



EU Market Watch (Apr-Oct'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 \$ 143.45 billion during the period Apr-Oct'15 as compared to \$ 147.11 billion during the same period in 2016. The total T&C imports during the months Apr-Oct of 2016 has witnessed a positive growth of 2.55% over the same period during 2015.

Tab-1:EU import of T&C

Period	Import (\$ Bn)
2015	237.17
April-Oct'15	143.45
April-Oct'16	147.11
Growth (%)	(+) 2.55

Being one of the largest markets, the major T&C exporting countries have always been trying to enhance their market share by increasing competitiveness. It ultimately leads 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 **TC Market/Country Report for April-October'2016** has tried to analyse India's position in EU market vis-à-vis competitors so as to provide feedbacks 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-Oct'16)

2.1 Extra-EU

- EU T&C imports from the extra EU were \$ 71.91 billion in Apr-Oct'16.
- EU import from extra EU of T&C is 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 extra EU was to the tune of \$ 59.44 billion (82.66%) during Apr-Oct'16 and imports in textiles items are worth \$ 12.47 billion (17.34%).
- China is leading in textiles and clothing export in EU market with \$ 24.70 billion, contributes 34.58 percent during Apr-Oct'16.
- Bangladesh is distant second with \$ 9.88 billion followed by Turkey with \$ 9.23 billion, India with \$ 5.02 billion and Pakistan \$ 3.11 billion during Apr-Oct'16.
- Bangladesh's share in the overall export of T&C is 13.84% followed by Turkey (12.93%), India (7.03%) and Pakistan (4.35%) etc.

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

Exporter	Apr-Oct' 15	Apr-Oct' 16	% Change
China	26.11	24.70	↓ -5.41%
Bangladesh	9.31	9.88	↑ 6.17%
Turkey	9.19	9.23	↑ 0.49%
India	4.96	5.02	↑ 1.14%
Pakistan	2.96	3.11	↑ 5.05%
RoW	18.97	19.97	↑ 5.26%
Extra-EU	71.50	71.91	↑ 0.57%

Source: Eurostat

2.2 Intra-EU

- EU T&C imports from the intra EU were \$ 75.20 billion in Apr-Oct'16.
- EU import from intra EU of T&C is 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 \$ 53.03 billion (70.52%) during Apr-Oct'16 and imports in textiles items are worth \$ 22.17 billion (29.48%).
- Germany is leading in textiles and clothing export in intra EU market with \$ 15.06 billion, contributes 20.02 percent during Apr-Oct'16.

- Italy is distant second with \$ 9.90 billion followed by Netherlands with \$ 6.68 billion, Belgium \$ 6.65 billion and Spain with \$ 5.91 billion during Apr-Oct'16.
- Italy's share in the overall export of T&C is 13.16% followed by Netherland (8.89%), Belgium (8.84%) and Spain (7.86%) etc.

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

Exporter	Apr-Oct' 15	Apr-Oct' 16	% Change
Germany	14.06	15.06	↑ 7.05%
Italy	9.62	9.90	↑ 2.86%
Netherlands	6.25	6.68	↑ 6.94%
Belgium	6.39	6.65	↑ 4.03%
Spain	5.44	5.91	↑ 8.66%
RoEU	29.25	31.01	↑ 6.00%
Intra-EU	71.02	75.20	↑ 5.89%

