

Apr-Dec' 2016

# TC MARKET/ COUNTRY REPORT

## EU Market Watch



Textiles Committee  
Government of India



## EU Market Watch (Apr-Dec'2016)

### 1.0 Introduction:

The EU is the largest T&C market of the world followed by US and imported \$ 250.15 billion during 2016. EU T&C imports from the rest of the world were \$ 184.78 billion during the same period in Apr-Dec'16 as compared to \$ 178.99 billion during the period Apr-Dec'15, registering a positive growth of 3.23%.

Tab-1:EU import of T&C

Period	Import (\$ Bn)
2016	250.15
April-Dec'15	178.99
April-Dec'16	184.78
Growth (%)	(+) 3.23

Being one of the largest markets, the major T&C exporting countries have always been trying to enhance their market share by increasing competitiveness leading to intense competition among the major players. India being one of the major exporters to EU and competing with countries like China, Germany and Italy etc there is need to study the month-wise trend and composition of the export both at aggregate and product level.

The **Textiles Committee Market/Country Report for April-December'2016** has tried to analyse India's position in EU market vis-à-vis competitors so as to provide feedback to the policy makers for appropriate policy decision and textile trade & industry for desirable business strategy. The highlights are as follows:

### 2.0 EU as an export destination (Apr-Dec'16):

#### 2.1 Extra-EU:

- EU T&C imports from the extra EU were \$ 95.21 billion in Apr-Dec'16.
- EU import from extra EU of T&C was tilted in favour of clothing products i.e. Chapter-61 (Knitted garment), Chapter-62 (Woven garment) and Chapter-63 (Other made-ups).



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- The clothing import from extra EU was to the tune of \$ 79.44 billion (83.96%) during Apr-Dec'16 whereas imports in textiles items were worth \$ 15.18 billion (16.04%).
- China was leading in textiles and clothing export in EU market with \$ 33.15 billion contributing 34.82 percent during Apr-Dec'16.
- Bangladesh was distant second with \$ 13.15 billion (13.81%) followed by Turkey with \$ 12.27 billion (12.89%), India \$ 6.51 billion (6.83%) and Pakistan \$ 4.25 billion (4.47%) during Apr-Dec'16.

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

Exporter	Apr-Dec' 15	Apr-Dec' 16	% Change
China	34.41	33.15	↓ -3.67%
Bangladesh	12.05	13.15	↑ 9.08%
Turkey	12.32	12.27	↓ -0.35%
India	6.42	6.51	↑ 1.38%
Pakistan	4.00	4.25	↑ 6.43%
RoW	25.04	25.88	↑ 3.35%
Extra-EU	94.23	95.21	↑ 1.03%

Source: Eurostat

## 2.2 Intra-EU:

- EU T&C imports from the intra EU were \$ 89.57 billion in Apr-Dec'16.
- EU import from intra EU of T&C was slightly tilted in favour of clothing products i.e. Chapter-61 (Knitted garment), Chapter-62 (Woven garment) and Chapter-63 (Other made-ups).
- The clothing import from intra EU was to the tune of \$ 61.91 billion (68.67%) during Apr-Dec'16 whereas imports in textiles items were worth \$ 28.24 billion (31.33%).
- Germany was leading in textiles and clothing export in intra EU market with \$ 17.85 billion contributing 19.93 percent during Apr-Dec'16.



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- Italy was distant second with \$ 12.43 billion (13.87%) followed by Netherlands with \$ 7.97 billion (8.90%), France \$ 6.77 billion (7.56%) and Spain \$ 6.40 billion (7.14%) during Apr-Dec'16.

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

Exporter	Apr-Dec' 15	Apr-Dec' 16	% Change
Germany	16.62	17.85	↑ 7.41%
Italy	12.12	12.43	↑ 2.53%
Netherlands	7.27	7.97	↑ 9.57%
France	6.68	6.77	↑ 1.47%
Spain	5.58	6.40	↑ 8.62%
RoEU	36.19	38.16	↑ 5.46%
Intra-EU	84.57	89.57	↑ 5.68%

Source: Eurostat

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

- India's T&C export to EU during Apr-Dec' 2016 was \$ 6.51 billion as compared to \$ 6.42 billion during the same period of the previous year, which accounts about 26 percent of India's total T&C export to the world.
- India's aggregate export of textiles to EU (Chapter 50 to 60) was \$ 1.34 billion during Apr-Dec'16 which is 15 percent of India's total textiles exports to the world.
- India's aggregate export of clothing to EU (Chapter 61 to 63) was \$ 5.17 billion during Apr-Dec'16 which is 33 percent of India's total clothing exports to the world.
- Top 21 Products (whose share is more than 1%) contributed 50.18 percent to the export basket in EU market during Apr-Dec'16.
- The share of these top 21 products was 49.87 percent in the same period of 2015.



