

STATS WINDOW

Global Textile and Apparel Industry

Global Apparel Market

The current global apparel market is worth US\$ 1.7 trillion and it constitutes around 2% of the world's GDP.

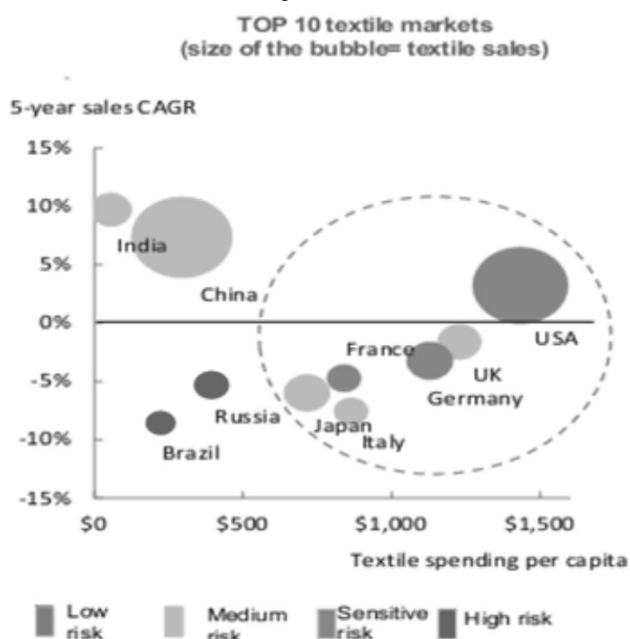
EU, USA & China are the world's largest apparel markets with a combined share of approximately 54%. The top 8 apparel consuming nations form a dominating share of 70% of the global apparel market size.

Global Apparel Market Size (US\$ Bn.)

S. No.	Region	2015	Projected CAGR	2025
1	EU 28	350	1%	390
2	USA	315	2%	385
3	China	237	10%	615
4	Japan	93	1%	105
5	India	59	12%	180
6	Brazil	56	5%	90
7	Russia	40	3%	55
8	Canada	25	2%	30
	Others	510	4%	750
	Total	1,685	4%	2,600

Source: Wazir Research and Analysis

World's Major Textile Markets



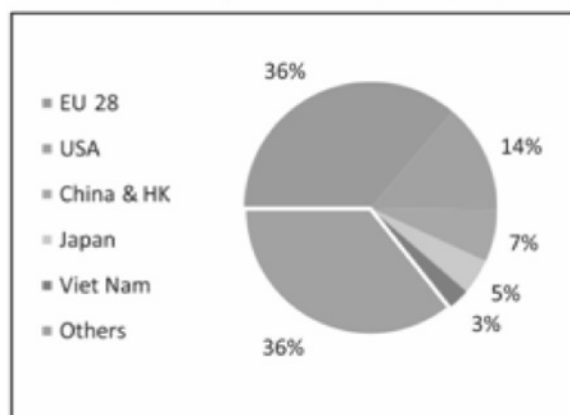
Sources: Oxford Economics, Euler Hermes

Major Market and Supplier

EU & USA are the largest markets for textile and apparel with a share of 36% and 14% respectively. On the supply side, China is the largest supplier of textile and apparel

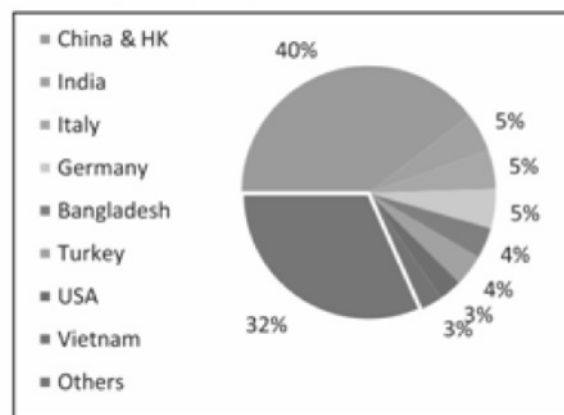
in the world with a dominating share of 40%. It is distantly followed by countries like India, Italy, and Germany etc. each with an approximate share of 5% in the global textile and apparel exports.