Source: Eurostat

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

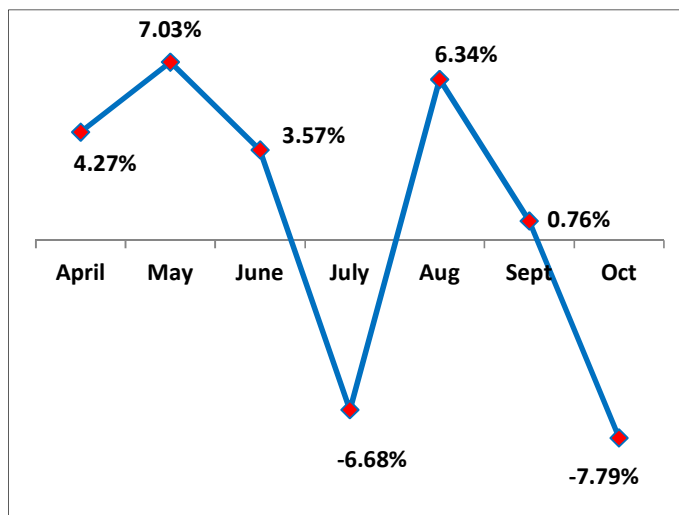
- India's T&C export to EU during Apr-Oct' 2016 is \$ 5.02 billion as compared to \$ 4.96 billion during the same period of the previous year, which accounts about 25 percent of India's total T&C export to the world.
- India's aggregate export of textiles to EU (Chapter 50 to 60) is \$ 1.04 billion during Apr-Oct'16 which is 12 percent of India's total textiles exports to the world.
- India's aggregate export of clothing to EU (Chapter 61 to 63) is \$ 3.98 billion during Apr-Oct'16 which is 34 percent of India's total clothing exports to the world.
- Top 22 Products (whose share is more than 1%) contributed 51.67 percent to the export basket in EU market during Apr-Oct'16.
- The share of these top 22 products is 51.41 percent in the same period of 2015.

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

Month	April-October		
	2015	2016	% Change
April	814.32	849.07	4.27
May	683.69	731.74	7.03
June	712.73	738.14	3.57
July	752.39	702.12	-6.68
August	691.43	735.30	6.34
September	663.34	668.40	0.76
October	647.03	596.60	-7.79
Apr-Oct	4964.9	5021.4	1.14

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.

3.1 India's Top Performing Products in EU market (Apr–Oct'16)

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

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

Products	Descriptions	Apr-Oct' 15	Apr-Oct' 16	% change
61044200	women's or girls dresses of cotton, knitted	50.52	51.78	2.49
61046200	women's or girls trousers, bib and brace overalls, breeches and shorts of cotton, knitted	119.58	127.99	7.03
61091000	t-shirts, singlets and other vests of cotton, knitted	442.83	452.90	2.28
61099020	t-shirts, singlets, knitted, of artificial fibres	64.63	74.07	14.60
61112090	babies' garments accessories, of cotton, knitted	171.09	202.81	18.54
62034235	men's or boys' trousers of cotton, woven	50.74	57.69	13.70
62044400	women's or girls dresses of artificial fibres, woven	75.76	92.07	21.53
62063000	women's or girls blouses, shirts, of cotton, woven	158.08	161.93	2.43
62064000	women's or girls blouses, shirts, of m-m fibres woven	259.55	262.26	1.05
63026000	toilet linen and kitchen linen, of terry towelling, of cotton	91.62	103.96	13.47
63053219	flexible intermediate bulk containers, of polyethylene or polypropylene strip, woven	131.38	135.70	3.28
Total		1615.78	1723.16	6.65

Source: Eurostat

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

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

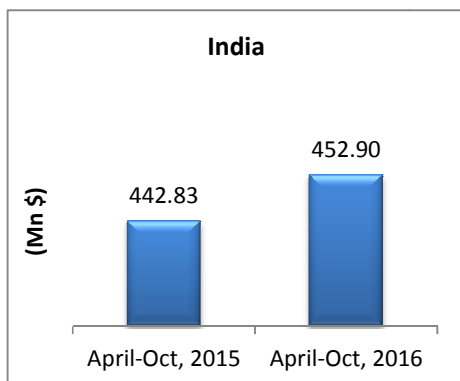
Table-6: Top Products having negative growth (Mn \$)

