

Export Performance of MMF Textiles During April 2022 – February 2023

For



वस्त्र मंत्रालय
MINISTRY OF
TEXTILES

Ministry of Textiles
Government of India

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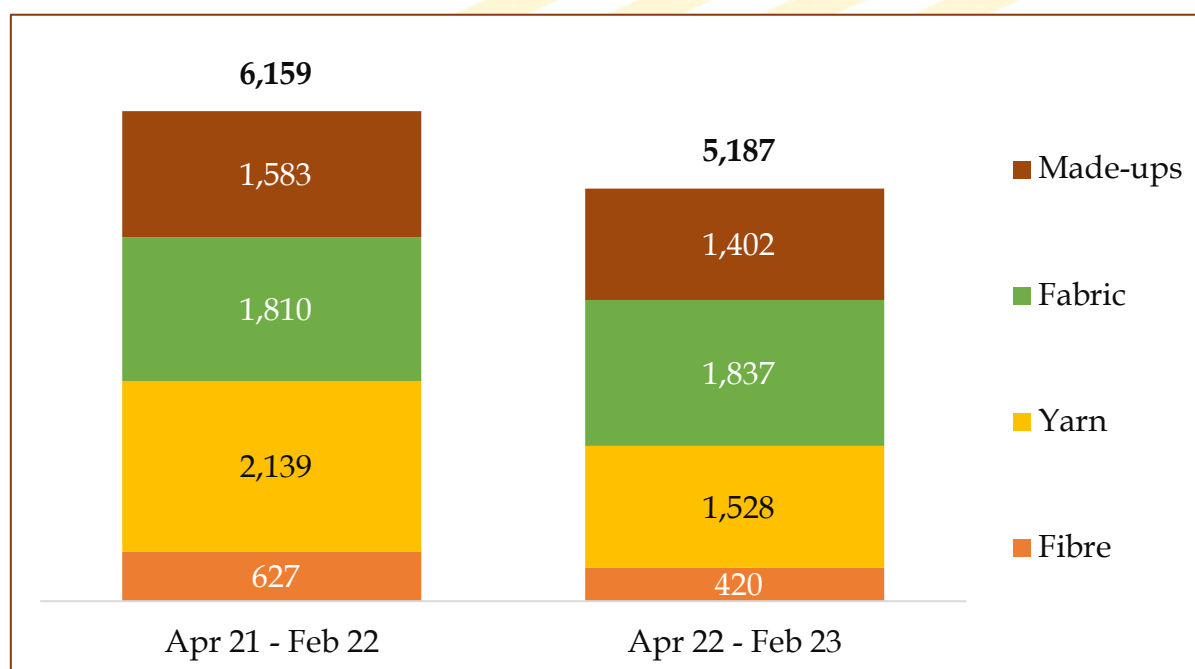
1 Key Highlights

- Exports of Indian Man-Made Fibre (MMF) textiles reached US\$ 4,730.62 Mn declining by 15.8% during Apr 22 - Feb 23 from Apr 21 - Feb 22.
- Exports of MMF Fabrics witnessed 3% growth during Apr 22 - Feb 23 as compared to the same period of the previous year.
- During Apr 22 - Feb 23, MMF fabrics represents 35% of the market share followed by MMF yarn 29%.
- Polyester Staple Fibre (PSF) was the largest exported Man-made fibre from India during Apr 22 - Feb 23, with an exports value of US\$ 258.65 Mn., followed by Viscose Staple Fibres (VSF) with an export of US\$ 108.95 Mn.
- Export values of PSF and VSF have declined by 37% and 43%, respectively whereas the exports quantity have declined by 43% each.
- The exports value of Nylon Filament Yarn (NFY) and Viscose Filament Yarn (VFY) have shown a healthy growth of 15% and 21%, respectively and that of Poly-Viscose Spun Yarn and Acrylic Spun Yarn have grown by 1% and 18%, respectively.
- The exports value of MMF woven fabrics has grown by 8% during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22. However, the exports of MMF Knitted Fabrics and Nonwovens have declined by 22% and 29%, respectively during the same period.
- USA was the leading market for Indian MMF textiles during Apr 22 - Feb 23 with 15% share in total exports followed by Turkey 10%, UAE 7%, and Bangladesh 6%.
- Other major markets during Apr 22 - Feb 23 were Sri Lanka 4%, Brazil, Italy UK 3% each and Germany, Spain 2% each.