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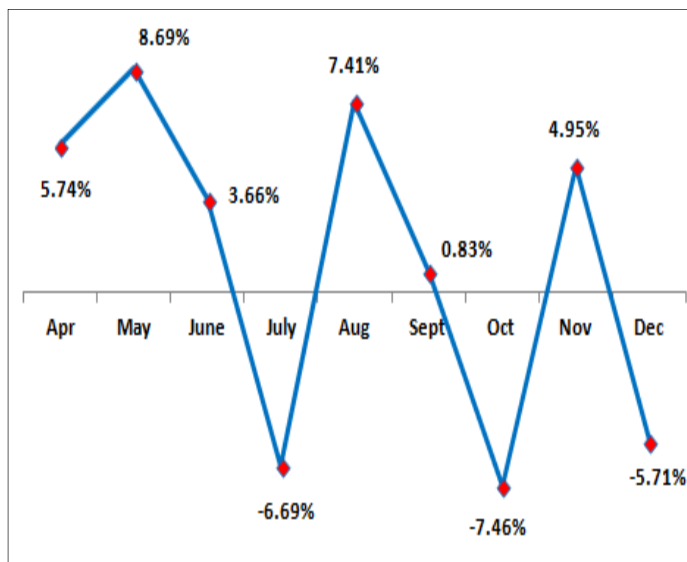
(April-December'2016)

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

Month	April-December		
	2015	2016	% Change
April	845.11	893.59	5.74
May	717.29	779.62	8.69
June	755.94	783.58	3.66
July	793.74	740.63	-6.69
August	723.49	777.10	7.41
September	696.36	702.15	0.83
October	675.77	625.36	-7.46
November	591.73	621.00	4.95
December	618.07	582.77	-5.71
Apr-Nov	6417.48	6505.8	1.38

Source: Eurostat

Fig-1  
Change in the exports



## Comments

- The exports growth was highest in May 2016 as compared to the same period in 2015.





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### **3.1 India's Top Performing Products in EU market (Apr-Dec'16)**

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

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

Products	Descriptions	Apr-Dec' 15	Apr-Dec' 16	% change
61091000	T-shirts, singlets and other vests of cotton, knitted	547.54	551.86	0.79
61112090	Babies' garments accessories, of cotton, knitted	216.48	253.69	17.19
62063000	Women's or girls blouses, shirts of cotton, not knitted	191.15	195.07	2.05
63053219	Flexible intermediate bulk containers, of polyethylene, woven	164.11	169.61	3.35
61046200	Women's or girls trousers, bib and brace overalls of cotton, knitted	147.43	158.31	7.38
63026000	Toilet linen and kitchen linen, of terry towelling of cotton	122.55	131.11	6.99
62044400	Women's or girls dresses of artificial fibres, not knitted	84.74	100.79	18.93
61099020	T-shirts, singlets of artificial fibres, knitted	79.69	88.92	11.59
62034235	Men's or boys' trousers of cotton, woven	61.84	68.93	11.46
Total		1615.53	1718.28	6.36

Source: Eurostat



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

Products	Descriptions	Apr-Dec' 15	Apr-Dec' 16	% change
62064000	Women's or girls blouses, shirts of man-made fibres, not knitted	313.00	311.49	-0.48
62052000	Men's or boys shirts of cotton, not knitted	232.66	223.53	-3.92
61083100	Women's or girls nightdresses of cotton, knitted	132.50	130.24	-1.70
62044300	Women's or girls dresses of synthetic fibres , not knitted	121.18	100.73	-16.88
61051000	Men's or boys shirts of cotton, knitted or crocheted	100.47	90.61	-9.81
62044200	Women's or girls dresses of cotton, not knitted	95.76	84.22	-12.04
61102099	Women's or girls' jerseys, pullovers, of cotton, knitted	81.39	77.33	-4.99
61072100	Men's or boys nightshirts of cotton, knitted or crocheted	76.65	75.42	-1.60
61102091	Men's or boys' jerseys, pullovers, of cotton, knitted	71.98	71.63	-0.48
61071100	Men's or boys underpants and briefs of cotton, knitted	72.32	66.19	-8.47
62114390	Women's or girls' garments, of m-m fibres, woven	74.02	65.94	-10.92
63025100	Table linen of cotton, not knitted	66.37	63.79	-3.89
Total		1438.28	1361.12	-5.36

