Asia | Pakistan | Other Asia | Hungary | Turkmenistan |
| Italy | Italy | Vietnam | Croatia | Other Asia | Pakistan | Portugal | Pakistan | Italy | Turkey |
| Pakistan | Malaysia | China | Indonesia | Pakistan | Thailand | Slovenia | Peru | Japan | South Africa |
| United States | South Africa | Turkey | Japan | Thailand | Vietnam | Tunisia | Thailand | Nigeria | |
| Thailand | Japan | El Salvador | Nigeria | United States | | Turkey | | Netherlands | |
| Other Asia | Belgium | Israel | Pakistan | Vietnam | | South Africa | | Pakistan | |
| Vietnam | Bangladesh | Mexico | Russian Federation | | | | | Portugal | |
| Austria | Korea, Rep. | Spain | Saudi Arabia | | | | | Turkmenistan | |
| Hong Kong, China | Slovenia | | Syrian Arab Republic | | | | | Turkey | |
| Slovenia | | | Thailand | | | | | | |
| Greece | | | Turkmenistan | | | | | | |
| United Kingdom | | | Tunisia | | | | | | |
| Hungary | | | Turkey | | | | | | |
| Jordan | | | United States | | | | | | |
| Philippines | | | South Africa | | | | | | |

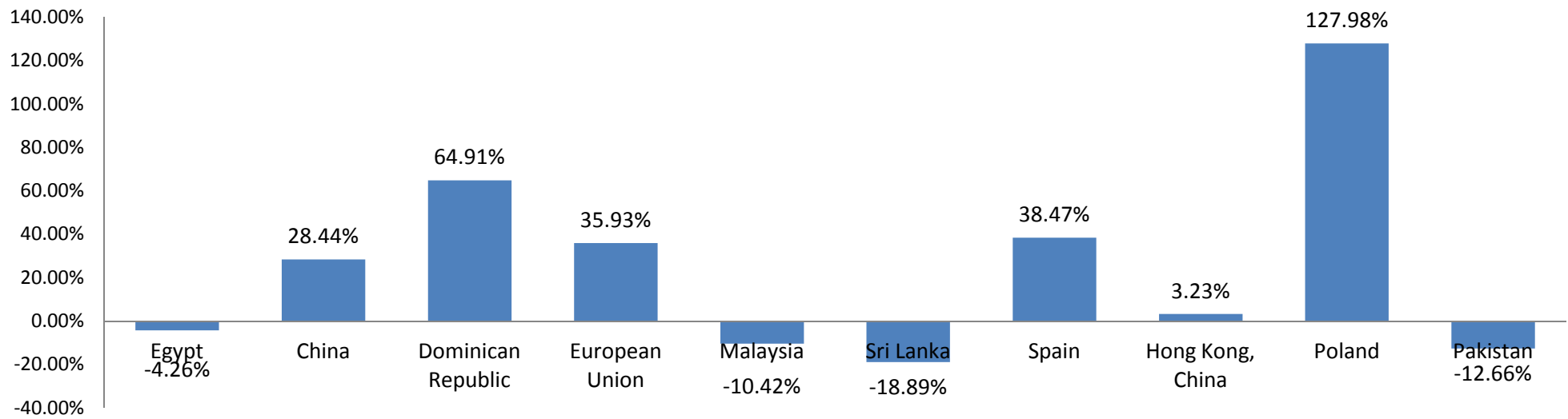
Table 1.11-India's exports to major partners in 1000 USD

| Export Destination | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | CAGR | UVR 2012 |
|--------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|---------|----------|
| Egypt | - | - | - | - | 23636.25 | 18813.38 | 9573.49 | 26940.38 | 19856.08 | -4.26% | 3.84 |
| China | 1441.77 | 2324.60 | 2896.53 | 1694.06 | 1273.33 | 1729.30 | 4111.53 | 4843.02 | 10676.40 | 28.44% | 2.18 |
| Dominican Republic | - | - | 682.87 | 789.24 | 3760.75 | 3378.00 | 13899.78 | 8651.02 | 13734.66 | 64.91% | 2.19 |
| European Union | 488.7 | 1273.21 | 930.04 | 2331.84 | 3096.36 | 1509.98 | 6776.22 | 10094.04 | 5695.47 | 35.93% | 2.71 |
| Malaysia | 9439.13 | 6415.32 | 6284.82 | 6379.22 | 8299.16 | 2908.73 | 9079.49 | 4427.52 | 3915.31 | -10.42% | 2.65 |
| Sri Lanka | 13823.48 | 19890.80 | 26739.46 | 22907.91 | 18657.51 | 13220.73 | 19748.15 | 2575.29 | 2590.47 | -18.89% | 5.79 |
| Spain | 184.89 | 764.10 | 157.65 | 476.89 | 1055.54 | 678.18 | 3842.34 | 4729.56 | 2498.40 | 38.47% | 2.45 |
| Hong Kong, China | 1449.1 | 1340.12 | 846.72 | 649.77 | 263.40 | 143.08 | 1580.94 | 2700.82 | 1869.12 | 3.23% | 2.25 |
| Poland | 1.41 | 435.89 | 1020.37 | 564.37 | 399.99 | 150.40 | 852.09 | 2323.73 | 1029.10 | 127.98% | 2.32 |
| Pakistan | 1797.94 | 389.96 | 21.89 | 69.39 | 287.31 | 119.90 | 2227.01 | 382.46 | 608.64 | -12.66% | 3.88 |