Products	Descriptions	Apr-Oct' 15	Apr-Oct' 16	% change
61051000	men's or boys shirts of cotton, knitted	82.68	76.35	-7.66
61071100	men's or boys underpants and briefs of cotton, knitted	57.16	52.56	-8.06
61072100	men's or boys nightshirts of cotton, knitted	63.75	63.09	-1.04
61083100	women's or girls nightdresses of cotton, knitted	108.15	105.72	-2.24
61102091	men's or boys' jerseys, pullovers, of cotton, knitted	58.36	58.07	-0.50
61102099	women's or girls' jerseys, pullovers, of cotton, knitted	65.14	61.69	-5.31
62044200	women's or girls dresses of cotton, woven	84.20	73.32	-12.93
62044300	women's or girls dresses of synthetic fibres, woven	102.29	85.06	-16.84
62052000	men's or boys shirts of cotton, woven	190.56	180.09	-5.49
62114390	women's or girls' garments, of m-m fibres, woven	66.29	60.13	-9.29
63025100	table linen of cotton, woven	52.55	51.06	-2.82
Total		931.12	867.14	-6.87

Source: Eurostat

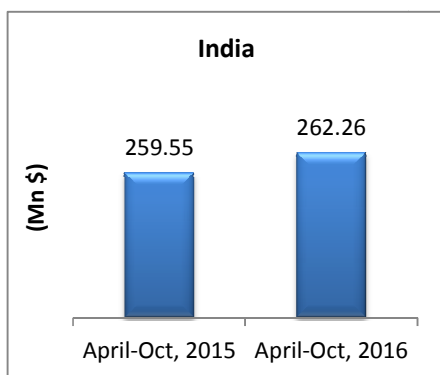
4.0 India's Product wise Performance vis-à-vis Competitors (Apr-Oct'16) over previous year

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



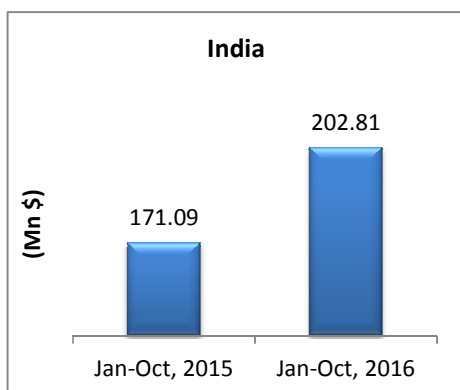
Rank	County	% change
1	Bangladesh	↑ 1.57%
2	Germany	↑ 1.93%
3	Turkey	↑ 3.13%
4	India	↑ 2.28%
5	Netherlands	↑ 9.56%
6	Belgium	↑ 4.81%
7	China	↓ -17.46%
8	Italy	↑ 16.54%
9	Spain	↑ 15.33%
10	UK	↑ 13.26%

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



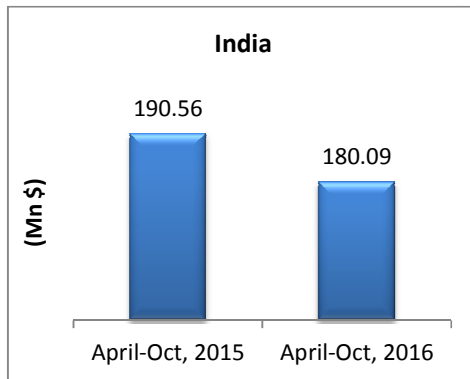
Rank	County	% change
1	China	↓ -3.12%
2	India	↑ 1.05%
3	Germany	↑ 19.68%
4	Spain	↑ 1.20%
5	Turkey	↓ -10.05%
6	Morocco	↑ 5.00%
7	Romania	↓ -9.33%
8	Bangladesh	↑ 21.40%
9	Poland	↑ 21.45%
10	UK	↑ 19.92%