Source: Eurostat

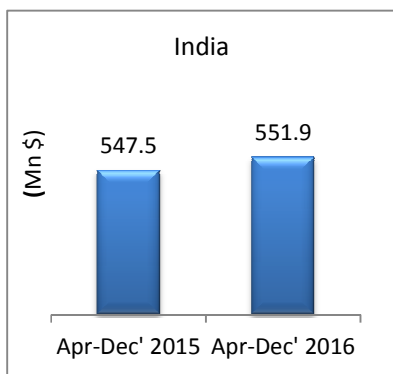


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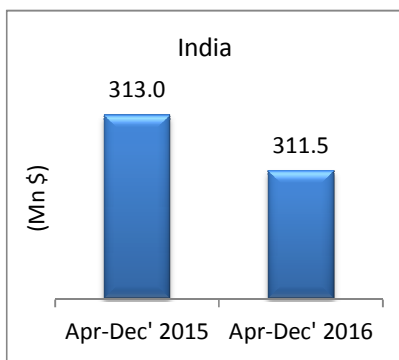
## 4.0 India's Product wise Performance vis-à-vis Competitors (Apr-Dec'16) over previous year

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



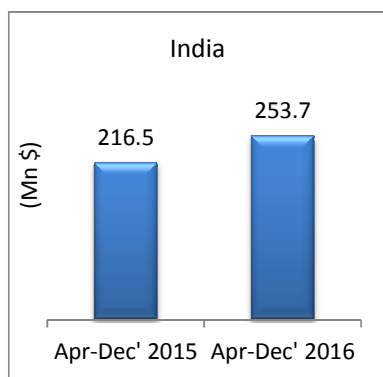
Rank	Country	% change
1	Bangladesh	2.55%
2	Germany	4.38%
3	Turkey	1.01%
4	India	0.79%
5	Netherlands	12.68%
6	Belgium	4.18%
7	China	-15.60%
8	Italy	15.91%
9	UK	13.73%
10	Portugal	2.84%

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



Rank	Country	% change
1	China	-3.51%
2	India	-0.48%
3	Germany	18.04%
4	Spain	1.53%
5	Turkey	-10.26%
6	Morocco	2.95%
7	Romania	-12.10%
8	Bangladesh	18.10%
9	Poland	16.69%
10	UK	15.94%

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



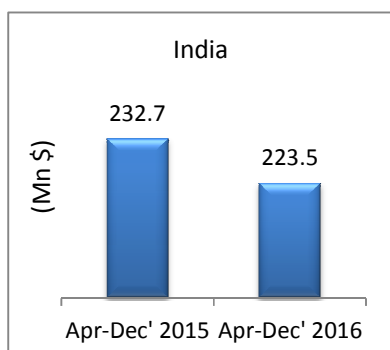
Rank	Country	% change
1	China	-11.22%
2	Bangladesh	7.56%
3	India	17.19%
4	Germany	58.15%
5	France	3.50%
6	Poland	45.22%
7	Turkey	13.00%
8	Netherlands	29.49%
9	Sri Lanka	2.72%
10	Spain	14.04%





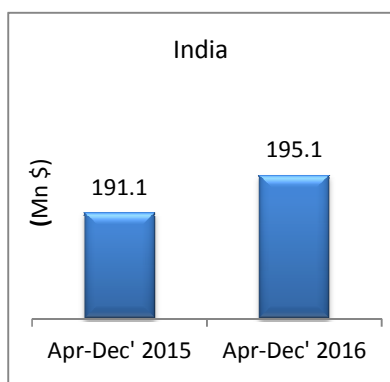
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### 4. Men's or boys shirts of cotton, not knitted (62052000)



