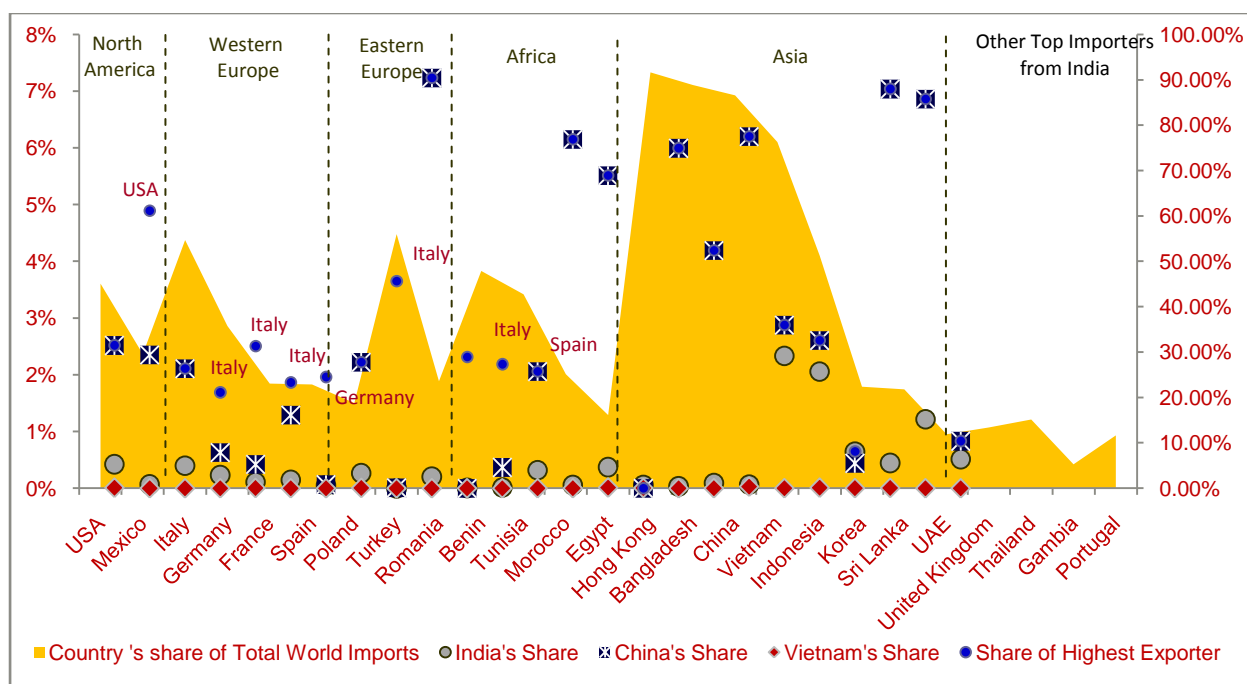


## Textiles & Garments Industry – Market Composition

In this section, the top exports markets for each segment within Textiles & Garments Industry have been identified and then contribution of Indian vis-à-vis other competing countries in each market's imports is mapped