Table 1.12-India's RCA in major export destinations

| Export Destination | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | Analysis |
|--------------------|------|-------|-------|-------|-------|-------|------|------|------|--------------|
| China | 0.43 | 0.46 | 0.17 | 0.08 | 0.06 | 0.06 | 0.07 | 0.07 | 0.12 | RCD |
| Dominican Republic | - | - | 15.98 | 24.39 | 17.32 | 33.47 | 1.99 | 1.47 | 3.45 | All time RCA |
| Egypt, Arab Rep. | - | - | - | - | 1.36 | 2.09 | 0.96 | 2.92 | 1.85 | All time RCA |
| European Union | 0.13 | 0.38 | 0.37 | 0.61 | 0.71 | 0.29 | 0.95 | 1.41 | 1.23 | RCD to RCA |
| Hong Kong, China | 0.78 | 1.09 | 0.54 | 0.32 | 0.17 | 0.07 | 0.45 | 1.39 | 0.43 | Cyclical |
| Malaysia | 2.74 | 3.25 | 2.08 | 2.62 | 2.69 | 2.24 | 1.53 | 0.93 | 2.02 | All time RCA |
| Pakistan | 8.63 | 15.62 | 1.20 | 0.49 | 1.48 | 3.06 | 1.55 | 0.82 | 0.85 | Cyclical |
| Poland | 0.01 | 4.01 | 8.57 | 3.21 | 2.35 | 0.93 | 3.49 | 5.35 | 3.13 | RCA |
| Spain | 0.30 | 0.90 | 0.15 | 0.48 | 1.51 | 1.91 | 5.54 | 3.17 | 3.56 | RCD to RCA |
| Sri Lanka | 3.01 | 3.49 | 2.76 | 2.98 | 3.11 | 2.51 | 2.51 | 0.74 | 0.65 | RCA to RCD |

Figure (e)-Growth over a period of 2004-2012 in exports of 520511 from India to top 10 export destinations



Note: Interestingly India is also importing 520511 from other countries to a trade value of 3507.239 (1000 USD), quantity of 836506 Kg from Bangladesh, China, Egypt, France, Hong Kong, Indonesia, Italy, Japan, Korea, Sri Lanka, Mozambique, Malaysia, Pakistan, Portugal, Slovenia, Thailand, Turkey, United States and Vietnam. **The following pie chart depicts the % share of export destinations in India's total exports.**