2 Exports of MMF Textiles During April 2022 – February 2023

Exports of Indian Man-Made Fibre (MMF) textiles reached US\$ 4,730.62 Mn in Apr 22 - Feb 23 as against exports of US\$ 5,589.70 Mn during the corresponding period of the previous year.

Figure 1: Export of MMF Textiles During April 2022 – February 2023 in US\$ Mn.



Source: DGCI&S and SRTEPC Analysis

3 Product Category-wise Exports of MMF Textiles

- Overall exports in Apr 22 - Feb 23 declined by 15.8% as compared to the same period of the previous year.
- Exports of MMF Fabrics witnessed 3% growth during Apr 22 - Feb 23 as compared to the same period of the previous year.
- Exports of Man-made fibres (MMF) witnessed a decline of 33% during the observed period.
- Exports of MMF Yarn have also witnessed a decline of 29% during Apr 22 - Feb 23 as compared to the same period of the previous year.
- Exports of MMF Made-ups have witnessed a decline of 10.87% during Apr 22 - Feb 23 as compared to the same period of the previous year.

Table 1: Product Category-wise Exports of MMF Textiles

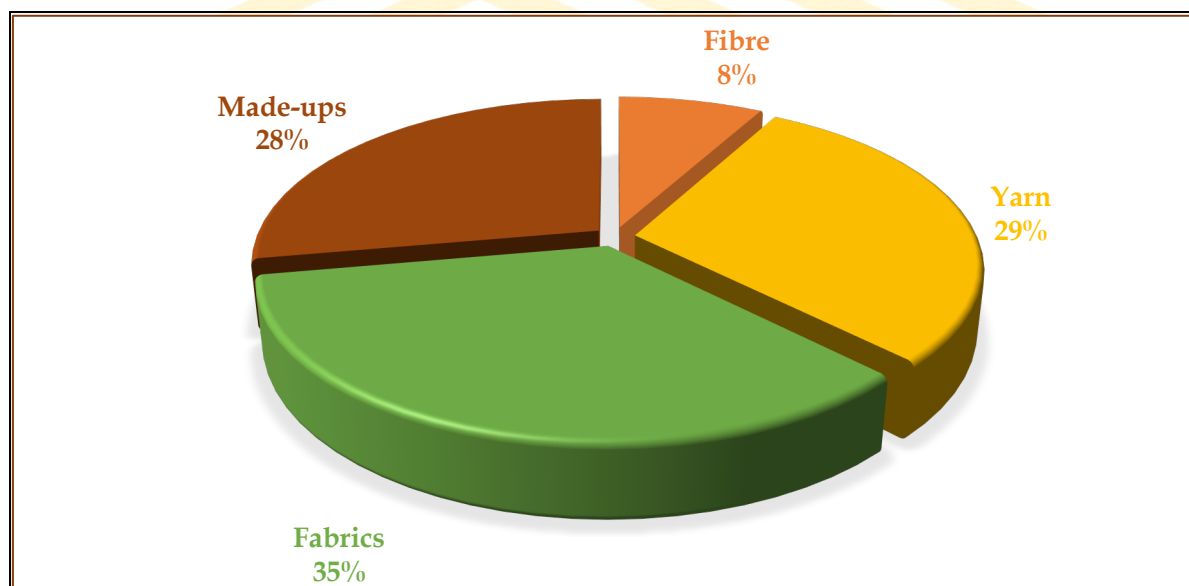
Product	Unit	in Quantity (Mn.)		% Growth	in Value US\$ Mn.		% Growth
		Apr 21 - Feb 22	Apr 22 - Feb 23		Apr 21 - Feb 22	Apr 22 - Feb 23	
Fibre	Kgs	455.78	277.40	-39%	626.98	419.72	-33%
Yarn	Kgs.	1,003.55	658.10	-34%	2,139.13	1,528.43	-29%
Fabrics	Kgs.	109.92	84.88	-23%	1,809.81	1,836.95	1%
	Sqm	2,786.23	1,886.41	-32%			
Made-ups	Kgs.	393.31	377.25	-4%	1,583.01	1,401.51	-11%
	Nos.	1.37	1.09	-20%			
	Sqm	75.82	64.74	-15%			
Total					6,158.93	5,186.61	-15.8%