3. Babies' garments and clothing accessories, of cotton, knitted or crocheted (61112090)



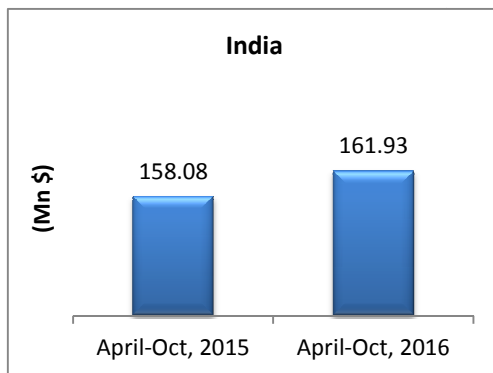
Rank	County	% change
1	China	↓ -11.43%
2	Bangladesh	↑ 6.52%
3	India	↑ 18.54%
4	Germany	↑ 69.12%
5	France	↑ 8.49%
6	Poland	↑ 45.13%
7	Turkey	↑ 10.68%
8	Netherlands	↑ 27.35%
9	Spain	↑ 12.46%
10	Portugal	↑ 32.16%

4. Men's or boys shirts of cotton, excl. knitted or crocheted, nightshirts, singlets and other vests): Of cotton (62052000)



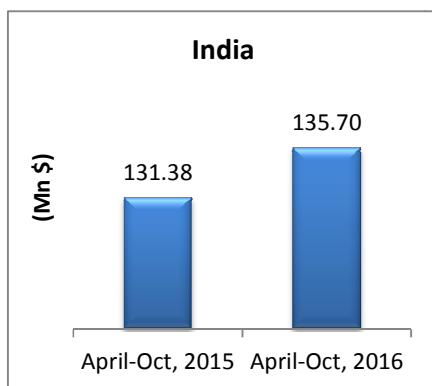
Rank	Country	% change
1	Bangladesh	-3.53%
2	China	-20.49%
3	Germany	0.69%
4	Turkey	-4.51%
5	India	-5.49%
6	Italy	-6.50%
7	Spain	7.68%
8	Netherlands	-6.62%
9	Vietnam	2.12%
10	UK	-5.06%

5. Women's or girl blouses, shirts of cotton, excl. knitted or crocheted (62063000)



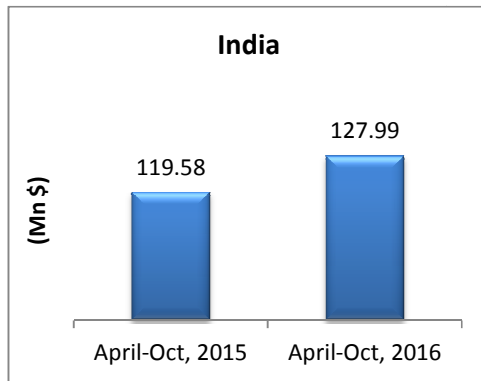
Rank	Country	% change
1	India	2.43%
2	Bangladesh	-2.56%
3	Germany	14.92%
4	China	-14.95%
5	Spain	44.64%
6	Turkey	0.64%
7	Morocco	79.48%
8	Italy	2.01%
9	Poland	43.78%
10	Netherlands	15.81%

6. Flexible intermediate bulk containers, for the packing of goods, of polyethylene or polypropylene strip or the like, excl. knitted or crocheted (63053219)



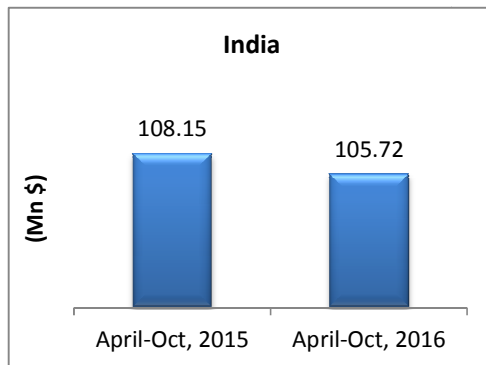
Rank	Country	% change
1	India	3.28%
2	Turkey	0.97%
3	Bangladesh	-8.68%
4	Belgium	25.26%
5	Czech Rep.	14.02%
6	Romania	-3.78%
7	Netherlands	-12.96%
8	China	-14.13%
9	Germany	-5.06%
10	Bulgaria	-12.06%