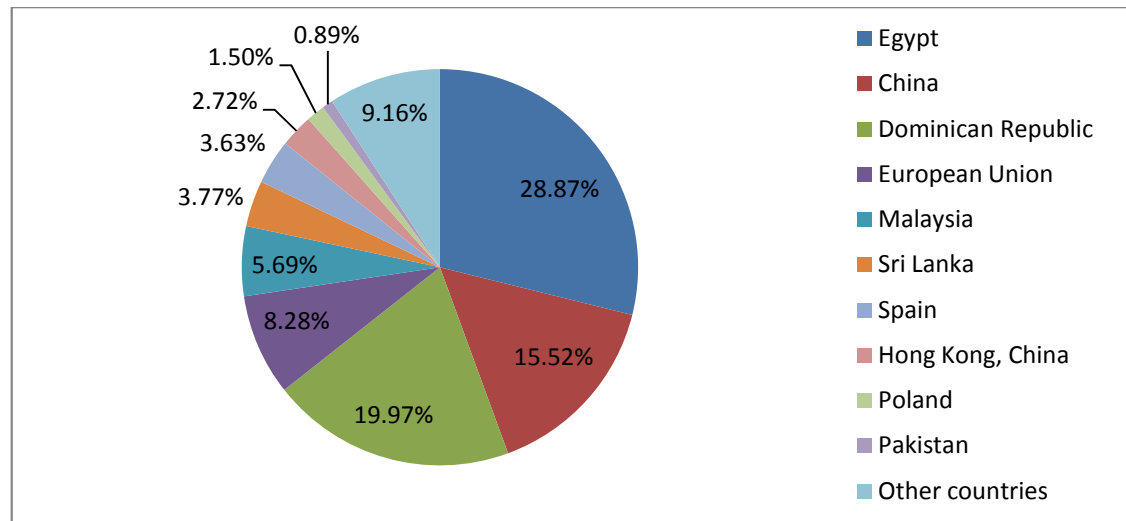


Table 1.13-Markets where India does not have presence

| Importing Country | Import Value 2012 | Imported Quantity 2012 | Exporting Countries |
|--------------------------|--------------------------|-------------------------------|--|
| Mexico | 6148.755 | 2211570 | Spain, Pakistan, El Salvador, United States |
| Slovak Republic | 5735.277 | 1781271 | Czech Republic, Germany, Spain, Italy, Turkey, Unspecified |
| Hungary | 2729 | 502984 | Germany, Spain, Italy, Pakistan, Turkey |
| Austria | 1206.895 | 293900 | Germany, France, Greece, Italy, Portugal, Romania, Turkey |
| Argentina | 930.727 | 220848 | Brazil |
| Madagascar | 341.121 | 155637 | France, Japan, Mauritius |
| Paraguay | 260.854 | 58647 | Brazil, Pakistan |
| Yugoslavia | 228.399 | 77176 | Bulgaria, Germany, Hungary, Italy, Macedonia, FYR, Pakistan, |
| Albania | 221.895 | 86836 | Italy |
| Bulgaria | 216.651 | 58266 | China, Indonesia, Italy, Korea Rep., Turkey |
| Macedonia, FYR | 139.793 | 64179 | China, Greece, Italy, Portugal, Yugoslavia, Turkey |
| Kazakhstan | 132 | 64600 | China, Turkey, Uzbekistan |
| Philippines | 112.157 | 42088 | China, Hong Kong, Indonesia, Japan, Other Asia |
| Greece | 110.64 | 25159 | France, Italy, Portugal, Turkey |
| Senegal | 106.424 | 103843 | Italy |
| Armenia | 103.685 | 43370 | Turkey |
| Netherlands | 87.626 | 78507 | Belgium, France, Italy, Turkey |
| Sweden | 86.675 | 20205 | Austria, China, Germany, Spain, United Kingdom, Italy |
| Bosnia & Herzegovina | 56.988 | 5026 | Macedonia, FYR |
| Mozambique | 32.64 | 17900 | China |
| Bahamas, The | 31.986 | 2217 | United States |
| Singapore | 31.247 | 2074 | China, Malaysia, Other Asia |
| Slovenia | 26.317 | 4121 | Germany, Turkey, Unspecified |
| Costa Rica | 23.361 | 9245 | United States |
| Norway | 18.245 | 1167 | Austria, Germany, Portugal, Sweden, United States |
| Lebanon | 16.107 | 4392 | Spain, Italy, Pakistan |
| Ghana | 16.03 | 9343 | Nigeria, Togo |
| Ecuador | 15.407 | 7514 | Indonesia |
| Cyprus | 6.853 | 1900 | Greece |
| Iceland | 4.911 | 406 | Other Asia, nes , United States |
| Cameroon | 4.136 | 1090 | China |
| Sudan | 3.784 | 3870 | China, Egypt, Arab Rep. |
| Yemen | 1.782 | 1200 | China |
| Croatia | 0.883 | 76 | Austria, Czech Republic |
| Nicaragua | 0.837 | 52 | China |
| Burundi | 0.612 | 1007 | Belgium, Tanzania |
| Kiribati | 0.404 | 78 | Japan |
| Cape Verde | 0.379 | 1080 | China |
| Luxembourg | 0.301 | 16 | Belgium |
| Brunei | 0.26 | 68 | China |
| Niger | 0.159 | 150 | Nigeria |
| Qatar | 0.15 | 45986 | Germany, Italy, Thailand |
| Uganda | 0.085 | 178 | China, Italy, Kenya |
| Tonga | 0.059 | 15 | New Zealand |
| Rwanda | 0.041 | 11 | Tanzania, Congo, Dem. Rep. |

| Table 1.14-Market wise competitive performance of India Vis a Vis competitors in terms of RCA (2004-2012) | | | | | | | | | | | |
|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------------|-----------------|
| Egypt Market | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | Analysis | UVR 2012 |
| Austria | | | | | 0.00 | 0.00 | 0.00 | 0.00 | 1.17 | RCD | 3.84 |
| China | | | | | 0.08 | 0.07 | 0.12 | 0.14 | 0.36 | RCD | 3.84 |
| Germany | | | | | 0.21 | 0.00 | 0.01 | 0.15 | 1.08 | RCD to RCA | 3.84 |
| Greece | | | | | 0.01 | 0.01 | 0.08 | 0.10 | 0.04 | RCD | 3.85 |
| Hong Kong, China | | | | | 0.03 | 0.02 | 0.00 | 0.03 | 0.29 | RCD | 3.85 |
| Hungary | | | | | 8.92 | 0.00 | #DIV/0! | #DIV/0! | 16.60 | RCA | 3.85 |
| India | | | | | 1.36 | 2.09 | 0.96 | 2.92 | 1.85 | All time RCA | 3.84 |
| Indonesia | | | | | 0.39 | 0.44 | 0.93 | 3.26 | 9.63 | RCD to RCA | 3.84 |
| Italy | | | | | 0.10 | 0.13 | 0.16 | 0.36 | 0.28 | RCD | 3.84 |
| Jordan | | | | | 0.00 | 0.00 | 0.89 | 0.00 | 4.16 | RCD to RCA | 3.84 |
| Malaysia | | | | | 2.47 | 1.76 | 1.04 | 0.12 | 0.68 | RCA to RCD | 3.84 |
| Other Asia, nes | | | | | 0.08 | 0.31 | 0.04 | 0.00 | 0.25 | RCD | 3.84 |
| Pakistan | | | | | 0.07 | 0.25 | 0.02 | 0.28 | 0.06 | RCD | 3.84 |
| Philippines | | | | | 0.00 | 0.00 | 0.00 | 0.54 | 14.19 | RCD to RCA | 3.85 |
| Slovenia | | | | | #DIV/0! | 0.00 | 0.00 | 14.65 | 11.28 | RCD to RCA | 3.84 |
| Syrian Arab Republic | | | | | 3.84 | 3.96 | 4.32 | 2.97 | 6.55 | All time RCA | 3.84 |
| Thailand | | | | | 0.23 | 0.03 | 0.36 | 0.00 | 0.73 | RCD | 3.84 |
| Turkey | | | | | 0.46 | 0.34 | 0.26 | 0.31 | 0.27 | RCD | 3.84 |
| United Arab Emirates | | | | | 0.19 | 0.00 | 0.00 | 0.00 | 2.62 | RCD to RCA | 3.84 |
| United Kingdom | | | | | 0.16 | 0.00 | 0.00 | 1.41 | 0.23 | Cyclical | 3.84 |
| United States | | | | | 0.29 | 0.04 | 0.00 | 0.00 | 0.18 | RCD | 3.84 |
| Vietnam | | | | | 0.00 | 1.52 | 0.00 | 0.00 | 2.21 | Cyclical | 3.84 |

