

US Market Watch (Apr-Nov'2016)

1.0 Introduction:

The US is the second largest T&C market of the world after EU and imported \$ 119.64 billion during 2015. The US T&C imports from the rest of the world were \$ 82.93 billion during the period Apr-Nov'15 as compared to \$ 78.07 billion during the same period in 2016. The total T&C imports during the months Apr-Nov of 2016 has witnessed a negative growth of -5.86% over the same period during 2015.

Tab-1:US import of T&C

Period	Import (\$ Bn)
2015	119.64
April-Nov'15	82.93
April-Nov'16	78.07
Growth (%)	(-) 5.86

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 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 **TC Market/Country Report for April-November'2016** has tried to analyse India's position in US 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 US as an export destination (Apr-Nov'16)

- US T&C imports from the rest of the world were \$ 78.07 billion in Apr-Nov'16.
- US import 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 imports from the world was to the tune of \$ 68 billion (87.11%) during Apr-Nov'16 and imports in textiles items is worth \$ 10.07 billion (12.89%),
- China is leading in textiles and clothing export in US market with \$ 29.17 billion, contributes 37.36 percent during Apr-Nov'16.

- Vietnam is distant second with \$ 7.87 billion followed by India with \$ 5.22 billion, Mexico \$ 3.57 billion and Indonesia \$ 3.43 billion during Apr-Nov'16.
- Vietnam's share in the overall export of T&C is 10.08% followed by India (6.68%), Mexico (4.57%) and Indonesia (4.39%) etc.

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

Exporter	Apr-Nov' 15	Apr-Nov' 16	% Change
China	31.70	29.17	↓ -7.99
Viet Nam	7.86	7.87	↑ 0.15
India	5.34	5.22	↓ -2.37
Mexico	3.71	3.57	↓ -3.64
Indonesia	3.65	3.43	↓ -6.08
RoW	30.67	28.81	↓ -6.06
World	82.93	78.07	↓ -5.86

Source:ITC

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

- India's T&C export to US during Apr-Nov'16 is \$ 5.22 billion as compared to \$ 5.34 billion during the same period of the previous year, which accounts about 21 percent of India's total T&C export to the world.
- The export has declined by 2.37% over the same period of previous year.
- India's aggregate export of textiles to US (Chapter 50 to 60) is \$ 1.14 billion during Apr-Nov'16 which is 11 percent of India's total textiles exports to the world.
- India's aggregate export of clothing to US (Chapter 61 to 63) is \$ 4.08 billion during Apr-Nov'16 which is 27 percent of India's total clothing exports to the world.
- Top 20 Products (whose share is more than 1%) contributed 46.94 percent to the export basket in US market during Apr-Nov'16.

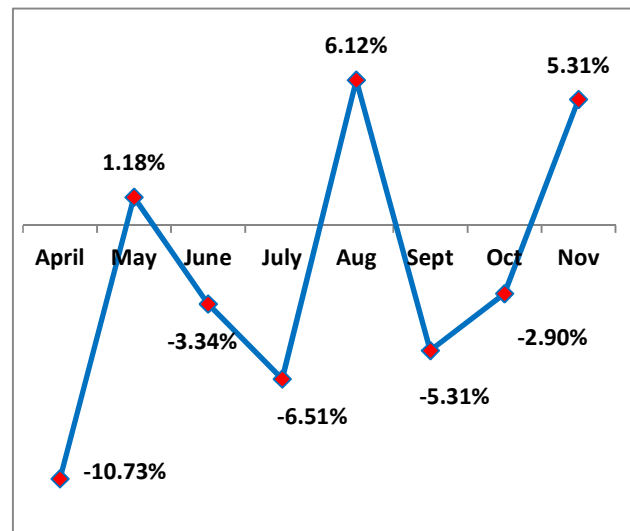
- The share of these top 20 products is 46.18 percent in the same period of 2015.