Major markets for textile and apparel (2014)



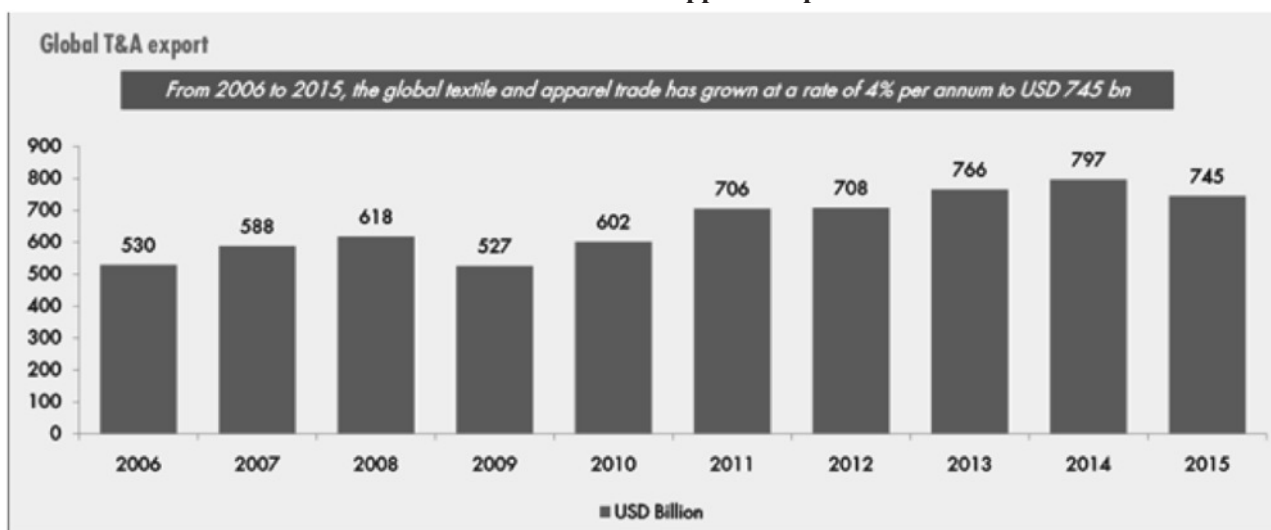
Source: UN Comtrade

Major suppliers of textile and apparel (2014)



Source: UN Comtrade

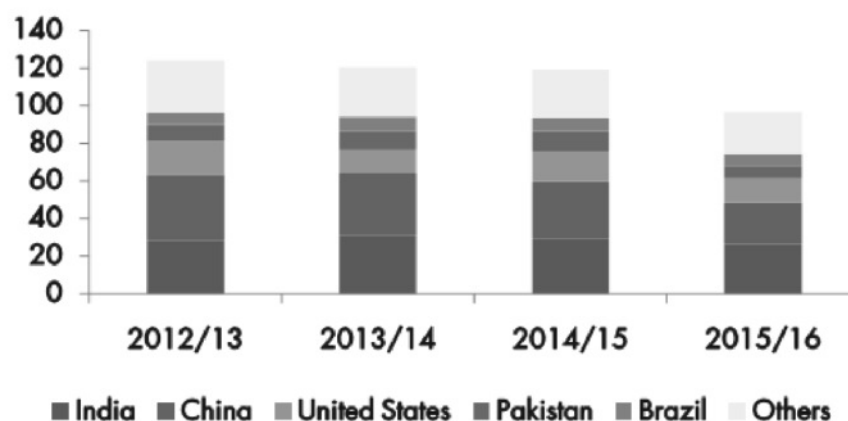
Global Textile and Apparel Export



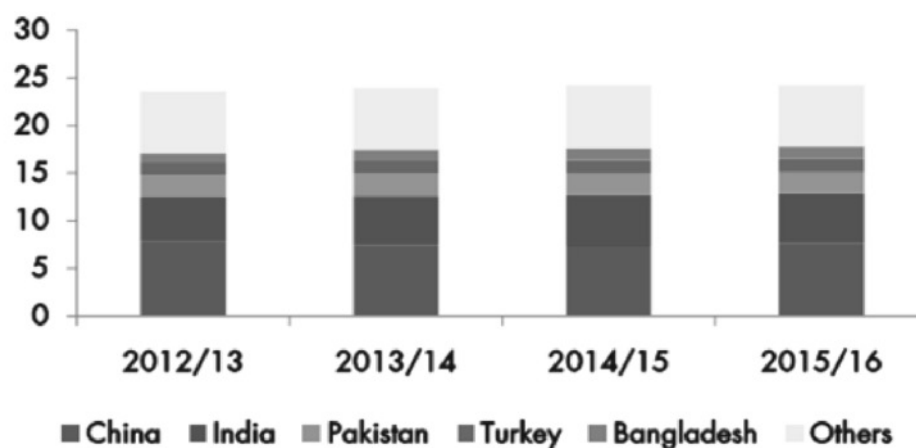
Global Apparel consumption will become USD 2600 Bn