7. Women's or girls' trousers, bib and brace overalls, breeches and shorts of cotton, knitted or crocheted, excl. panties and swimwear (61046200)



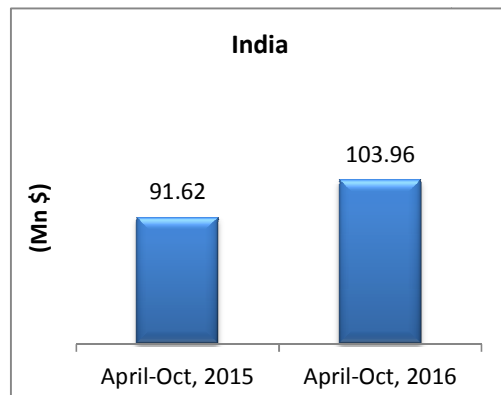
Rank	Country	% change
1	Bangladesh	7.55%
2	Germany	22.28%
3	China	-16.13%
4	India	7.03%
5	Cambodia	13.44%
6	Belgium	13.98%
7	Turkey	-22.56%
8	France	9.23%
9	Netherlands	12.99%
10	Poland	43.28%

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



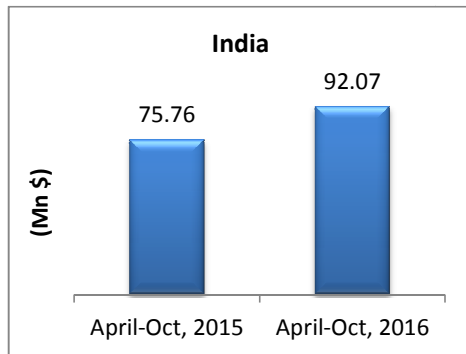
Rank	Country	% change
1	India	-2.24%
2	Bangladesh	7.53%
3	China	-27.22%
4	Germany	-8.96%
5	Turkey	-3.39%
6	Netherlands	5.44%
7	Belgium	-0.33%
8	Poland	17.39%
9	France	11.67%
10	Cambodia	-3.73%

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



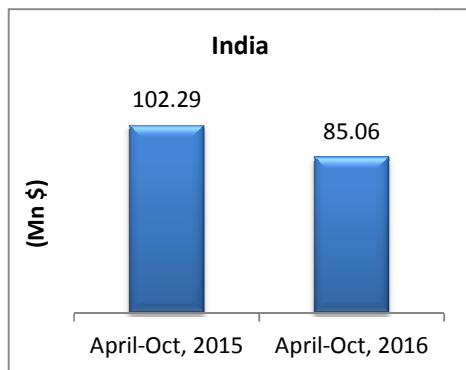
Rank	Country	% change
1	Turkey	12.12%
2	Pakistan	7.49%
3	India	13.47%
4	Portugal	-3.12%
5	China	0.68%
6	Netherlands	36.47%
7	Belgium	-2.41%
8	Germany	2.42%
9	Bangladesh	14.98%
10	Egypt	6.52%

10. Women's or girls" dresses of artificial fibres, excl. knitted or crocheted (62044400)



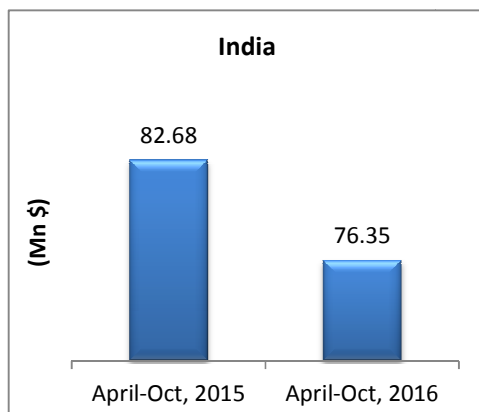
Rank	Country	% change
1	China	-3.14%
2	India	21.53%
3	Germany	62.94%
4	Spain	10.98%
5	Morocco	8.95%
6	Turkey	31.80%
7	Italy	-0.45%
8	France	3.14%
9	UK	28.33%
10	Poland	213.59%