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

Month	April-November		
	2015	2016	% Change
April	768.82	686.33	-10.73
May	659.23	666.98	1.18
June	662.53	640.41	-3.34
July	708.16	662.07	-6.51
August	640.92	680.16	6.12
September	659.71	624.70	-5.31
October	658.28	639.17	-2.90
November	585.35	616.41	5.31
Apr-Nov	5343.01	5216.23	-2.37

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

3.1 India's Top Performing Products in US market (Apr–Nov'16)

- Major 8 products have experienced positive growth during April – November, 2016 as compared to the same period during 2015

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

Products	Descriptions	Apr-Nov' 15	Apr-Nov' 16	% change
5703900000	carpets and other textile floor coverings, of other textile	51.93	59.66	14.89
6105100010	men's shirts, knitted or crocheted, of cotton	84.82	85.71	1.05
6110202069	men's or boys' pullovers, of cotton containing less than 36 percent by weight	152.29	158.75	4.25
6204444010	women's dresses, of artificial fibers, not knitted, containing less than 36 percent by weight	57.98	76.22	31.45
6206403030	women's blouses, shirts, of man-made fibers, not knitted	113.96	120.98	6.16
6212109020	brassieres, not containing lace or net or embroidery, of man-made fibers, whether or not knitted	59.92	84.41	40.88
6302319010	other bed linen not printed, knitted, or napped, cotton pillowcases, not containing embroidery	103.04	103.26	0.21
6302600020	toilet linen and kitchen linen, of terry toweling or similar terry fabrics, of cotton	434.07	442.41	1.92
Total		1058.00	1131.38	6.94

Source: ITC

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

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

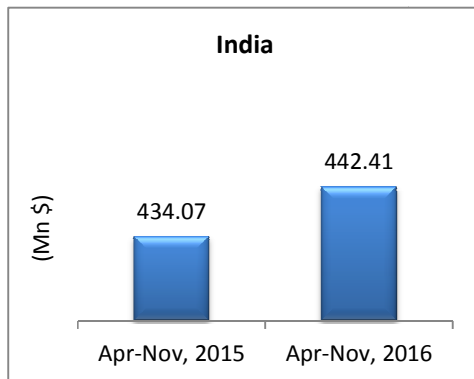
Table-5: Top Products having negative growth (Mn \$)

Products	Descriptions	Apr-Nov' 15	Apr-Nov' 16	% change
5407200000	woven fabrics of synthetic filament yarn	101.34	96.01	-5.25
5701104000	carpets and other textile floor coverings, of wool	102.63	95.97	-6.49
5703102000	carpets and other textile floor coverings, tufted, of wool	115.33	111.45	-3.37
6107110010	men's underpants and briefs, knitted, of cotton	88.16	79.18	-10.19
6110202079	women's or girls' pullovers, of cotton containing less than 36 percent by weight	119.04	114.47	-3.84
6205202051	men's shirts of cotton, with two or more colors in the warp, not knitted	74.57	63.22	-15.22
6205202066	men's shirts of cotton, not knitted	56.05	55.98	-0.14
6206303011	women's blouses, shirts, of cotton, with two or more colors in the warp	83.14	81.21	-2.32
6206303041	women's blouses, shirts, of cotton, not knitted	96.07	79.18	-17.58
6302219020	other bed linen: printed, not knit, cotton sheets, not napped, not containing embroidery	81.08	59.24	-26.94
6302319020	other bed linen, not printed/knit/napped, cotton sheets, not containing embroidery	416.31	407.59	-2.09
6305320010	sacks and bags, of man-made textile materials	75.92	73.63	-3.01
Total		1409.63	1317.12	-6.56

Source: ITC

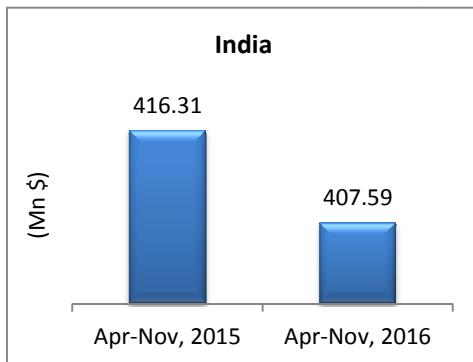
4.0 India's Product wise Performance vis-à-vis Competitors (Apr-Nov'16) over previous year

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



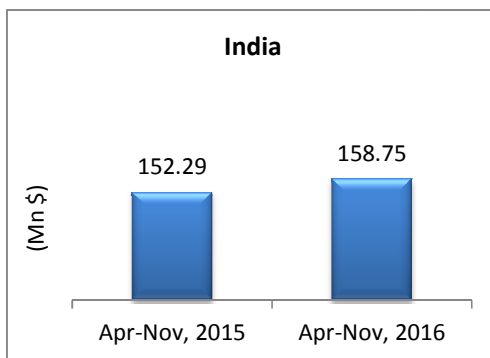
Rank	Country	% Change
1	India	↑ 1.92%
2	Pakistan	↓ -2.84%
3	China	↓ -10.98%
4	Turkey	↑ 19.76%
5	Bangladesh	↓ -14.86%
6	Colombia	↑ 3.37%
7	Canada	↓ -7.32%
8	Portugal	↓ -3.33%
9	El Salvador	↓ -16.54%
10	Brazil	↑ 3.71%