- Egypt market has tough competition primarily on the basis of price and India enjoys an all time RCA in this market though the growth Rate is declining at a rate of -4.26%.

| China Market | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | Analysis | UVR 2012 |
|---------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-----------------|-----------------|
| Bangladesh | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.01 | RCD | 3.72 |
| Belgium | 2.15 | 0.39 | 0.21 | 0.07 | 0.00 | 0.00 | 0.00 | 0.00 | 0.78 | RCA to RCD | 3.44 |
| China | 0.55 | 0.33 | 0.38 | 0.34 | 0.17 | 0.31 | 0.51 | 0.50 | 1.38 | RCD to RCA | 2.56 |
| Hong Kong, China | 1.75 | 1.60 | 2.39 | 1.83 | 1.58 | 0.69 | 1.45 | 2.00 | 2.51 | All time RCA | 2.34 |
| India | 0.43 | 0.46 | 0.17 | 0.08 | 0.06 | 0.06 | 0.07 | 0.07 | 0.12 | RCD | 2.19 |
| Italy | 0.04 | 0.06 | 0.08 | 0.03 | 0.02 | 0.02 | 0.01 | 0.06 | 0.22 | RCD | 25.84 |
| Japan | 0.44 | 0.47 | 0.44 | 0.43 | 0.44 | 0.15 | 0.14 | 0.04 | 0.01 | RCD | 20.09 |
| Korea, Rep. | 0.02 | 0.03 | 0.02 | 0.01 | 0.01 | 0.01 | 0.07 | 0.02 | 0.00 | RCD | 15.00 |
| Malaysia | 2.13 | 0.31 | 0.00 | 0.00 | 1.72 | 0.08 | 0.94 | 0.00 | 0.24 | Cyclical | 3.10 |
| Other Asia, nes | 5.74 | 6.51 | 7.48 | 5.86 | 5.89 | 3.60 | 5.15 | 3.27 | 2.85 | All time RCA | 2.01 |
| Pakistan | 4.44 | 4.83 | 5.45 | 4.75 | 6.20 | 3.34 | 4.44 | 7.23 | 6.14 | All time RCA | 2.70 |
| Slovenia | 0.00 | 0.00 | 0.00 | 0.00 | 4.34 | 0.00 | 0.00 | 0.00 | 0.00 | RCD | 5.00 |
| South Africa | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.70 | RCD | 3.44 |
| Thailand | 13.86 | 9.62 | 12.33 | 10.74 | 8.28 | 5.33 | 8.96 | 13.11 | 11.18 | All time RCA | 3.08 |
| Turkmenistan | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.69 | 0.00 | 3.56 | RCA | 2.37 |
| Vietnam | 16.10 | 8.58 | 9.24 | 6.79 | 5.16 | 5.01 | 5.31 | 2.71 | 1.83 | All time RCA | 3.08 |

- In spite of India's UVR being competitive India faces RCD in the Chinese market although the growth rate is promising at 28.44%.

| Dominican Republic Market | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | Analysis | UVR 2012 |
|----------------------------------|-------------|-------------|--------------|--------------|--------------|--------------|-------------|-------------|-------------|---------------------|-----------------|
| China | | | 0.63 | 0.82 | 0.21 | 0.00 | 0.03 | 0.00 | 0.04 | RCD | NA |
| El Salvador | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.51 | 0.56 | RCD | NA |
| Guatemala | | | 2.18 | 16.36 | 0.00 | 0.66 | 0.00 | 0.23 | 3.13 | Cyclical | NA |
| Honduras | | | 10.82 | 7.20 | 1.40 | 0.00 | 0.23 | 0.12 | 0.64 | RCA to RCD | NA |
| India | | | 15.98 | 24.39 | 17.32 | 33.47 | 1.99 | 1.47 | 3.45 | All time RCA | NA |
| Indonesia | | | 0.00 | 0.00 | 38.32 | 0.00 | 0.00 | 0.90 | 0.89 | RCD | NA |
| Israel | | | 0.00 | 0.00 | 0.00 | #DIV/0! | #DIV/0! | #DIV/0! | 6.65 | RCA | NA |
| Mexico | | | 0.48 | 2.60 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | RCD | NA |
| Pakistan | | | 17.90 | 25.54 | 8.76 | 4.37 | 0.45 | 0.50 | 0.88 | RCA to RCD | NA |
| Spain | | | 1.62 | 1.97 | 0.00 | 2.13 | 0.05 | 0.00 | 0.00 | Cyclical | NA |
| Sri Lanka | | | #DIV/0! | 0.00 | #DIV/0! | #DIV/0! | #DIV/0! | #DIV/0! | 3.18 | RCD to RCA | NA |
| Turkey | | | 6.15 | 67.69 | 0.00 | 0.00 | 0.00 | 0.00 | 0.39 | RCA to RCD | NA |
| United States | | | 0.15 | 0.49 | 0.24 | 0.35 | 1.24 | 1.14 | 1.00 | RCD to RCA | NA |
| Unspecified | | | #DIV/0! | 0.00 | 0.00 | #DIV/0! | 0.00 | 0.00 | 1.79 | RCA | NA |
| Vietnam | | | 0.00 | #DIV/0! | #DIV/0! | #DIV/0! | 1.03 | 0.00 | 0.74 | Cyclical | NA |