Region (USD Bn)	2015	2025	CAGR (%)
EU 28	350	390	1.1%
USA	315	385	2.0%
China	237	615	10.0%
Japan	93	105	1.2%
India	59	180	11.8%
Brazil	56	90	4.9%
RoW	575	835	3.8%
Total	1685	2600	4.4%

World cotton production (mn bales)

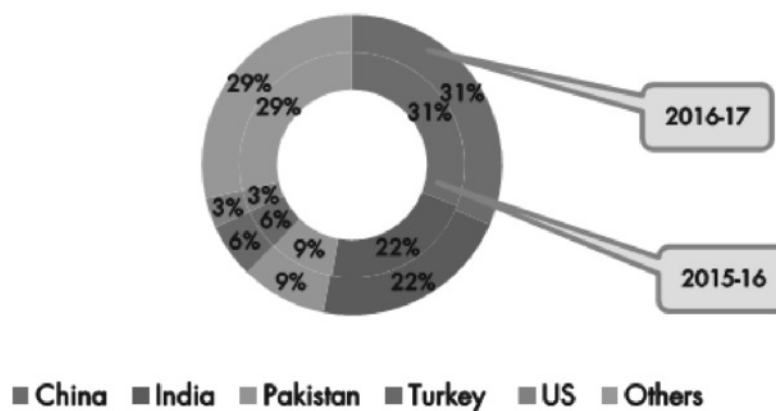


World cotton consumption (mn metric tons)



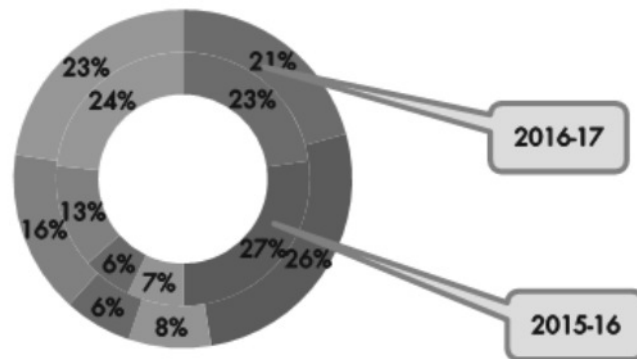
Source: Cotton inc, Axis Securities Ltd.

Global cotton consumption forecast



Source: Weiqiao Textile presentation , Axis Securities Ltd.