11. Women's or girl dresses of synthetic fibres, excl. knitted or crocheted (62044300)



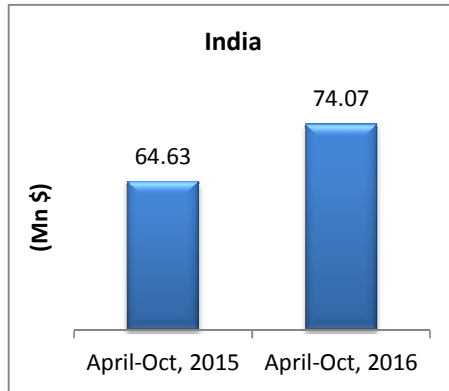
Rank	Country	% change
1	China	-3.37%
2	Germany	24.12%
3	UK	52.56%
4	Spain	-3.73%
5	India	-16.84%
6	Poland	11.00%
7	Italy	19.06%
8	Turkey	5.94%
9	Romania	-9.07%
10	Morocco	16.60%

12. Men's or boys shirts of cotton, knitted or crocheted, excl. nightshirts, T-shirts, singlets and other vests (61051000)



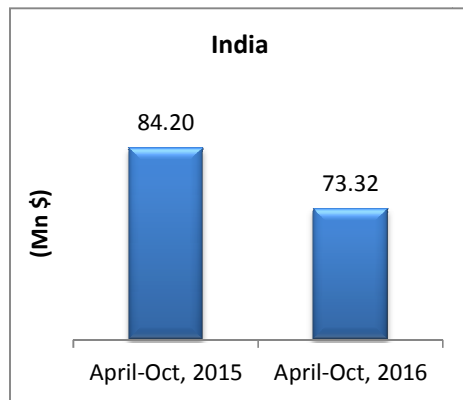
Rank	Country	% change
1	Bangladesh	1.64%
2	Germany	12.06%
3	China	-17.79%
4	Turkey	5.09%
5	Italy	-6.31%
6	India	-7.66%
7	Netherland	1.45%
8	France	4.72%
9	Belgium	-1.25%
10	Vietnam	14.21%

13. T-shirts, singlets and other vests of textile materials, knitted or crocheted, excl. cotton (61099020)



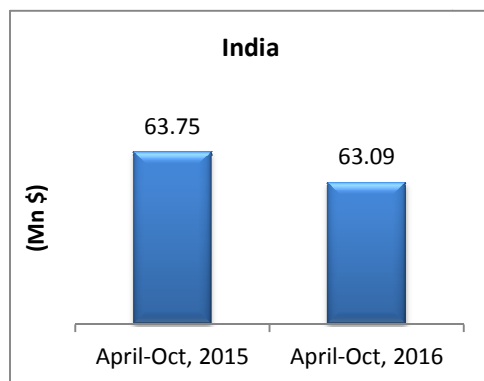
Rank	Country	% change
1	Turkey	-3.29%
2	China	-5.02%
3	Germany	5.89%
4	Belgium	16.59%
5	Bangladesh	12.68%
6	Spain	7.13%
7	Cambodia	26.11%
8	Netherlands	20.20%
9	France	10.72%
12	India	14.60%

14. Women's or girls dresses of cotton, excl. knitted or crocheted (62044200)



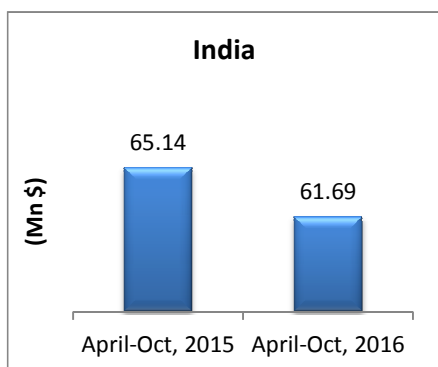
Rank	Country	% change
1	India	-12.93%
2	China	-8.88%
3	Germany	32.46%
4	Italy	3.33%
5	Turkey	22.31%
6	Spain	19.54%
7	UK	11.34%
8	Morocco	30.03%
9	France	-4.07%
10	Poland	47.09%