Source: DGCIS and SRTEPC Analysis

3.1 Product Category Share in MMF Textiles Exports

During Apr 22 - Feb 23, dominant product in the Indian MMF Textiles export basket was fabrics, accounting for a share of 35% followed by yarn 29%, made-ups 28% and Fibre 8%.

Figure 2: Product Categories Exports Share in Apr 22 - Feb 23



Source: DGCIS and SRTEPC Analysis

4 Product-wise Export Performance During Apr 22 - Feb 23

4.1 Exports of Man-made Fibres

- Polyester Staple Fibre (PSF) was the largest exported Man-made fibre from India during Apr 22 – Feb 23, with an exports value of US\$ 258.65 Mn., followed by Viscose Staple Fibres (VSF) with an export of US\$ 108.95 Mn.
- Export values of PSF and VSF have declined by 37% and 43%, respectively whereas the exports quantity have declined by 43% each.
- The exports of Acrylic Staple Fibre (ASF) have shown healthy growth of 247% during Apr 22 – Feb 23 as compared to Apr 21 – Feb 22.

Table 2: Exports of Man-made Fibre

Product Category	UoM	Qty. in Mn.		% Growth	Value in US\$ Mn.		% Growth
		Apr 21 - Feb 22	Apr 22 - Feb 23		Apr 21 - Feb 22	Apr 22 - Feb 23	
Polyester Staple	Kgs	357.03	204.57	-43%	408.55	258.65	-37%
Viscose Staple	Kgs	85.23	48.26	-43%	192.19	108.95	-43%
Acrylic Staple	Kgs	2.42	9.18	280%	6.84	23.76	247%
Other Fibres*	Kgs	11.11	15.38	38%	19.40	28.36	46%
Total	Kgs	455.78	277.40	-39%	626.98	419.72	-33%

Source: DGCI&S and SRTEPC Analysis

4.2 Exports of MMF Yarns

- The exports value of Man-made Filament Yarns has declined by 34% during Apr 22 – Feb 23 as compared to Apr 21 – Feb 22. However, the exports of MMF Spun Yarn have declined by 18% during the same period.
- The exports value of Nylon Filament Yarn (NFY) and Viscose Filament Yarn (VFY) have shown a healthy growth of 15% and 21%, respectively and that of Poly-Viscose Spun Yarn and Acrylic Spun Yarn have grown by 1% and 18%, respectively.

Table 3: Exports of MMF Yarns

Product Category	UoM	Qty. in Mn.		% Growth	Value in US\$ Mn.		% Growth
		Apr 21 - Feb 22	Apr 22 - Feb 23		Apr 21 - Feb 22	Apr 22 - Feb 23	
Filament Yarn							
Polyester	Kgs	709.49	427.20	-40%	1,191.07	749.29	-37%
Nylon	Kgs	9.51	11.93	25%	39.58	45.66	15%
Viscose	Kgs	7.23	6.57	-9%	31.38	37.9	21%
Polypropylene	Kgs	7.37	6.82	-7%	16.56	14.64	-12%