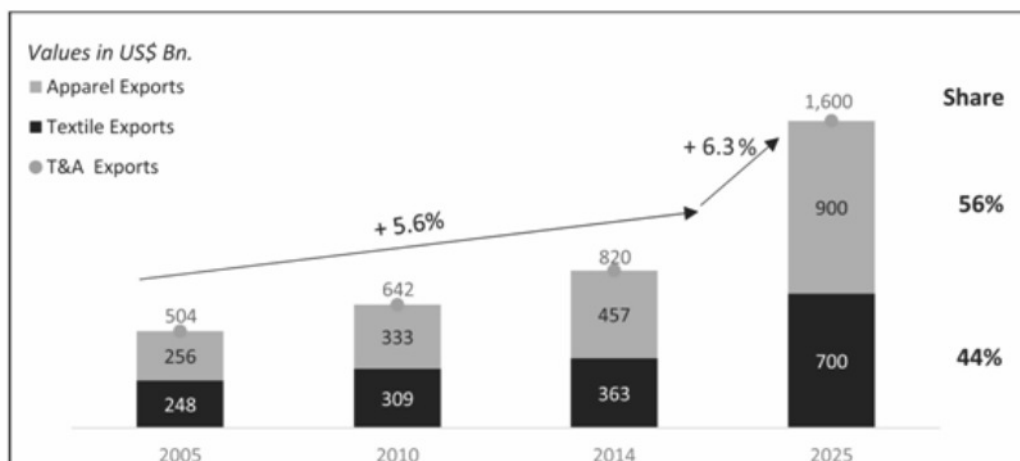
Global cotton supply forecast



■ China ■ India ■ Pakistan ■ Brazil ■ US ■ Others

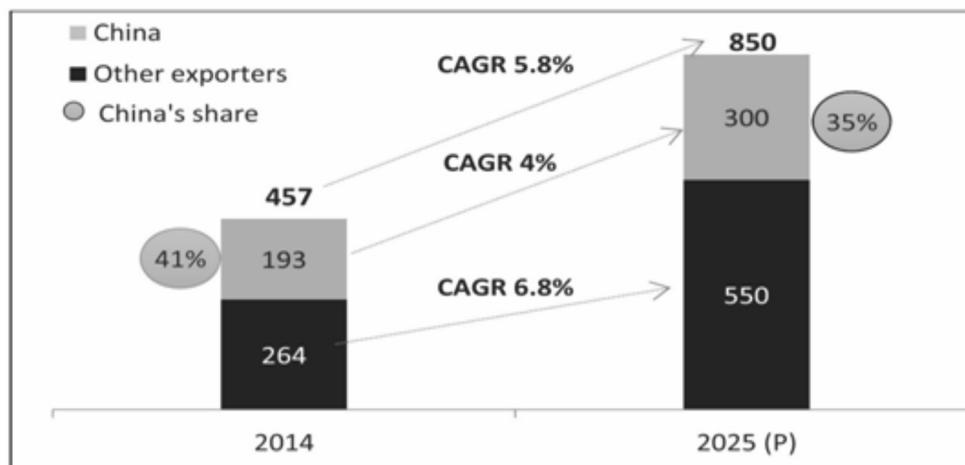
Source: Weiqiao Textile presentation, Axis Securities Ltd.

Global Textile and Apparel Trade (US\$ bn.)



Source: UN Comtrade

Global Apparel Trade Projections until 2025 (In US\$ bn.)



Source: UN Comtrade & Wazir Analysis

Top Ten Globally Traded Categories (US\$ Bn.)

S. No.	Description	2005	2010	2014	Share in Global Trade	CAGR (9 yrs)	India's Share (2014)
1	Sweaters	33	43	53	6%	5%	1%
2	Jeans & Others	32	38	51	6%	5%	2%
3	T Shirts	26	33	44	5%	6%	6%
4	Trousers	20	26	39	5%	7%	2%
5	Jackets	16	19	34	4%	8%	1%
6	Dresses	5	16	26	3%	18%	6%
7	Cotton Yarn	9	13	16	2%	6%	25%
8	Blouses	12	13	16	2%	3%	11%
9	Carpets	11	13	16	2%	4%	11%
10	Woven Shirts	10	12	16	2%	4%	7%