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



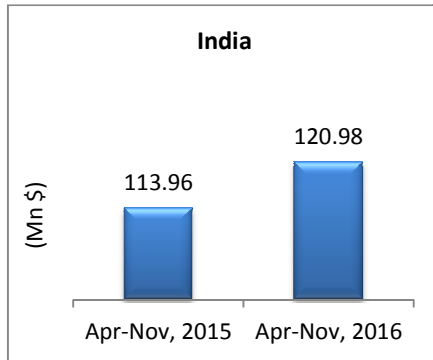
Rank	Country	% Change
1	India	↓ -2.09%
2	China	↓ -18.48%
3	Pakistan	↓ -4.55%
4	Bahrain	↓ -0.13%
5	Italy	↑ 18.55%
6	Portugal	↓ -28.85%
7	Cambodia	↑ -23.96%
8	Bangladesh	↓ -3.52%
9	Egypt	↓ -1.65%
10	Turkey	↑ 31.74%

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



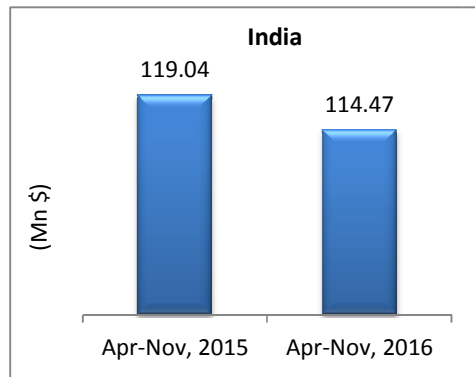
Rank	Country	% Change
1	China	↓ -9.44%
2	Viet Nam	↑ 0.64%
3	India	↑ 4.25%
4	Honduras	↓ -14.26%
5	Bangladesh	↓ -9.12%
6	Indonesia	↓ -24.39%
7	Nicaragua	↓ -17.29%
8	Haiti	↓ -26.26%
9	Guatemala	↓ -24.14%
10	Pakistan	↓ -12.18%

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



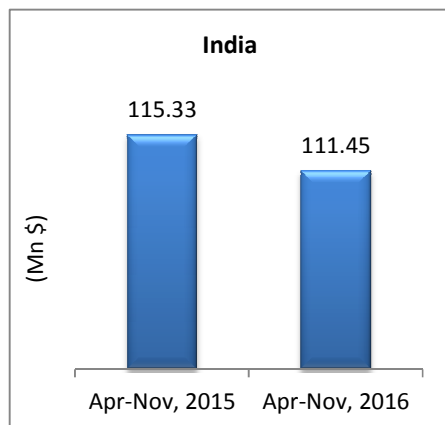
Rank	Country	% Change
1	China	3.82%
2	Indonesia	-3.47%
3	Viet Nam	12.64%
4	India	6.16%
5	Bangladesh	82.98%
6	Philippines	-4.93%
7	Mexico	74.78%
8	Egypt	-11.42%
9	Turkey	-33.49%
10	Honduras	-1.20%

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



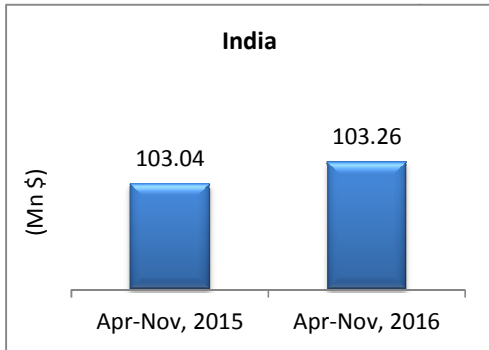
Rank	Country	% Change
1	China	-19.48%
2	Viet Nam	-7.94%
3	Indonesia	-14.40%
4	India	-3.84%
5	Cambodia	-30.80%
6	Guatemala	-27.69%
7	Nicaragua	6.33%
8	Bangladesh	6.84%
9	Sri Lanka	0.13%
10	Jordan	16.74%