Product Category	UoM	Qty. in Mn.		% Growth	Value in US\$ Mn.		% Growth
		Apr 21 - Feb 22	Apr 22 - Feb 23		Apr 21 - Feb 22	Apr 22 - Feb 23	
Elastomeric	Kgs	5.67	2.06	-64%	57.66	12.16	-79%
Others	Kgs	14.24	2.06	-86%	60.12	2.06	-97%
Sub-Total	Kgs	753.51	467.05	-38%	1396.37	917.35	-34%
Spun Yarn							
Poly Viscose	Kgs	47.25	43.08	-9%	135.84	136.52	1%
Poly Cotton	Kgs	76.38	45.80	-40%	213.56	129.37	-39%
Polyester	Kgs	57.70	48.60	-16%	141.49	125.52	-11%
Viscose	Kgs	35.21	22.46	-36%	129.94	90.75	-30%
Acrylic	Kgs	19.26	18.91	-2%	46.54	54.85	18%
Others	Kgs	14.24	2.06	-86%	75.39	2.0581	-97%
Sub-Total	Kgs	250.04	191.05	-24%	742.76	611.08	-18%
Total Yarn	Kgs	1003.55	658.10	-34%	2139.13	1528.43	-29%

Source: DGCIS and SRTEPC Analysis

4.3 Exports of MMF Fabrics

- The exports value of MMF woven fabrics has grown by 8% during Apr 22 – Feb 23 as compared to Apr 21 – Feb 22. However, the exports of MMF Knitted Fabrics and Nonwovens have declined by 22% and 29%, respectively during the same period.
- Polyester Filament Woven Fabrics were the largest exported product followed by Poly Viscose Spun Fabrics.

Table 4: Exports of MMF Fabrics

Product Category	UoM	Qty. in Mn.		% Growth	Value in US\$ Mn.		% Growth
		Apr 21 -Feb 22	Apr 22 - Feb 23		Apr 21 - Feb 22	Apr 22 - Feb 23	
Woven Fabric							
Polyester Filament	Sqm	726.60	772.15	6%	404.86	516.89	28%
Poly Viscose Spun	Sqm	198.01	203.46	3%	225.61	270.24	20%
Poly Cotton Spun	Sqm	52.36	65.84	26%	39.86	53.86	35%
Polyester Spun	Sqm	36.12	56.48	56%	31.25	49.23	58%
Viscose Spun	Sqm	59.65	64.65	8%	47.49	48.46	2%
Nylon Filament	Sqm	23.61	14.86	-37%	28.31	19.23	-32%
Others	Sqm	1,689.88	708.97	-58%	689.56	623.61	-10%
Sub-Total	Sqm	2,786.23	1,886.41	-32%	1,466.94	1,581.52	8%
	Kgs	13.87	17.12	23%	99.02	108.13	9%
Knitted Fabric							
Weft Knitted	Kgs	22.74	16.72	-26%	163.59	127.55	-22%
Warp Knitted	Kgs	0.08	0.13	55%	0.28	0.46	64%
Sub-Total	Kgs	22.82	16.85	-26%	163.87	128.01	-22%
Nonwovens							
Nonwovens	Kgs	73.23	50.91	-30%	179	127.42	-29%

Source: DGCIS and SRTEPC Analysis

4.4 Exports of MMF Made-ups

- The exports MMF Made-ups have declined by 113% during Apr 22 – Feb 23 as compared to Apr 21 – Feb 22.
- Bulk Containers were the largest exported MMF made-up product, with an exports value of US\$ 792.8 Mn. during Apr 22 – Feb 23.

Table 5: Exports of MMF Made-ups in US\$ Mn.