- India enjoys an all time RCA in the Dominican Republic market supported by the high growth rate of 64.91%.

| European Union Market | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | Analysis | UVR 2012 |
|------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------------|-----------------|
| Argentina | 0.51 | 5.21 | 0.00 | 6.50 | 0.00 | 9.92 | 2.25 | 1.07 | 1.06 | RCD to RCA | 2.26 |
| Bosnia & Herzegovina | 0.12 | 0.36 | 2.49 | 51.53 | 132.60 | 82.61 | 55.97 | 12.21 | 19.25 | RCD to RCA | 4.02 |
| China | 3.50 | 2.11 | 0.62 | 0.09 | 0.07 | 0.11 | 0.12 | 0.13 | 0.12 | RCA to RCD | 3.22 |
| Croatia | 0.04 | 0.00 | 0.00 | 0.00 | 0.51 | 0.00 | 0.00 | 0.03 | 0.80 | RCD | 3.10 |
| Egypt, Arab Rep. | 0.24 | 0.14 | 0.25 | 0.38 | 0.24 | 0.42 | 0.15 | 0.13 | 0.15 | RCD | 4.31 |
| Hong Kong, China | 42.97 | 34.21 | 14.48 | 17.05 | 10.74 | 0.00 | 2.36 | 0.11 | 2.47 | Cyclical | 100.91 |
| India | 0.13 | 0.38 | 0.37 | 0.61 | 0.71 | 0.29 | 0.95 | 1.41 | 1.23 | RCD to RCA | 2.71 |
| Indonesia | 0.32 | 0.65 | 0.26 | 0.16 | 0.01 | 0.21 | 0.36 | 0.61 | 0.09 | RCD | 1.28 |
| Japan | 0.01 | 0.04 | 0.03 | 0.04 | 0.01 | 0.01 | 0.03 | 0.00 | 0.05 | RCD | 42.76 |
| Nigeria | 0.21 | 0.00 | 0.00 | 3.02 | 3.48 | 1.15 | 3.59 | 1.25 | 5.63 | RCD to RCA | 2.29 |
| Pakistan | 0.14 | 0.30 | 0.82 | 0.78 | 0.52 | 0.52 | 0.63 | 0.90 | 0.92 | RCD | 5.25 |
| Russian Federation | 0.02 | 0.04 | 0.03 | 0.01 | 0.02 | 0.00 | 0.00 | 0.20 | 0.59 | RCD | 3.01 |
| Saudi Arabia | 4.60 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.07 | RCA | 3.00 |
| South Africa | 0.00 | 8.87 | 9.09 | 0.00 | 0.56 | 0.03 | 1.31 | 0.00 | 1.33 | Cyclical | 2.57 |
| Switzerland | 0.05 | 0.14 | 0.04 | 0.00 | 0.02 | 0.01 | 0.00 | 0.02 | 0.00 | RCD | 8.66 |
| Syrian Arab Republic | 0.15 | 0.00 | 0.55 | 0.27 | 0.33 | 0.11 | 0.24 | 0.92 | 0.53 | RCD | 2.78 |
| Thailand | 0.99 | 0.96 | 0.11 | 0.28 | 0.00 | 0.15 | 0.08 | 0.09 | 0.01 | RCD | 39.59 |
| Tunisia | 1.08 | 1.84 | 1.04 | 0.99 | 0.70 | 1.32 | 1.08 | 3.06 | 3.65 | Cyclical | 2.58 |
| Turkey | 1.92 | 1.76 | 2.41 | 2.90 | 2.27 | 1.63 | 1.69 | 2.33 | 1.87 | All time RCA | 2.72 |
| Turkmenistan | 2.49 | 3.22 | 2.80 | 2.59 | 3.17 | 6.94 | 3.70 | 2.13 | 4.70 | All time RCA | 2.36 |
| United Arab Emirates | 0.39 | 11.49 | 0.00 | 0.00 | 0.00 | 0.12 | 0.00 | 0.00 | 0.04 | RCD | 3.02 |
| United States | 0.19 | 1.58 | 3.46 | 2.04 | 0.06 | 0.02 | 0.07 | 0.00 | 0.00 | Cyclical | 3.02 |

- Over the years, India has moved from RCD to RCA in the European Union market with a competitive UVR of 2.71 and a growth rate of 35.93%.