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



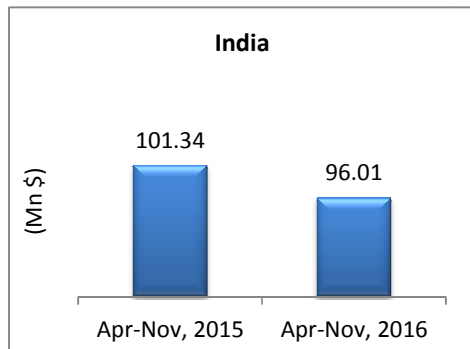
Rank	Country	% Change
1	India	-3.37%
2	China	-19.43%
3	Thailand	73.56%
4	New Zealand	18.04%
5	Netherlands	57.50%
6	Italy	56.43%
7	Canada	-12.34%
8	Sweden	-13.42%
9	Belgium	41.59%
10	Hong Kong	-4.15%

7. Other bed linen not printed, knitted, or napped, cotton pillowcases, not containing embroidery (6302319010)



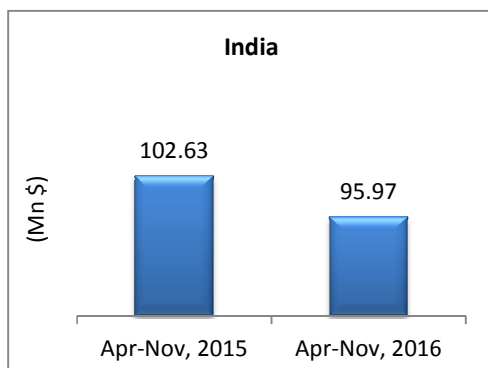
Rank	Country	% Change
1	India	0.21%
2	China	-14.79%
3	Pakistan	-8.47%
4	Bahrain	-19.49%
5	Italy	41.08%
6	Bangladesh	-2.18%
7	Portugal	-34.51%
8	Cambodia	-18.49%
9	Israel	143.85%
10	Turkey	19.68%

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



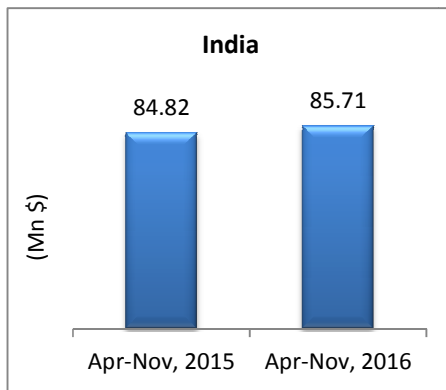
Rank	Country	% Change
1	China	-3.29%
2	Canada	-5.99%
3	India	-5.25%
4	Korea	-7.31%
5	Mexico	-14.25%
6	Germany	-19.13%
7	Turkey	-25.12%
8	Taipei	-12.16%
9	Netherlands	-3.21%
10	Japan	-19.35%

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



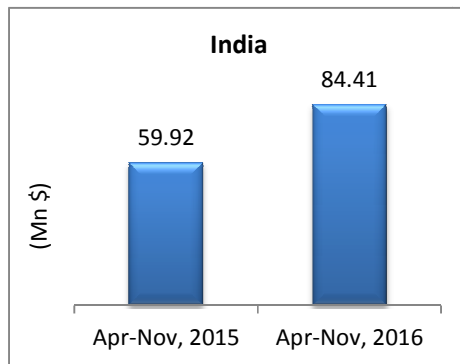
Rank	Country	% Change
1	India	-6.49%
2	Pakistan	-20.94%
3	Nepal	16.78%
4	Turkey	-18.45%
5	China	-20.67%
6	Afghanistan	36.98%
7	Morocco	-14.97%
8	Egypt	-62.67%
9	Hong Kong	18.52%
10	Russia	24.62%

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



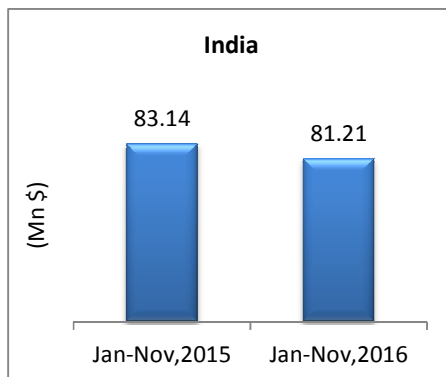
Rank	Country	% Change
1	Viet Nam	↑ 4.21%
2	India	↑ 1.05%
3	China	↓ -26.22%
4	Indonesia	↓ -5.40%
5	Pakistan	↓ -31.60%
6	Peru	↓ -15.25%
7	Pakistan	↓ -11.27%
8	Bangladesh	↓ -25.37%
9	Cambodia	↓ -22.12%
10	Sri Lanka	↓ 38.52%

