

Cotton Blouses and Women's Shirts - Second Largest RMG Export Item from India



Source: Apparel India

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Cotton blouses and shirts are the most used apparels that every woman young or old wears on a daily basis. It is needless to say that cotton shirts and blouses are not only comfortable but they are available in an array of designs as well.

Women blouses and shirts are the ninth largest imported category in the world apparel import and 13th largest category in world apparel export. In India's export, cotton blouses and shirts are the second largest export item to the world. But over the last five years, there has been a slow down in the trade of this item in the world apparel trade. However, India has not only maintained the position but there has been an increase in the export from India to the world.

Table 1 shows the trade of women blouses and shirts of cotton of world vis-à-vis India. Total market size of women blouses and shirts is around US\$ 5.7 billion with a share of 2.2 per cent in total RMG import. Though, there has been an increase in the share from 2005, the share from the previous year remained stagnant. Being a cotton base product, India enjoys the competitive advantage in this sector.

Table 1: Trade of Women Blouses and Shirts of Cotton World vis-à-vis India								
Exports of Women Blouses and Shirts World vis-à-vis India								
Years	World Export, US\$ Mn.				India's Export, US\$ Mn.			
	2005	2008	2009	2010	2005	2008	2009	2010
RMG	262043.5	347964	301550.1	245767.5	8200.7	10226.5	11312.0	11744.0
620630 (BLOUSES, SHIRTS & SHIRTS-BLOUSES OF COTTON)	4858.5	6758.4	6514.0	3547.1	952.2	948.1	1049.9	1379.7
Share of 620630 in RMG in %	1.9	1.9	2.2	1.4	11.6	9.3	9.3	11.7
Imports of Women Blouses and Shirts World vis-à-vis India								
	World Import, US\$ Mn.				India's Import, US\$ Mn.			
	2005	2008	2009	2010	2005	2008	2009	2010
RMG	268019.6	339431.5	298331.8	262579.6	48.9	137.4	112.8	284.9
620630 (BLOUSES, SHIRTS & SHIRTS-BLOUSES OF COTTON)	4534.9	6872.7	6492.6	5710.8	0.4	1.9	1.8	2.0
Share of 620630 in RMG in %	1.7	2.0	2.2	2.2	0.9	1.4	1.6	0.7

Source: UN Comtrade, 2010

Table 2 & 3 highlights the top five exporters and importers of the product with the unit value realization.

Table 2 suggests that US is the top most market for the import of blouses and shirts in 2010, followed by Germany, Japan, France and UK. These top five markets accounted for almost 68% per cent share in overall import in the world. All these markets have registered a positive growth in import in 2010 from last year. The striking feature is that unit value realization has remained stagnant for US since 2005, while for other markets there has been fluctuation.

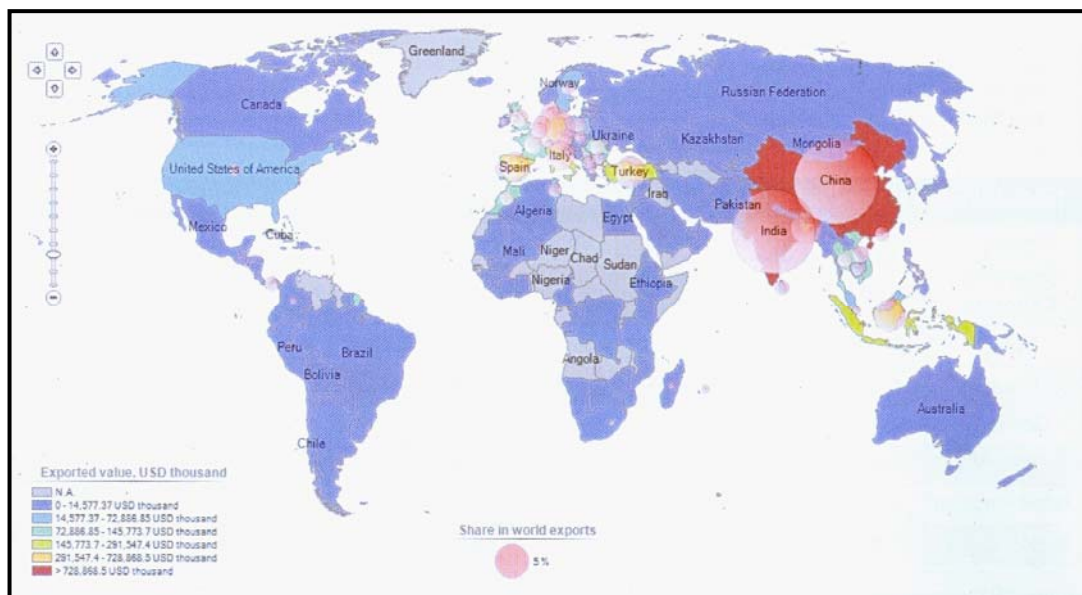
Rank in 2010	Countries	2005		2008		2009		2010		Change 10/09	% Share 2010
		Value	UVR, US\$	Value	UVR, US\$	Value	UVR, US\$	Value	UVR, US\$		
	World	4524.3	NA	6859.1	8.8	6478.2	6.7	5710.8	7.2	-11.8	100.0
1	USA	1490.0	5.5	1503.5	10.8	1446.6	5.4	1569.0	5.5	8.5	27.5
2	Germany	382.5	9.7	746.8	10.8	752.2	12.1	857.0	10.4	13.9	15.0
3	Japan	411.7	13.5	400.4	10.8	441.9	7.5	525.6	8.1	18.9	9.2
4	France	201.1	7.5	447.5	8.5	468.2	7.8	465.4	7.7	-0.6	8.2
5	UK	298.2	7.3	462.3	7.6	430.3	6.9	433.9	7.1	0.8	7.6