### 1. Cotton Fabric



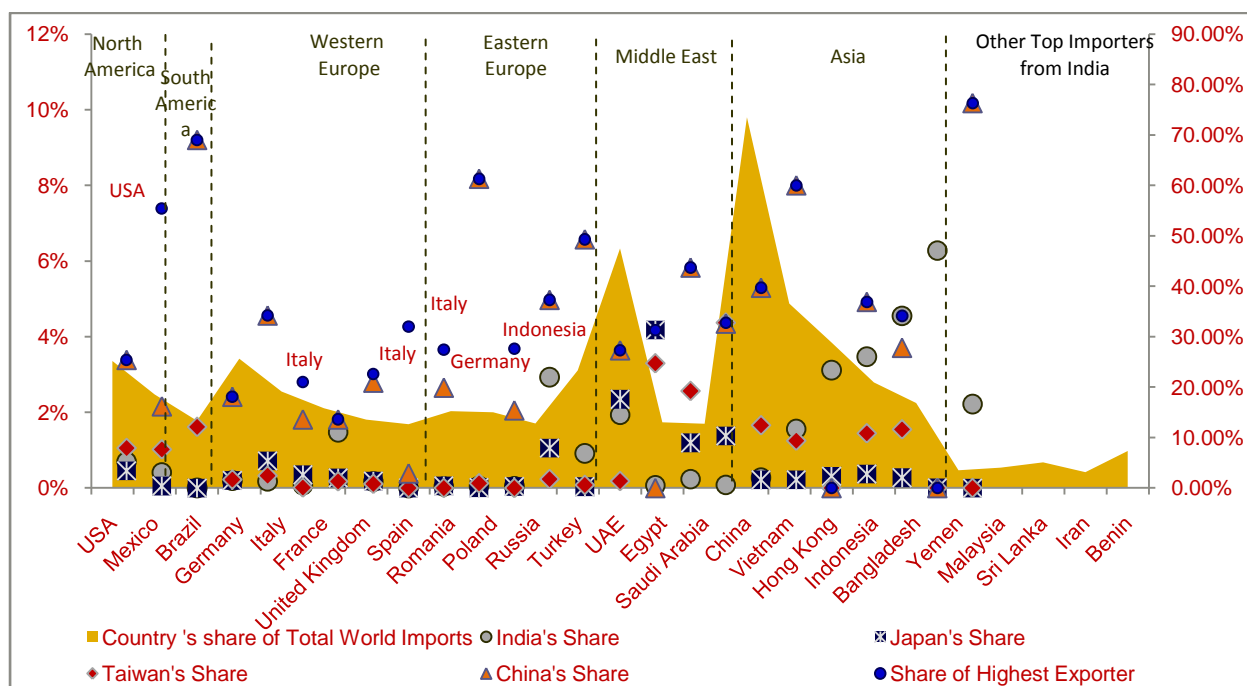
The world cotton fabric export market is dominated primarily by China across all geographic regions. However, more than a quarter of the top 20 markets are being serviced by a few European countries like Italy, Germany, Spain & France. Incidentally, these European countries are also some of the top import markets for the cotton fabric.

Currently, Vietnam has very small share in the global cotton fabric exports. It is also evident from its share in the top markets. However, given the fast pace of its growth, it needs to be seen if Vietnam can increase its contribution in a few leading import markets.

India is the fifth largest exporter of cotton fabric in the world. However, the gap between India and other top performing countries like China, Italy is substantially high. India has relatively lower gap as against countries like Sri Lanka, UAE & United Kingdom.

In order to achieve global competitiveness in cotton fabric exports, India needs to benchmark various levers like regulatory & policy environment and productivity & efficiency parameters with China and select European countries. It may also be probed to understand the sources of advantage of India in Sri Lanka, UAE and UK. Vietnam may be studied for understanding the stimulants of the growth.

## 2. MMF Fabric



The world MMF fabric exports market is dominated primarily by China across all geographic regions. However, some of the top 20 markets are also being serviced by a few European countries like Italy, Germany and Germany. Incidentally, these European countries are also some of the top import markets for the MMF fabrics.

Currently, Japan has nominal share in the global MMF fabric exports market. It is also evident from its share in the top markets. However, Japan has got substantial share in Asian countries namely China, Vietnam & Hong Kong.

Currently, India has small share in global MMF fabric exports. India's share stood close to 6% in 2010. Moreover, the gap between India and other top performing countries like China, Taiwan and Italy is substantially high. India has relatively lower gap against countries like United Kingdom, Saudi Arabia, Malaysia and Sri Lanka.

In order to achieve global competitiveness in MMF fabric exports, India needs to benchmark various levers like regulatory & policy environment and productivity & efficiency parameters with China, Taiwan and select European countries like Italy. It may also be probed to understand the sources of advantage of India in Sri Lanka, Iran, Malaysia, Yemen and UK. Japan may be studied for understanding the stimulants of the growth.