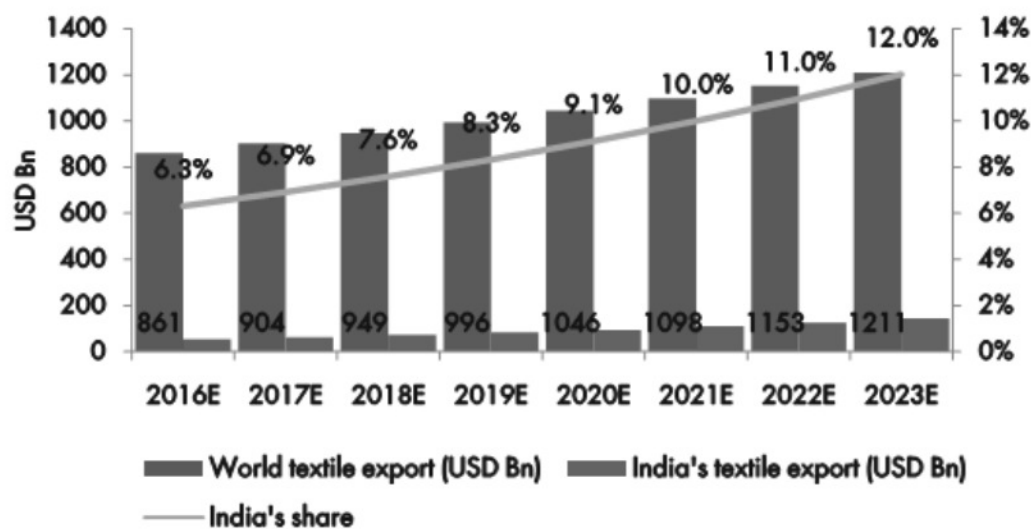
Source: UN Comtrade & Wazir Analysis

Top Textile and Apparel Importers and India's Share

Rank	Importers	2005	2010	2014	CAGR (9 yrs)	Share in Global Trade	India's Share (2014)
1	USA	89	93	115	3%	16%	6%
2	Germany	26	31	53	8%	8%	4%
3	Japan	20	23	39	8%	6%	1%
4	United Kingdom	21	23	36	6%	5%	7%
5	China	20	25	36	7%	5%	9%
6	France	17	19	31	7%	4%	4%
7	Italy	16	19	27	6%	4%	3%
8	Hong Kong SAR	26	23	25	0.4%	4%	1%
9	Spain	10	13	21	9%	3%	4%
10	Netherlands	6	8	16	12%	2%	4%

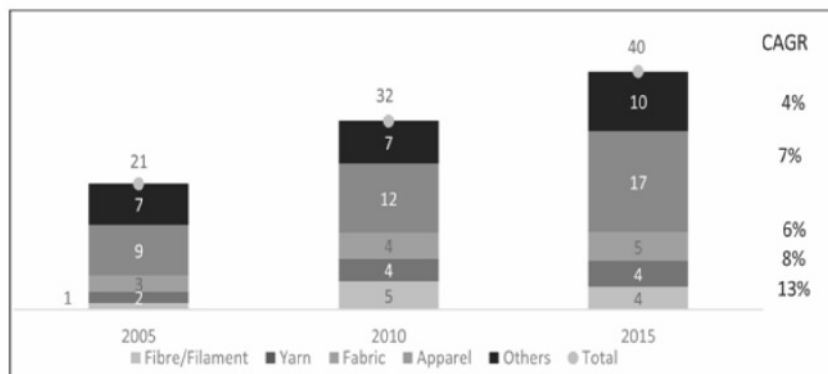
Source: UN Comtrade

India's share in global textile export to rise



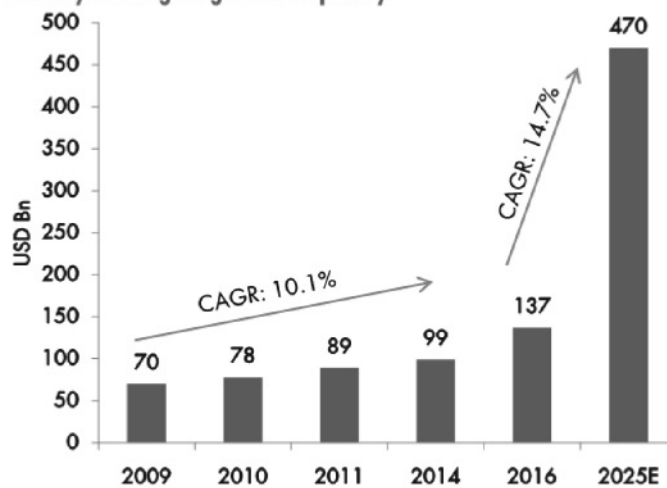
Source: Industry reports, Axis Securities Ltd.

India's Textile and Apparel Exports (US\$ Bn.)



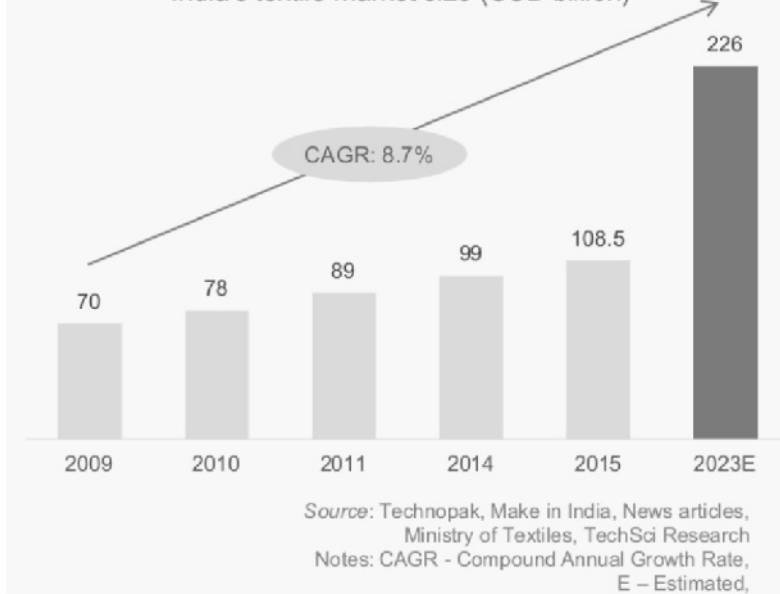
Source: DGCI, Ministry of Commerce, EPCH