Source: UN Comtrade, 2010

Table 3 highlights china as the top most suppliers followed by India, Germany, Turkey and Italy. Though there has been an overall decline in exporters registered an increase in the exports from the previous year.

Rank in 2010	Countries	2005		2008		2009		2010		Change 10/09	% Share 2010
		Value	UVR, US\$	Value	UVR, US\$	Value	UVR, US\$	Value	UVR, US\$		
	World	3906.3	NA	5810.3	7.2	5464.0	7.2	3547.1	7.6	-35.1	100.0
1	China	622.5	3.6	1311.2	5.0	1284.8	5.1	1457.7	5.3	13.5	41.1
2	India	952.2	4.5	948.1	4.0	1049.9	5.0	1379.7	5.0	31.4	38.9
3	Germany	165.0	6.9	401.4	13.8	372.3	13.2	400.5	12.3	7.6	11.3
4	Turkey	175.0	8.5	282.9	8.8	246.3	7.6	270.4	7.2	9.8	7.6
5	Italy	156.7	27.8	316.2	33.8	240.2	31.4	240.3	29.7	0.1	6.8

Fig 1: Major Exporters of Blouses, 2010



It is clearly demarcated that the eastern part of the world is the supplier for the product while western part of world is the net consumer of product.

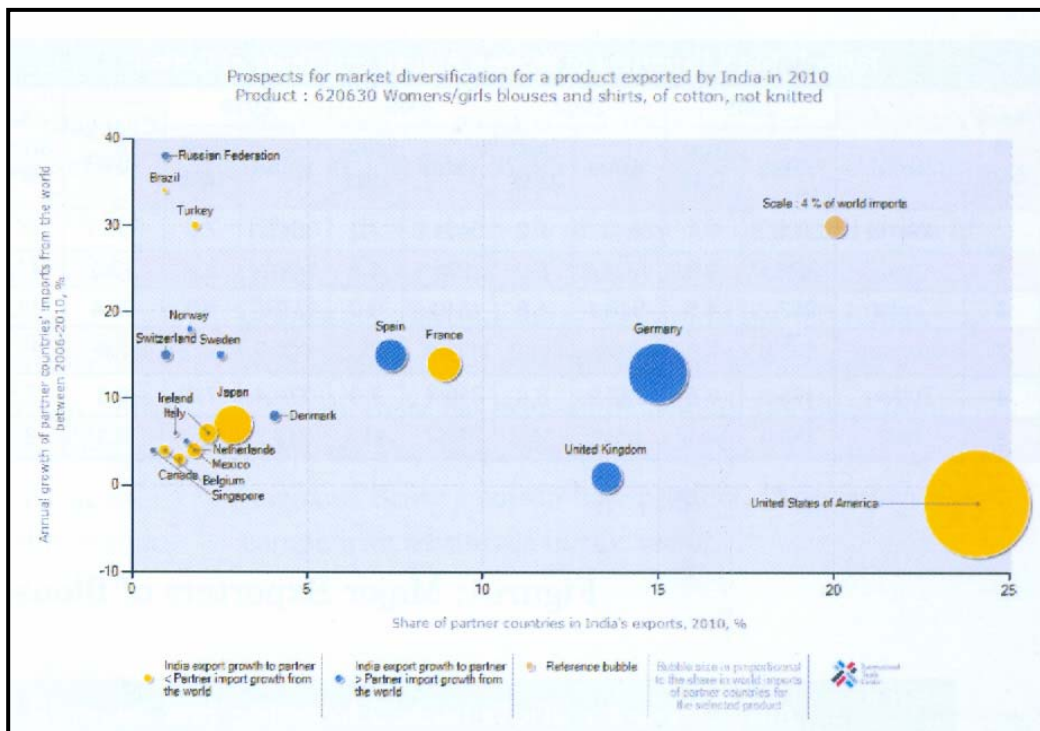
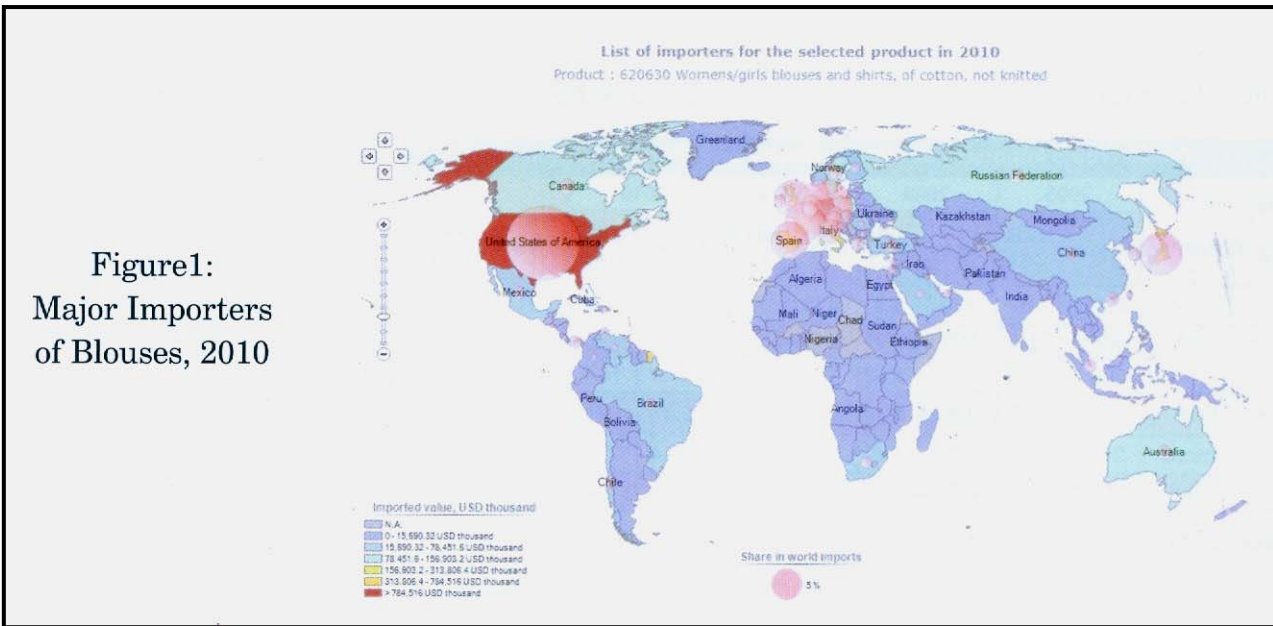


Figure 3 shows the diversification of market for the product and the countries, depicted through the yellow circle are the largest markets but in future the possibility of increase in demand is low while markets depicted through blue circle are the emerging and growing market, where Indian exporters should focus aggressively like Germany, Italy, UK and Spain. The exports should be maintained in the markets depicted in the yellow circle i.e. USA, France, Japan and Netherlands.