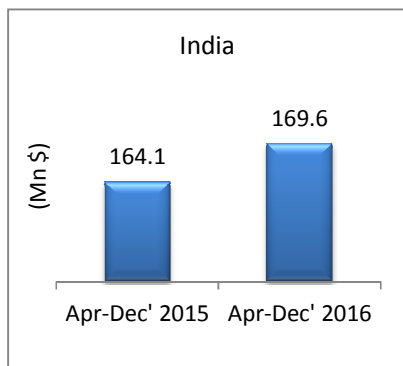
Rank	Country	% change
1	Bangladesh	-0.25%
2	China	-19.73%
3	Germany	0.07%
4	Turkey	-7.26%
5	India	-3.92%
6	Italy	-8.10%
7	Spain	1.96%
8	Netherlands	-4.07%
9	Vietnam	6.02%
10	UK	-7.49%

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



Rank	Country	% change
1	India	2.05%
2	Bangladesh	1.26%
3	China	-11.41%
4	Germany	14.88%
5	Spain	48.38%
6	Turkey	1.51%
7	Italy	3.17%
8	Morocco	74.52%
9	Poland	43.99%
10	Netherlands	16.72%

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



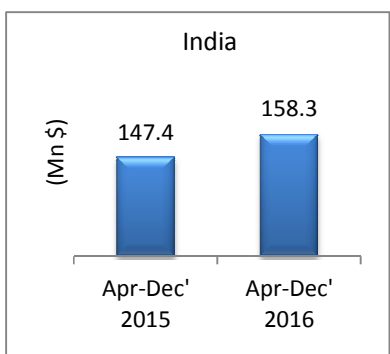
Rank	Country	% change
1	India	3.35%
2	Turkey	1.00%
3	Bangladesh	-3.95%
4	Belgium	19.38%
5	Romania	-1.79%
6	Netherlands	4.78%
7	Czech Rep.	16.29%
8	Germany	15.11%
9	China	-10.75%
10	Serbia	0.44%



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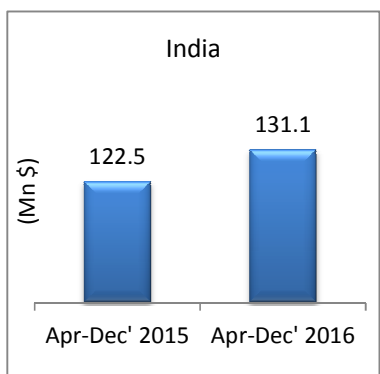
(April-December'2016)

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



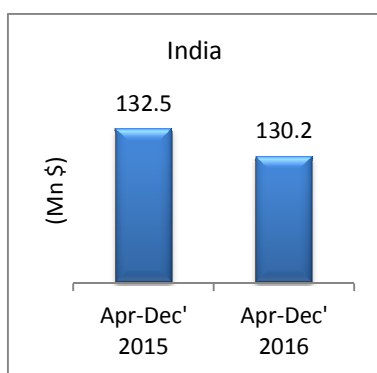
Rank	Country	% change
1	Bangladesh	8.70%
2	Germany	23.16%
3	China	-17.48%
4	India	7.38%
5	Cambodia	14.40%
6	Belgium	9.62%
7	Turkey	-22.82%
8	France	12.23%
9	Netherland	16.27%
10	Poland	47.70%

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



Rank	Country	% change
1	Turkey	12.36%
2	Pakistan	8.50%
3	India	6.99%
4	Portugal	-5.46%
5	China	-0.20%
6	Netherlands	28.95%
7	Belgium	-11.13%
8	Germany	3.88%
9	Bangladesh	19.45%
10	Egypt	2.91%

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



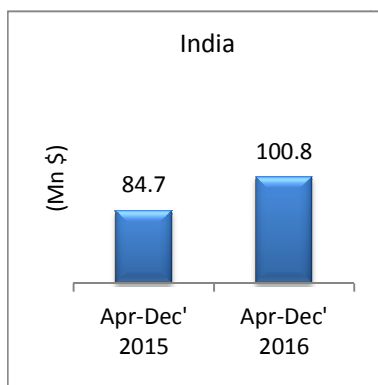
Rank	Country	% change
1	India	-1.70%
2	Bangladesh	6.59%
3	China	-26.04%
4	Germany	-6.49%
5	Turkey	-1.85%
6	Belgium	-7.57%
7	Netherlands	1.01%
8	Poland	21.83%
9	Cambodia	-1.89%
10	Italy	2.48%



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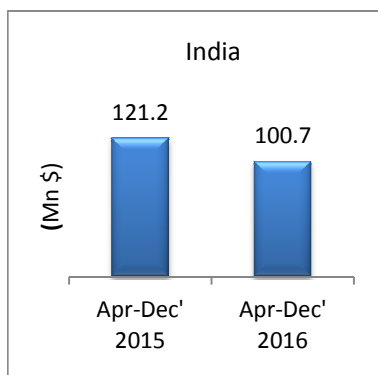
(April-December'2016)