15. Men's or boys nightshirts and pajama's of cotton, knitted or crocheted, excl. vests and singlets (61072100)



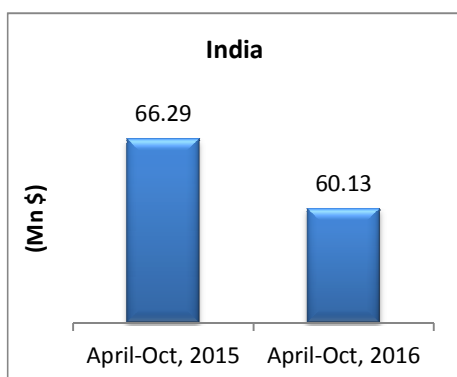
Rank	Country	% change
1	India	-1.04%
2	Bangladesh	11.11%
3	China	-15.25%
4	Germany	2.21%
5	Belgium	-16.17%
6	Turkey	-9.59%
7	Netherlands	-28.26%
8	France	13.25%
9	Poland	12.75%
10	Cambodia	11.64%

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



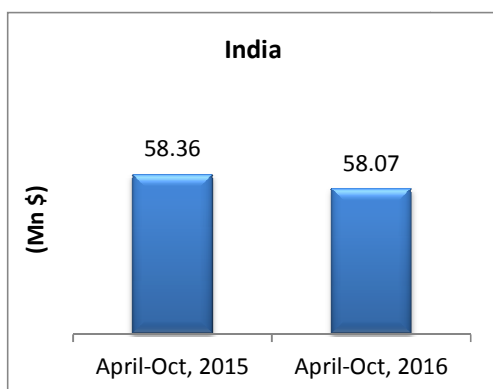
Rank	Country	% change
1	China	-16.07%
2	Bangladesh	2.09%
3	Germany	12.88%
4	Turkey	1.93%
5	Cambodia	7.77%
6	Netherlands	19.80%
7	Poland	56.19%
8	Belgium	11.70%
9	Italy	2.66%
12	India	-5.31%

17. Women's or girls garments, of man-made fibres, n.e.s., excl. knitted or crocheted (62114390)



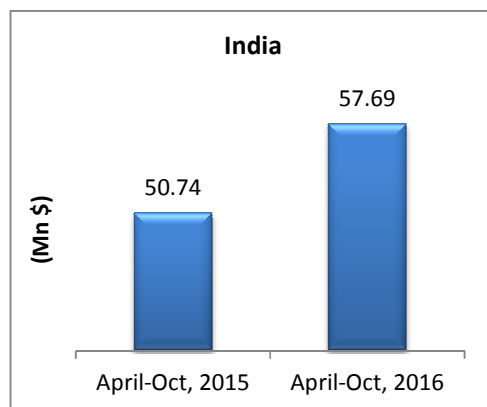
Rank	Country	% change
1	China	-11.18%
2	Germany	3.41%
3	India	-9.29%
4	Spain	2.62%
5	Morocco	10.47%
6	Poland	9.12%
7	Turkey	25.37%
8	UK	61.62%
9	France	9.14%
10	Netherlands	-19.23%