Competitive position of India's Export in the World for Women Blouses and Shirts of Cotton

India in major importing countries is the second largest supplier after China. In countries like UK and France, India has emerged as a dominant supplier of the product. Though,

there has been a decline in the overall demand of the product, however exports from India remained buoyant in all major market's except for France, which is attributed to the rupee appreciation and slow recovery of economy of France.

Table 4: India's Major Competitors in 5 Major Markets for Women Blouses and Shirts of Cotton (620630)

Top 5 Importing Countries	Value in 2010	% Change 2010/2009	Avg. (UVR, US\$)	Share in total import by % Major importers, 2010						% Change India 2010/2009
				China	Bangladesh	India	Italy	Turkey	Vietnam	
World	5710.8	-11.8	7.2	36.2	4.5	21.5	3.2	4.0	1.6	-4.0
France	465.4	-0.6	7.7	22.5	2.3	26.3	4.5	6.8	0.4	-2.4
Germany	857.0	13.9	10.4	24.2	6.5	24.1	2.8	12.6	1.1	12.0
Japan	525.6	18.9	8.1	82.1	0.3	7.6	1.7	0.2	1.6	2.8
United Kingdom	433.9	0.8	7.1	15.4	4.2	43.0	3.7	6.0	1.7	9.1
United States	1569.0	8.5	5.5	44.0	6.8	21.2	0.9	0.3	3.5	20.7

Source: UN Comtrade. 2010

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outletjackets.com
 dinodirect.com
 animehoodie.info