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



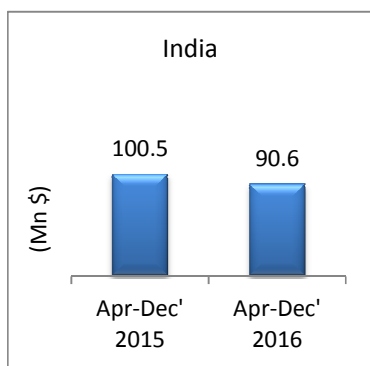
Rank	Country	% change
1	China	-0.75%
2	India	18.93%
3	Germany	60.91%
4	Spain	8.40%
5	Morocco	4.09%
6	Italy	0.44%
7	Turkey	28.66%
8	France	-1.66%
9	UK	30.30%
10	Poland	20.85%

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



Rank	Country	% change
1	China	-2.31%
2	Germany	25.07%
3	UK	40.98%
4	Spain	-2.27%
5	Italy	20.97%
6	Poland	9.47%
7	India	-16.88%
8	Turkey	1.39%
9	Romania	-12.14%
10	Morocco	11.29%

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



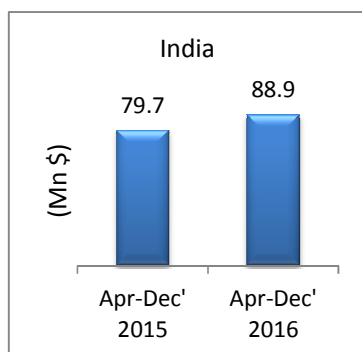
Rank	Country	% change
1	Bangladesh	2.33%
2	Germany	7.00%
3	China	-15.64%
4	Turkey	3.38%
5	Italy	-13.43%
6	India	-9.81%
7	Netherlands	3.42%
8	France	4.66%
9	Vietnam	12.43%
10	Belgium	0.46%



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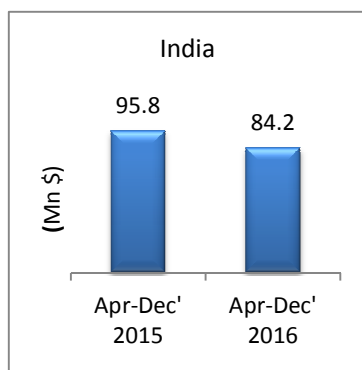
(April-December'2016)

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



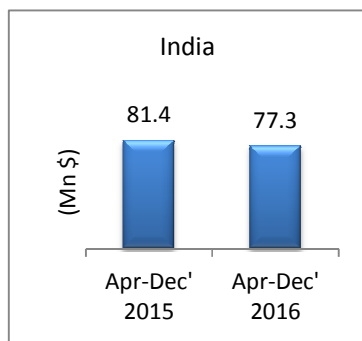
Rank	Country	% change
1	Turkey	-4.31%
2	China	-5.86%
3	Germany	6.36%
4	Belgium	14.05%
5	Bangladesh	12.69%
6	Spain	6.17%
7	Cambodia	25.43%
8	France	10.33%
9	Netherlands	21.52%
12	India	11.59%

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



Rank	Country	% change
1	China	-8.55%
2	India	-12.04%
3	Germany	30.40%
4	Italy	1.99%
5	Spain	16.47%
6	Turkey	11.52%
7	UK	6.67%
8	Morocco	26.00%
9	France	-6.24%
10	Bangladesh	70.06%

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

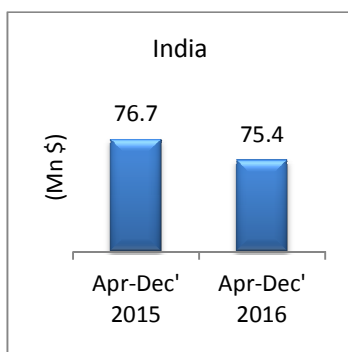


Rank	Country	% change
1	China	-13.93%
2	Bangladesh	3.37%
3	Germany	15.94%
4	Turkey	-2.50%
5	Cambodia	4.99%
6	Netherlands	22.68%
7	Poland	60.24%
8	Belgium	13.37%
9	Italy	-1.69%
13	India	-4.99%