Product Description	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
Bulk Containers	915.08	792.83	-122.25	-13%
Fishing Net	60.66	68.17	7.51	12%
Blanket	45.56	54.58	9.02	20%
Shawls/Scarves	87.96	43.64	-44.32	-50%
Motifs	45.12	39.11	-6.01	-13%
Furnishing Articles	42.28	35.01	-7.27	-17%
Muffler	56.96	28.19	-28.77	-51%
Bed Linen	28.11	27.88	-0.23	-1%
Rope	21.77	25.27	3.50	16%
Sacks and Bags	14.50	16.87	2.37	16%
Other Made-ups	265.01	269.96	4.95	2%
Total	1,583.01	1,401.51	-181.50	-11%

Source: DGCI&S and SRTEPC Analysis

5 Leading Markets for Indian MMF Textiles

- Top 10 export markets of Indian MMF Textiles represents 56% of the total MMF Textiles exports from India.
- Among these export markets, exports of MMF Textiles to UAE have shown a growth of 3% during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.
- However, the exports of MMF Textiles to all the other top 10 markets have declined during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 6: Leading Markets for Indian MMF Textiles (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
USA	887.9	796.0	-92.0	-10%
Turkey	592.9	498.9	-94.0	-16%
UAE	348.5	360.2	11.6	3%
Bangladesh	391.5	332.0	-59.5	-15%
Sri Lanka	227.2	187.9	-39.4	-17%
Brazil	277.4	156.0	-121.5	-44%
Italy	156.7	154.2	-2.5	-2%
UK	187.5	151.5	-36.0	-19%
Germany	153.1	131.2	-21.9	-14%
Spain	148.8	116.0	-32.9	-22%
RoW*	2,787.3	2,302.9	-484.4	-17%
Total	6,158.9	5,186.6	-972.3	-16%

Source: DGCI&S and SRTEPC Analysis

*Rest of the World

- USA was the leading market for Indian MMF textiles during Apr 22 - Feb 23 with 15% share in total exports followed by Turkey 10%, UAE 7%, and Bangladesh 6%.
- Other major markets during Apr 22 - Feb 23 were Sri Lanka 4%, Brazil, Italy UK 3% each and Germany, Spain 2% each.

5.1 Major Markets for Man-made Fibres

5.1.1 Leading Markets for Polyester Staple Fibre (PSF)

- Top 10 export markets of Indian PSF represents 76% of the total PSF exports from India.
- Among these export markets, exports of PSF to Nepal have shown a growth of 11% during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.
- However, the exports of PSF to all the other top 10 markets have declined during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 7: Leading Markets for Polyester Staple Fibre (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
USA	68.9	61.2	-7.7	-11%
Nepal	36.2	40.2	4.0	11%
Turkey	53.2	20.9	-32.2	-61%
Belgium	20.8	18.2	-2.6	-13%
Germany	12.3	11.7	-0.6	-5%
Spain	19.3	11.5	-7.9	-41%
Mexico	25.8	11.0	-14.8	-57%
Brazil	18.9	7.5	-11.4	-60%
Italy	9.4	7.3	-2.2	-23%
Egypt	20.3	7.3	-13.1	-64%
RoW	123.4	62.1	-61.4	-50%
Total	408.5	258.6	-149.9	-37%

Source: DGCI&S and SRTEPC Analysis

5.1.2 Leading Markets for Viscose Staple Fibre (VSF)

- Top 10 export markets of Indian VSF represents 84% of the total VSF exports from India.
- Among these export markets, exports of VSF to UAE have shown a growth of 33% during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.
- However, the exports of VSF to all the other top 10 markets have declined during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 8: Leading Markets for Viscose Staple Fibre (VSF) (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
Turkey	54.7	45.5	-9.2	-17%
Bangladesh	31.7	13.1	-18.6	-59%
Nepal	8.2	8.2	0.0	0%