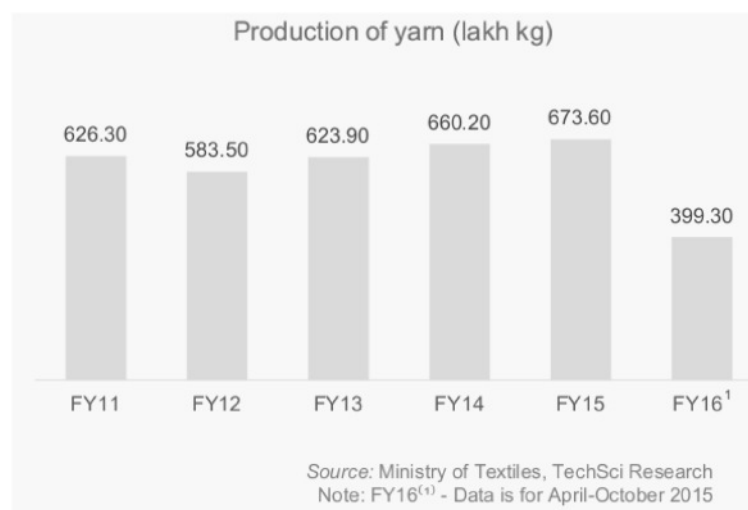
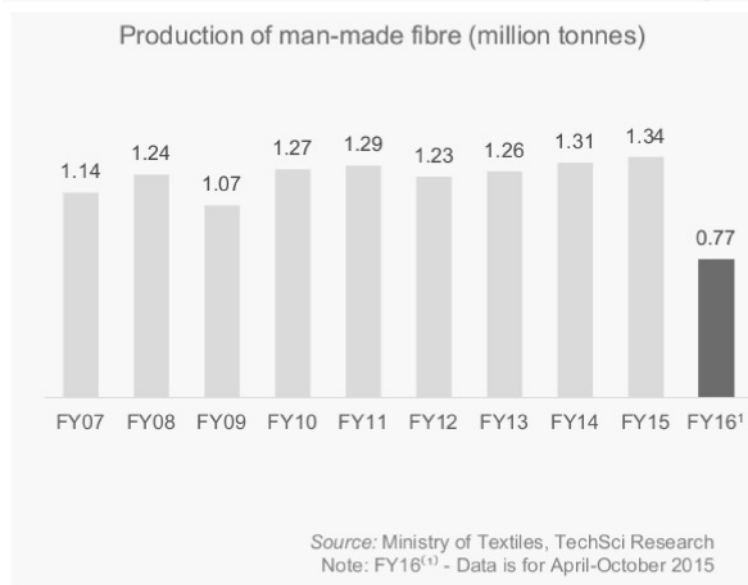
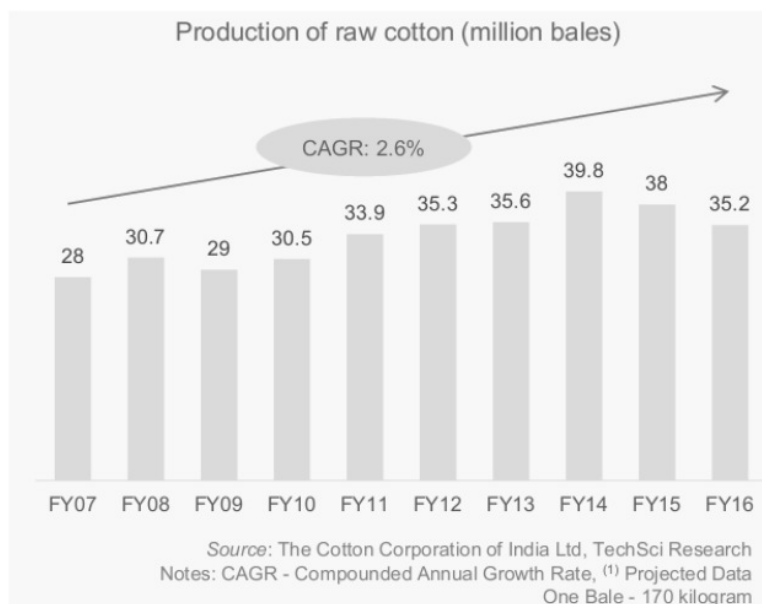
Industry on a higher growth trajectory