| Malaysia Market | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | Analysis | UVR 2012 |
|------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------------|-------------|
| Canada | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | #DIV/0! | 0.00 | 0.00 | 9.51 | RCA | 5.04 |
| China | 1.19 | 1.11 | 0.98 | 0.48 | 0.94 | 1.75 | 1.62 | 2.19 | 3.44 | Cyclical | 4.72 |
| Germany | 0.07 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.50 | RCD | 7.99 |
| Hong Kong, China | 0.69 | 0.03 | 0.05 | 0.23 | 0.50 | 1.17 | 0.91 | 0.64 | 0.13 | Cyclical | 4.15 |
| India | 2.74 | 3.25 | 2.08 | 2.62 | 2.69 | 2.24 | 1.53 | 0.93 | 2.02 | All time RCA | 2.65 |
| Indonesia | 2.35 | 2.21 | 1.15 | 0.76 | 0.98 | 1.16 | 0.68 | 1.38 | 0.46 | Cyclical | 2.54 |
| Japan | 0.75 | 0.36 | 0.02 | 0.22 | 0.15 | 0.05 | 0.06 | 0.02 | 0.08 | RCD | 6.00 |
| Korea, Rep. | 1.18 | 1.50 | 1.99 | 2.90 | 3.91 | 3.46 | 5.22 | 2.66 | 4.07 | All time RCA | 4.45 |
| Other Asia, nes | 0.12 | 0.10 | 0.01 | 0.27 | 0.91 | 0.50 | 0.18 | 2.25 | 0.15 | Cyclical | 10.47 |
| Pakistan | 2.05 | 4.00 | 2.62 | 4.30 | 2.26 | 4.11 | 3.60 | 6.67 | 11.05 | All time RCA | 3.45 |
| Thailand | 0.71 | 0.66 | 0.16 | 0.66 | 0.99 | 0.82 | 0.63 | 1.27 | 1.86 | RCD to RCA | 3.75 |
| United States | 0.00 | 0.00 | 0.00 | 0.01 | 0.02 | 0.00 | 0.09 | 0.16 | 0.11 | RCD | 4.14 |
| Vietnam | 1.86 | 2.50 | 4.27 | 3.12 | 0.97 | 2.51 | 0.86 | 2.52 | 2.75 | All time RCA | 3.22 |

- India enjoys an all time RCA in the Malaysia market with the second lowest UVR of 2.65 but faces negative growth of -10.42%.

| Sri Lanka Market | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | Analysis | UVR 2012 |
|-------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------------|-----------------|
| China | 0.27 | 0.30 | 0.62 | 0.57 | 0.28 | 0.20 | 0.34 | 1.68 | 1.66 | RCD to RCA | 6.80 |
| Germany | 1.15 | 0.98 | 0.58 | 0.06 | 0.00 | 0.00 | 0.00 | 0.25 | 2.21 | Cyclical | 32.58 |
| Hong Kong, China | 0.61 | 0.22 | 0.14 | 0.05 | 0.18 | 0.28 | 0.68 | 0.65 | 0.49 | RCD | 4.80 |
| India | 3.01 | 3.49 | 2.76 | 2.98 | 3.11 | 2.51 | 2.51 | 0.74 | 0.65 | RCA to RCD | 5.79 |
| Indonesia | 5.18 | 4.45 | 4.09 | 2.32 | 0.31 | 0.28 | 1.29 | 3.40 | 2.24 | All time RCA | 3.13 |
| Korea, Rep. | 0.40 | 1.27 | 0.94 | 0.57 | 0.00 | 0.00 | 0.82 | 1.57 | 0.02 | Cyclical | 4.65 |
| Macao | #DIV/0! | #DIV/0! | 0.00 | #DIV/0! | 23.38 | 23.84 | 11.52 | 1.22 | 10.48 | All time RCA | 10.24 |
| Other Asia, nes | 0.02 | 0.17 | 0.24 | 0.74 | 0.04 | 0.00 | 0.01 | 0.28 | 1.39 | RCD to RCA | 4.68 |
| Pakistan | 0.80 | 0.45 | 0.48 | 0.45 | 0.16 | 0.19 | 0.05 | 0.39 | 0.72 | RCD | 4.76 |
| Thailand | 0.08 | 0.09 | 0.15 | 0.07 | 0.03 | 0.00 | 0.00 | 0.02 | 0.79 | RCD | 12.54 |
| Vietnam | 0.00 | 0.28 | 1.24 | 3.65 | 4.67 | 7.74 | 3.53 | 5.98 | 9.10 | All time RCA | 2.91 |

- In the Sri Lanka market, India has lost its competitiveness and moved from RCA to RCD with a UVR of 5.79 and negative growth of -18.89%.

| Spain Market | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | Analysis | UVR 2012 |
|---------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------------|-----------------|
| Belgium | 0.13 | 0.12 | 0.17 | 1.91 | 0.00 | 0.00 | 0.34 | 0.02 | 0.23 | RCD | 2.86 |
| China | 0.00 | 0.01 | 0.03 | 0.07 | 0.09 | 0.00 | 0.00 | 0.01 | 0.41 | RCD | 3.52 |
| France | 0.06 | 0.15 | 0.01 | 0.02 | 0.01 | 0.00 | 0.00 | 0.02 | 0.02 | RCD | 8.68 |
| Germany | 4.27 | 1.68 | 0.65 | 0.54 | 0.24 | 0.10 | 0.10 | 0.19 | 0.05 | RCA to RCD | 2.80 |
| India | 0.30 | 0.90 | 0.15 | 0.48 | 1.51 | 1.91 | 5.54 | 3.17 | 3.56 | RCD to RCA | 2.45 |
| Italy | 1.49 | 1.65 | 2.64 | 2.27 | 2.14 | 1.84 | 1.16 | 0.65 | 0.85 | RCA to RCD | 2.67 |
| Nigeria | 0.42 | 0.00 | 0.00 | 26.00 | 77.70 | 0.00 | 0.00 | 0.00 | 12.85 | RCA | 2.25 |
| Pakistan | 0.00 | 0.00 | 0.44 | 0.76 | 1.20 | 1.72 | 1.52 | 1.14 | 0.96 | Cyclical | 4.14 |
| Portugal | 0.61 | 1.00 | 0.91 | 0.81 | 0.71 | 0.33 | 0.07 | 0.08 | 0.18 | RCD | 4.98 |
| Slovenia | 7.78 | 0.00 | 1.20 | 0.95 | 2.14 | 0.00 | 6.43 | 8.22 | 2.89 | RCA | 5.66 |
| South Africa | 0.00 | 0.00 | 0.00 | 0.00 | 8.09 | 0.00 | 3.45 | 0.00 | 6.33 | RCA | 2.55 |
| Tunisia | 0.00 | 0.43 | 0.94 | 0.24 | 1.97 | 7.05 | 0.00 | 15.17 | 23.44 | Cyclical | 2.66 |
| Turkey | 0.41 | 0.24 | 0.48 | 0.96 | 1.37 | 0.81 | 0.44 | 2.69 | 1.53 | Cyclical | 2.52 |