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
USA	18.5	7.8	-10.7	-58%
UAE	5.0	6.6	1.7	33%
Russia	4.6	4.1	-0.5	-11%
Belgium	1.4	1.8	0.3	22%
France	2.8	1.5	-1.3	-46%
Germany	5.4	1.5	-4.0	-73%
Italy	2.1	1.4	-0.6	-30%
RoW	57.9	17.4	-40.5	-70%
Total	192.1	108.9	-83.2	-43%

Source: DGCI&S and SRTEPC Analysis

5.1.3 Leading Markets for Acrylic Staple Fibre (ASF)

- Top 10 export markets of Indian ASF represents 81% of the total ASF exports from India.
- The exports of ASF to all the top 10 markets have grown, except Italy, during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 9: Leading Markets for Acrylic Staple Fibre (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
UAE	1.2	13.3	12.1	1008%
Turkey	0.1	2.6	2.5	2500%
Spain	0.2	0.9	0.7	350%
Nepal	0.0	0.7	0.7	-
Nigeria	0.2	0.5	0.4	150%
Kenya	0.1	0.3	0.3	200%
Morocco	0.3	0.3	0.0	0%
Thailand	0.0	0.3	0.3	-
Italy	0.4	0.2	-0.2	-50%
Bangladesh	0.1	0.2	0.1	100%
RoW	4.2	4.5	0.2	5%
Total	6.8	23.7	16.9	247%

Source: DGCI&S and SRTEPC Analysis

5.2 Major Markets for MMF Yarns

5.2.1 Filament Yarn

5.2.1.1 Leading Markets for Polyester Filament Yarn (PFY)

- Top 10 export markets of Indian PFY represents 75% of the total PFY exports from India.
- The exports of PFY to all the top 10 markets have declined during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 10: Leading Markets for Polyester Filament Yarn (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
Turkey	306.4	259.1	-47.3	-15%
Brazil	176.3	73.4	-102.9	-58%
Morocco	47.8	42.8	-5.0	-10%
USA	41.5	40.8	-0.6	-2%
Bangladesh	62.9	33.2	-29.7	-47%
Argentina	46.8	27.4	-19.4	-41%
Egypt	111.9	26.0	-85.9	-77%
UAE	24.7	22.4	-2.4	-10%
Belgium	30.4	18.0	-12.4	-41%
Spain	25.0	15.4	-9.5	-38%
RoW	317.5	190.9	-126.7	-40%
Total	1191.1	749.3	-441.8	-37%

Source: DGCI&S and SRTEPC Analysis

5.2.1.2 Leading Markets for Nylon Filament Yarn (NFY)

- Top 10 export markets of Indian NFY represents 70% of the total NFY exports from India.
- The exports of NFY to all the top 10 markets have grown, except Turkey and Vietnam, during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.
- USA, Egypt, Portugal, Spain and Netherlands were perceived as an emerging market for Indian NFY during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 11: Leading Markets for Nylon Filament Yarn (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
USA	4.5	10.0	5.5	122%
UAE	4.2	5.5	1.3	32%
Brazil	3.4	3.7	0.3	9%
Turkey	5.0	2.6	-2.4	-48%
Australia	2.0	2.2	0.1	7%

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
Egypt	1.0	1.8	0.8	75%
Vietnam	2.0	1.7	-0.2	-12%
Portugal	0.6	1.5	0.9	144%
Spain	0.8	1.4	0.6	69%
Netherlands	0.4	1.3	0.9	202%
RoW	15.6	13.9	-1.7	-11%
Total	39.6	45.7	6.1	15%