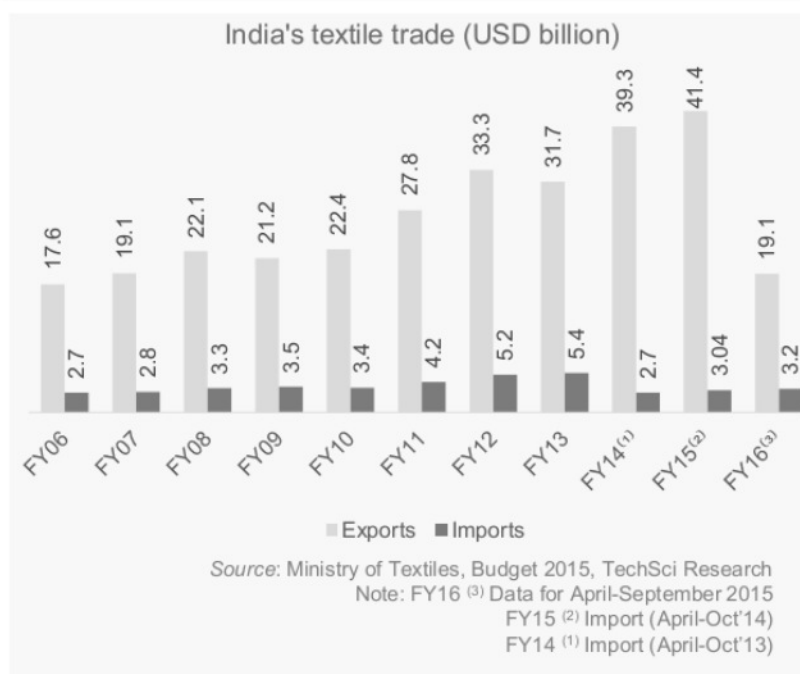
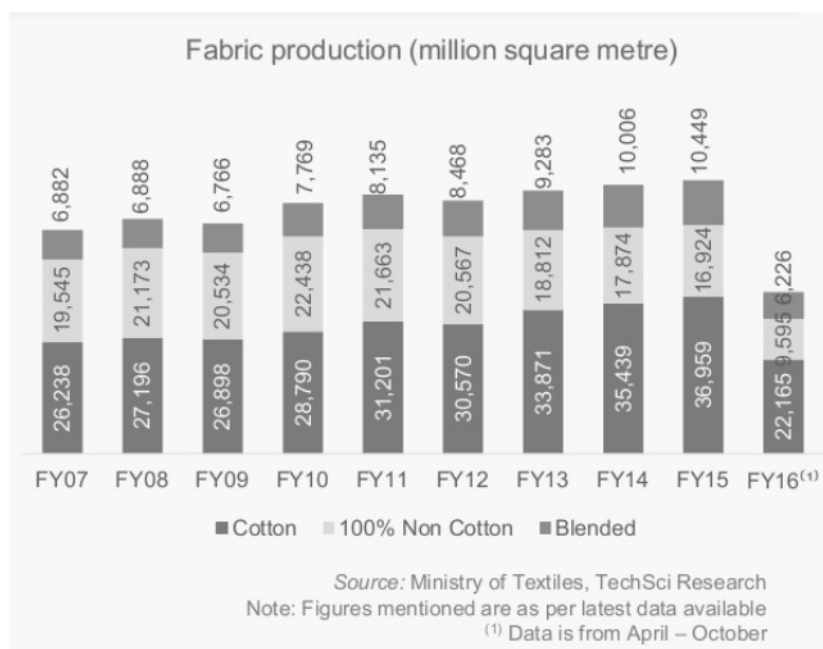


Source: IBEF, Alok Industries.