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



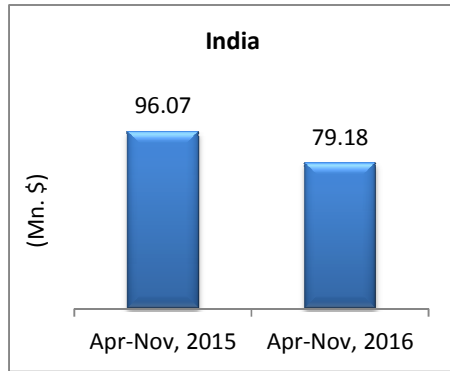
Rank	Country	% Change
1	China	↓ -10.34%
2	Sri Lanka	↑ 2.20%
3	Viet Nam	↑ 188.04%
4	India	↑ 40.88%
5	Dominican Rep.	↓ -8.90%
6	Honduras	↓ -3.72%
7	Indonesia	↓ -23.60%
8	El Salvador	↑ 8.90%
9	Thailand	↓ -24.59%
10	Cambodia	↓ -12.06%

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



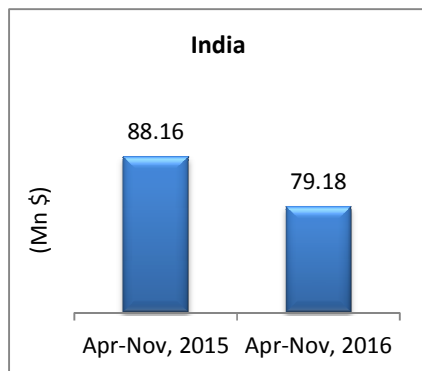
Rank	Country	% Change
1	India	↓ -2.32%
2	China	↑ 1.62%
3	Indonesia	↓ -7.76%
4	Sri Lanka	↑ 20.53%
5	Viet Nam	↓ -38.64%
6	Thailand	↓ -10.42%
7	Bangladesh	↓ -12.44%
8	El Salvador	↑ 22.71%
9	Cambodia	↓ -10.49%
10	Italy	↑ 47.42%

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



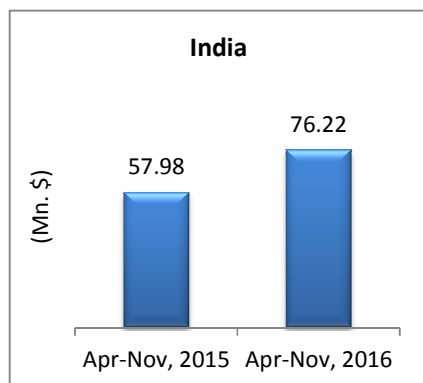
Rank	Country	% Change
1	China	20.61%
2	India	31.45%
3	Indonesia	76.97%
4	Viet Nam	109.14%
5	Italy	4.82%
6	France	2.58%
7	Turkey	89.36%
8	Cambodia	45.75%
9	UK	14.20%
10	Romania	20.06%

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



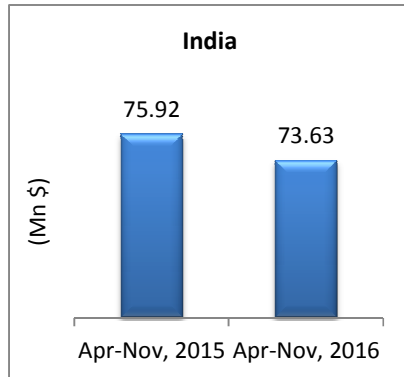
Rank	Country	% Change
1	Viet Nam	-4.20%
2	El Salvador	7.47%
3	India	-10.19%
4	Honduras	-7.00%
5	China	-15.96%
6	Sri Lanka	-9.13%
7	Bangladesh	-18.75%
8	Cambodia	-23.21%
9	Pakistan	-4.25%
10	Thailand	-17.61%