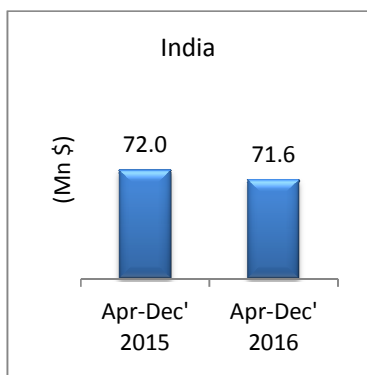
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### 16. Men's or boys nightshirts of cotton, knitted or crocheted (61072100)



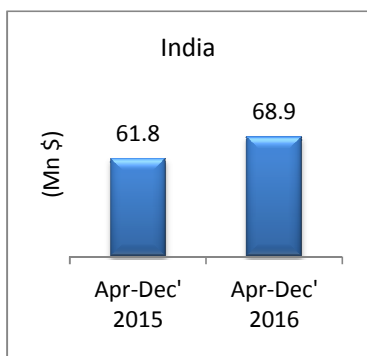
Rank	Country	% change
1	India	-1.60%
2	Bangladesh	5.41%
3	China	-13.73%
4	Germany	-2.62%
5	Belgium	-18.80%
6	Netherlands	-7.63%
7	Turkey	-7.05%
8	France	10.88%
9	Poland	16.41%
10	Italy	4.08%

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



Rank	Country	% change
1	China	-7.49%
2	Bangladesh	3.72%
3	Netherlands	13.02%
4	Turkey	5.74%
5	Italy	0.02%
6	Germany	3.17%
7	Pakistan	16.74%
8	Denmark	-5.49%
9	Spain	11.24%
13	India	-0.48%

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



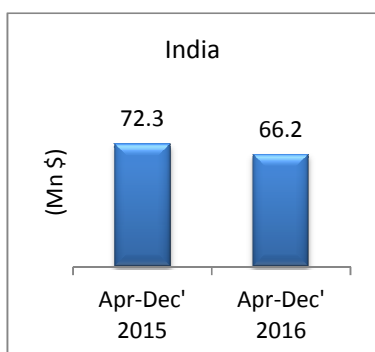
Rank	Country	% change
1	Bangladesh	7.68%
2	Germany	23.46%
3	China	-19.33%
4	Turkey	-2.86%
5	Spain	8.58%
6	Italy	4.28%
7	Tunisia	-11.34%
8	Pakistan	4.95%
9	Belgium	6.07%
13	India	11.46%



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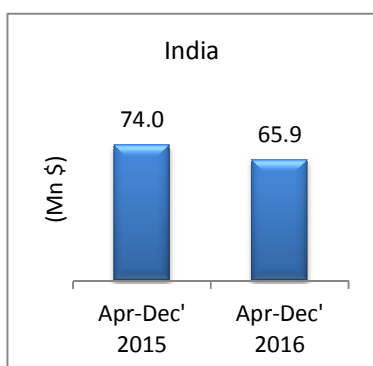
(April-December'2016)

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



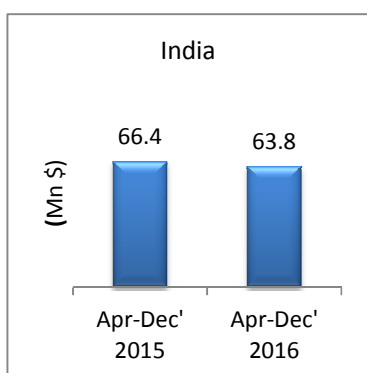
Rank	Country	% change
1	China	-4.90%
2	Bangladesh	17.78%
3	Netherlands	16.08%
4	Germany	14.83%
5	India	-8.47%
6	Sri Lanka	-15.92%
7	Italy	-6.95%
8	Cambodia	6.73%
9	France	7.23%
10	Austria	11.65%

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



Rank	Country	% change
1	China	-12.08%
2	Germany	1.62%
3	Spain	1.96%
4	India	-10.92%
5	Morocco	10.72%
6	Poland	6.86%
7	UK	53.24%
8	Turkey	19.57%
9	France	2.63%
10	Netherlands	-15.22%

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



Rank	Country	% change
1	India	-3.89%
2	Germany	-0.76%
3	China	-2.04%
4	Turkey	-8.38%
5	Portugal	1.02%
6	Italy	2.87%
7	Egypt	-10.14%
8	Pakistan	0.25%
9	Netherlands	88.91%
10	Tunisia	-9.68%