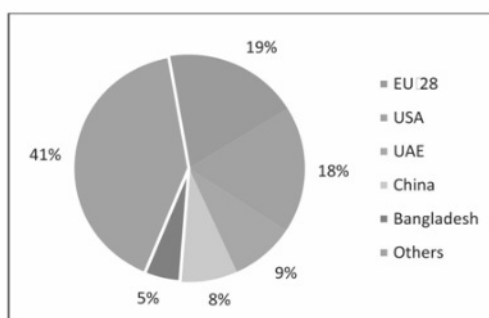
India's textile market size (USD billion)



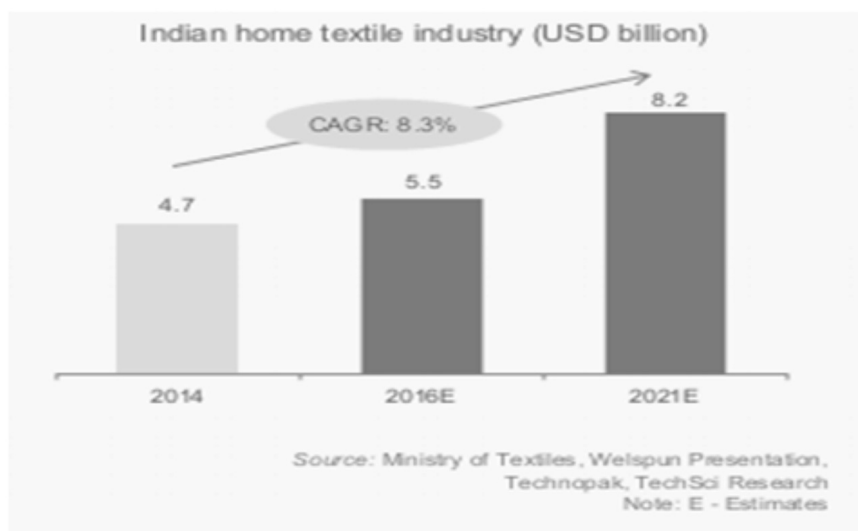




Major Textile and Apparel Markets for India's



Source: DGCI, Ministry of Commerce

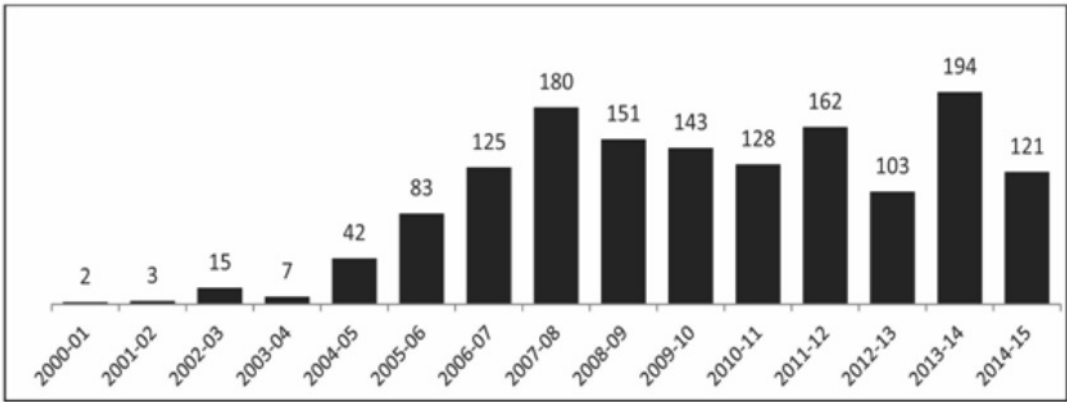


Total FDI Inflow in India (US\$ Bn.)

US\$ bn.	Total FDI Inflow	FDI inflow in T&A	Share
2000 01	4	0.002	0.05%
2001 02	6.1	0.003	0.05%
2002 03	5	0.015	0.30%
2003 04	4.3	0.007	0.16%
2004 05	6.1	0.042	0.69%
2005 06	9	0.083	0.92%
2006 07	22.8	0.125	0.55%
2007 08	34.8	0.180	0.52%
2008 09	41.8	0.151	0.36%
2009 10	37.8	0.143	0.38%
2010 11	34.8	0.128	0.37%
2011 12	46.6	0.162	0.35%
2012 13	34.3	0.103	0.30%
2013 14	36	0.194	0.54%
2014 15	44.8	0.121	0.27%

Source: FDI Statistics, Department of Industrial policy and Promotion (DIPP)

FDI Inflow in Indian Textile and Apparel Sector (US\$ Mn.)



Source: FDI Statistics, Department of Industrial policy and Promotion (DIPP)