- India has moved from RCD to RCA in the Spain market with a UVR of 2.45 and a growth rate of 38.47%.

| Hong Kong Market | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | Analysis | UVR 2012 |
|------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-----------------|-------------|
| Bulgaria | 0.00 | 0.00 | 0.00 | 0.00 | 4.15 | 0.00 | 0.00 | 0.00 | 5.11 | RCA | 16.98 |
| China | 0.41 | 0.36 | 0.39 | 0.35 | 0.33 | 0.60 | 0.58 | 0.76 | 0.83 | RCD | 2.51 |
| Germany | 0.04 | 0.01 | 0.01 | 0.00 | 0.00 | 0.03 | 0.09 | 0.14 | 0.07 | RCD | 38.46 |
| India | 0.78 | 1.09 | 0.54 | 0.32 | 0.17 | 0.07 | 0.45 | 1.39 | 0.43 | Cyclical | 2.25 |
| Italy | 0.32 | 0.19 | 0.16 | 0.14 | 0.11 | 0.21 | 0.10 | 0.28 | 0.15 | RCD | 27.28 |
| Japan | 0.11 | 0.09 | 0.04 | 0.03 | 0.03 | 0.02 | 0.04 | 0.20 | 0.06 | RCD | 52.70 |
| Other Asia, nes | 3.21 | 2.35 | 2.84 | 2.75 | 3.52 | 4.38 | 5.26 | 1.94 | 2.36 | All time RCA | 2.63 |
| Pakistan | 4.57 | 5.90 | 5.56 | 6.41 | 7.54 | 4.84 | 4.02 | 3.97 | 4.27 | All time RCA | 2.75 |
| Peru | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.07 | RCD | 15.88 |
| Thailand | 4.55 | 0.21 | 0.14 | 0.00 | 0.03 | 0.08 | 0.22 | 0.45 | 0.16 | RCA to RCD | 4.64 |
| United Kingdom | 0.00 | 0.00 | 0.09 | 0.00 | 0.00 | 0.01 | 0.00 | 0.05 | 0.00 | RCD | 33.25 |

- India has shown an inconsistent performance in the Hong Kong market with a UVR of 2.25 and a growth rate of 3.23%.

| Poland Market | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | Analysis | UVR 2012 |
|----------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-----------------|-----------------|
| Belgium | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.01 | 0.00 | 0.04 | RCD | 4.24 |
| China | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.20 | 0.28 | RCD | 2.22 |
| Czech Republic | 0.65 | 3.02 | 0.82 | 0.51 | 2.77 | 1.25 | 1.91 | 0.86 | 0.53 | Cyclical | 1.61 |
| Germany | 0.07 | 0.04 | 0.03 | 0.38 | 0.50 | 0.14 | 1.43 | 0.25 | 0.24 | Cyclical | 3.64 |
| Hungary | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.35 | RCA | 9.66 |
| India | 0.01 | 4.01 | 8.57 | 3.21 | 2.35 | 0.93 | 3.49 | 5.35 | 3.13 | RCA | 2.32 |
| Italy | 3.28 | 2.01 | 1.47 | 1.34 | 0.91 | 1.07 | 0.04 | 0.02 | 0.16 | RCA to RCD | 14.70 |
| Japan | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | RCD | 6.00 |
| Netherlands | 0.00 | 0.00 | 0.01 | 0.00 | 0.00 | 0.00 | 0.09 | 0.01 | 0.00 | RCD | 2.71 |
| Nigeria | #DIV/0 | 0.00 | 0.00 | 0.00 | #DIV/0 | 0.00 | 0.00 | 0.00 | 6.59 | RCA | 2.40 |
| Pakistan | 0.00 | 0.00 | 0.00 | 0.00 | 0.63 | 2.60 | 0.00 | 3.38 | 0.26 | Cyclical | 5.45 |
| Portugal | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.03 | RCD | 10.65 |
| Spain | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.27 | 3.86 | RCA | 2.68 |
| Turkey | 2.09 | 1.83 | 1.15 | 2.10 | 1.65 | 2.86 | 1.28 | 0.61 | 1.42 | All time RCA | 2.56 |
| Turkmenistan | 0.00 | 2.45 | 8.23 | 0.00 | 5.66 | 17.46 | 0.00 | 0.00 | 21.98 | RCA | 2.26 |
| United Kingdom | 0.00 | 0.00 | 0.20 | 0.00 | 0.00 | 1.34 | 1.20 | 5.35 | 4.04 | RCD to RCA | 11.54 |