18. Men's or boys' jerseys, pullovers, cardigans, waistcoats, of cotton, knitted (61102091)



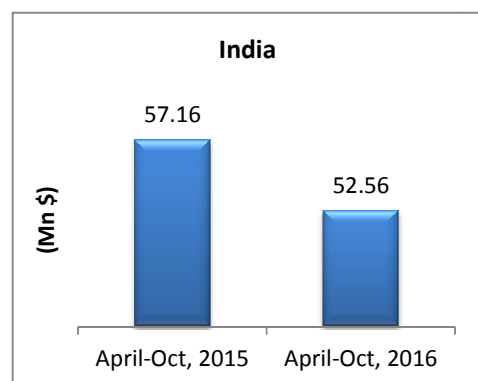
Rank	Country	% change
1	China	-7.59%
2	Bangladesh	2.59%
3	Netherlands	11.23%
4	Turkey	7.86%
5	Italy	0.15%
6	Pakistan	19.21%
7	Germany	2.00%
8	Denmark	-13.69%
9	Spain	14.08%
12	India	-0.50%

19. Men's or boys' trousers and breeches of cotton, excl. knitted or crocheted (62034235)



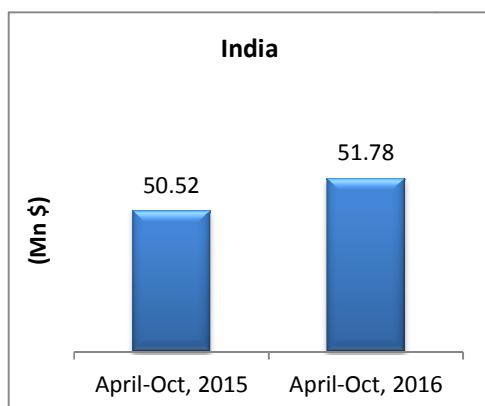
Rank	County	% change
1	Bangladesh	↑ 8.21%
2	Germany	↑ 23.12%
3	China	↓ -18.86%
4	Turkey	↑ 2.95%
5	Spain	↑ 11.29%
6	Tunisia	↓ -5.25%
7	Italy	↑ 3.98%
8	Belgium	↑ 8.20%
9	Pakistan	↑ 7.14%
13	India	↑ 13.70%

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



Rank	County	% change
1	China	↓ -5.23%
2	Bangladesh	↑ 15.90%
3	Netherlands	↑ 15.71%
4	Germany	↑ 15.02%
5	India	↓ -8.06%
6	Italy	↓ -3.82%
7	Cambodia	↑ 1.12%
8	France	↑ 3.21%
9	Austria	↑ 9.43%
10	Belgium	↑ 25.29%

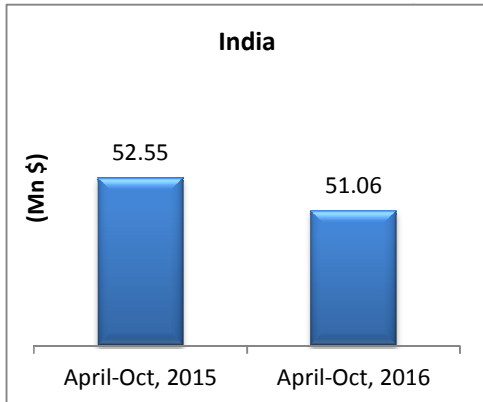
21. Women's or girls dresses of cotton, knitted or crocheted (61044200)



Rank	County	% change
1	Bangladesh	↑ 17.38%
2	Germany	↑ 31.61%
3	China	↓ -24.44%
4	Turkey	↓ -7.84%
5	India	↑ 2.49%
6	Italy	↑ 5.56%
7	Poland	↑ 32.85%
8	Spain	↑ 9.26%
9	Netherlands	↑ 33.91%
10	Portugal	↑ 28.33%



22. Table linen of cotton, excl. knitted or crocheted (63025100)



Rank	Country	% change
1	India	↓ -2.82%
2	Germany	↓ -2.75%
3	China	↓ -13.51%
4	Turkey	↓ -5.73%
5	Portugal	↓ -2.69%
6	Italy	↑ 21.32%
7	Egypt	↓ -8.98%
8	Pakistan	↑ 4.54%
9	Netherlands	↑ 127.98%
10	Tunisia	↑ -5.92%