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



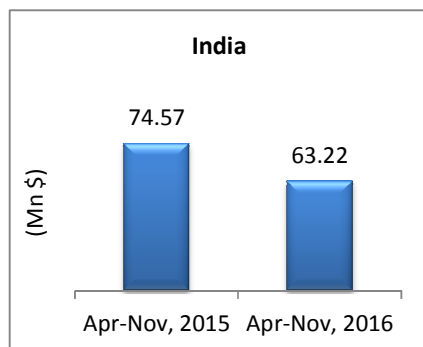
Rank	Country	% Change
1	China	-2.51%
2	India	-17.58%
3	Indonesia	-13.11%
4	Bangladesh	20.09%
5	Viet Nam	-7.46%
6	Italy	0.74%
7	Thailand	-30.25%
8	Sri Lanka	8.43%
9	Mexico	18.07%
10	Honduras	214.15%

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



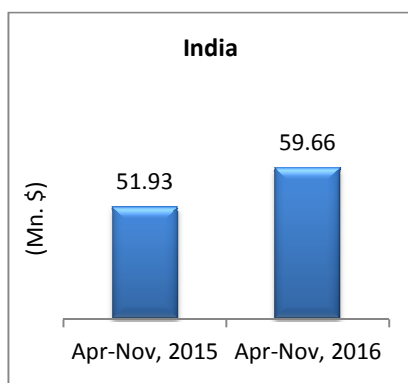
Rank	Country	% Change
1	India	-3.01%
2	China	-13.56%
3	Mexico	-4.16%
4	Turkey	-14.33%
5	Indonesia	-63.53%
6	Viet Nam	56.53%
7	Thailand	-69.42%
8	Cambodia	33.33%
9	Korea, Rep.	48.00%
10	Hong Kong.	109.13%

17. Men's shirts of cotton, with two or more colors in the warp and/or the filling, not knitted (6205202051)



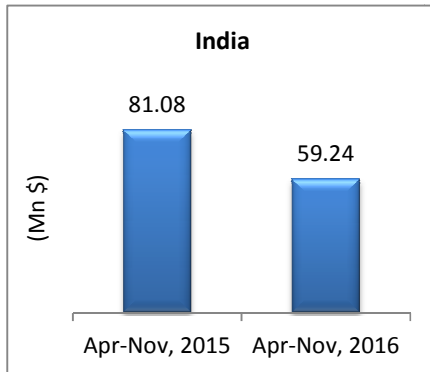
Rank	Country	% Change
1	Bangladesh	-0.35%
2	China	-2.58%
3	Viet Nam	18.81%
4	Mauritius	-23.01%
5	India	-15.22%
6	Sri Lanka	-1.53%
7	Indonesia	-15.49%
8	Philippines	-17.30%
9	El Salvador	-26.46%
10	Malaysia	-48.59%

18. Carpets and other textile floor coverings, tufted, whether or not made up: of other textile (5703900000)



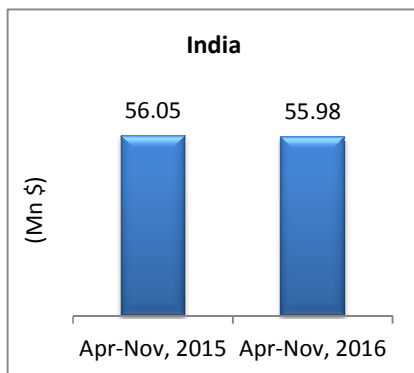
Rank	Country	% Change
1	India	14.89%
2	China	-16.14%
3	Hong Kong	6.38%
4	Portugal	2.92%
5	Turkey	184.77%
6	Thailand	-3.95%
7	Italy	314.86%
8	Spain	-84.06%
9	Netherlands	-29.79%
10	Pakistan	-48.35%

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



Rank	Country	% Change
1	China	28.71%
2	India	-26.94%
3	Pakistan	-20.59%
4	Bahrain	11.17%
5	Israel	-6.59%
6	Portugal	-15.82%
7	Mexico	173.35%
8	Thailand	-32.67%
9	Italy	53.91%
10	Turkey	53.20%

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



Rank	Country	% Change
1	China	-16.35%
2	Bangladesh	3.80%
3	India	-0.14%
4	Viet Nam	2.75%
5	Indonesia	-11.87%
6	Italy	-17.48%
7	Mexico	-15.42%
8	Turkey	-0.29%
9	El Salvador	78.14%
10	Mauritius	45.72%