- India has moved to a competitive position in the Poland market with a UVR of 2.32 and a promising growth rate of 127.98%.

| Pakistan Market | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | Analysis | UVR 2012 |
|------------------------|-------------|--------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-----------------|-----------------|
| Bangladesh | 0.00 | #DIV/0! | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 13.77 | 107.57 | RCA | 3.49 |
| China | 0.00 | 0.00 | 0.00 | 12.04 | 7.38 | 0.00 | 2.13 | 2.38 | 2.33 | All time RCA | 4.45 |
| Denmark | 0.00 | 0.00 | #DIV/0! | #DIV/0! | 0.00 | 20.03 | #DIV/0! | 30.54 | 50.91 | RCA | 4.28 |
| India | 8.63 | 15.62 | 1.20 | 0.49 | 1.48 | 3.06 | 1.55 | 0.82 | 0.85 | Cyclical | 3.88 |
| Indonesia | 0.00 | 0.00 | 10.64 | 0.00 | 0.00 | 0.00 | 48.81 | 50.31 | 36.94 | RCA | 5.30 |
| South Africa | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | #DIV/0! | 0.00 | #DIV/0! | 3.35 | RCA | 3.40 |
| Turkey | 33.67 | 0.00 | 0.32 | 0.00 | 0.00 | 0.00 | 28.56 | 0.00 | 0.46 | Cyclical | 4.28 |
| Turkmenistan | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.38 | 0.00 | 29.97 | RCD to RCA | 3.50 |
| United Arab Emirates | 1.07 | 0.00 | 0.00 | 3.06 | 32.18 | 13.86 | 0.01 | 0.00 | 0.01 | RCA to RCD | 3.45 |
| United Kingdom | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.01 | RCD | 5.86 |

- India has lost its competitiveness in the Pakistan market with a UVR of 3.88 and a negative growth of -12.66%

Reasoning

China exports to Hong Kong, the items of cotton yarn concerned with “Cotton yarn, not for retail” which indicates that the products are intra industry. It is conceived that China sends some semi treated cotton yarn to some plants in Hong Kong for some slight further processing. Most exports of Hong Kong in this basket are in fact Re-exports, that implies that only slight processing handling is done at the plants in Hong Kong (like re-packaging, which in case of yarn could be like re-distribution of large volumes yarn to machine ready sizes of yarn).

- **Reasons for the growth of Indian exports to the Chinese market are due to multiple reasons:**

1. Imports free of quota limits, are cheaper than domestic yarn
2. Stockpiling makes domestic cotton about 40% more expensive
3. Mills in China also face rising labor costs and manpower shortages, with many having sold their spinning machines to plants in Malaysia, Pakistan and Vietnam

- **Reasons for the increase in exports during 2008-12 to Egypt include:**

1. Agricultural land under cotton production has reduced to 1/4th of its size in the 1990's.
2. The old industries require long staple fiber; they can't produce fabric from short staple fiber which is most widely used these days.
3. There are irrigation problems and lack of government support in Egypt for development of cotton industry.

- **Reasons for decline in exports to Egypt over last two years:**

1. Wrongful imposition of penal duties on cotton yarn imported from India.
2. Imposition of safeguard duties to the extent of 13-14% over the customs duty.
3. India has asked WTO to intervene and solve the matter.

- Major markets in the world in terms of import value where India doesn't have presence include Mexico (North America), Slovak republic, Hungary, Austria (Europe), Argentina (South America), Madagascar(Africa) and many more. To figure out the most lucrative markets amongst these, we must consider not only the import value but the tariff structures in these countries, their distance from India to cover the transit cost, logistic problems etc.

- If we look at the tariff rates, we understand why India has not been able to export to Argentina and Madagascar and probably Mexico. However, the European nations with lower tariff rate should be targeted as we are already exporting to some of their neighboring countries so the transportation cost problem, tariff issues are already resolved.

- The trade partners to whom we have been exporting since 2004 but have lost considerable market share in these markets are also to be analyzed to study the reasons behind the lost markets and possible solutions in terms of competitor analysis, government intervention, and policy measures and cost analysis to capture these markets again. Also, the prospective countries to which we can export and have still not been able to tap those markets should be analyzed elaborately.

Absence of Trade with Latin American Countries

- Though there exists immense potential for trade between India and Latin American countries, India has not been able to leverage that due to the following reasons:

1. There is no direct shipping service from India to LA countries. Goods have to be shipped to Europe or Singapore which increases freight costs and shipping times. Transport costs acts as a significant trade barrier between these regions. China has direct shipping links with Latin America through the Panama Canal. Also, it is planning to build a rail link through Columbia to trade with LA countries.
 2. Also, China so as to overcome existing barriers of trade with Latin America has taken an indirect route and adopted strategic moves to increase their trade in the region.
- China is rivalling with World Bank and Inter-American Development Bank as a major lender to Latin America. Latin America gets trade financing from the Bank of China and investments by the China Investment Corporation. This benefits their co-operation in diverse areas from agriculture to space technology.
 - China has joined the Washington-based IDB with a \$350 million loan to develop LAC's small businesses. China has signed free trade agreements with Chile, Peru and Costa Rica, for example Chile and China have signed agreements to increase cooperation in mining, banking and telecommunications.