Source: DGCI&S and SRTEPC Analysis

5.2.1.3 Leading Markets for Viscose Filament Yarn (VFY)

- Top 10 export markets of Indian VFY represents 68% of the total VFY exports from India.
- The exports of VFY to all the top 10 markets have grown, except Egypt, Spain and Russia, during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.
- UAE, Brazil and Nigeria were perceived as an emerging market for Indian VFY during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 12: Leading Markets for Viscose Filament Yarn (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
UAE	2.3	6.1	3.9	172%
USA	2.7	4.2	1.6	58%
Turkey	2.4	3.4	1.0	43%
Morocco	2.3	3.4	1.1	48%
Egypt	2.1	2.0	-0.1	-5%
Brazil	1.2	1.8	0.6	49%
Spain	1.6	1.6	-0.1	-4%
Portugal	1.3	1.3	0.1	6%
Russia	2.5	1.0	-1.5	-60%
Nigeria	0.6	1.0	0.4	60%
RoW	12.4	12.0	-0.4	-3%
Total	31.38	37.9	6.5	21%

Source: DGCI&S and SRTEPC Analysis

5.2.1.4 Leading Markets for Polypropylene Filament Yarn (PPFY)

- Top 10 export markets of Indian PPFY represents 64% of the total PPFY exports from India.
- Australia was perceived as an emerging market for Indian PPFY during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 13: Leading Markets for Polypropylene Filament Yarn (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
USA	2.7	1.9	-0.7	-28%
Spain	1.7	1.8	0.1	5%
Bangladesh	1.2	1.2	0.0	3%
Nepal	2.1	1.2	-1.0	-45%
Mexico	1.5	1.0	-0.5	-34%
Italy	0.7	0.8	0.1	8%
Australia	0.2	0.5	0.3	165%
Turkey	0.9	0.4	-0.5	-52%
Belgium	0.7	0.3	-0.4	-60%
Sri Lanka	0.4	0.3	-0.2	-40%
RoW	4.4	5.3	0.9	20%
Total	16.56	14.64	-1.9	-12%

Source: DGCI&S and SRTEPC Analysis

5.2.2 Spun Yarn

5.2.2.1 Leading Markets for Poly-Viscose (PV) Yarn

- Top 10 export markets of Indian PV yarns represents 84% of the total PV yarns exports from India.
- The exports of VFY to the top 3 markets viz-a-viz Turkey, Kenya and Nepal, have grown during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.
- Kenya has shown a decent growth of 47%, for Indian PV yarns, during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 14: Leading Markets for Poly-Viscose Yarn (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
Turkey	78.9	93.3	14.4	18%
Kenya	2.0	3.0	1.0	47%
Nepal	2.2	2.9	0.7	33%
Vietnam	6.7	2.8	-3.8	-57%
Iran	3.2	2.7	-0.6	-18%
Russia	2.5	2.4	0.0	-1%
UAE	1.8	2.3	0.5	30%
Italy	3.1	2.3	-0.8	-27%
Egypt	2.6	1.7	-0.9	-35%
Korea	0.8	0.8	0.0	-5%
RoW	32.1	22.3	-9.8	-30%
Total	135.8	136.5	0.7	1%

Source: DGCI&S and SRTEPC Analysis

5.2.2.2 Leading Markets for Poly-Cotton (PC) Yarn

- Top 10 export markets of Indian PC yarns represents 72% of the total PV yarns exports from India.
- Among these top 10 markets, Bangladesh has shown a healthy growth of 127%, for Indian PC yarns, during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 15: Leading Markets for Poly-Cotton Yarn (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
Brazil	22.3	21.5	-0.8	-4%
Colombia	15.3	12.7	-2.6	-17%
Argentina	20.8	12.6	-8.2	-40%
Egypt	27.9	12.1	-15.9	-57%
Turkey	14.6	11.9	-2.7	-19%
Morocco	14.3	7.2	-7.1	-50%
Portugal	20.4	6.7	-13.8	-67%
Mexico	1.6	3.5	2.0	127%
Bangladesh	11.6	3.1	-8.5	-73%
Spain	3.3	2.0	-1.2	-38%
RoW	61.4	36.1	-25.3	-41%
Total	213.56	129.37	-84.2	-39%

Source: DGCI&S and SRTEPC Analysis

5.2.2.3 Leading Markets for Polyester Spun Yarn

- Top 10 export markets of Indian Polyester spun yarns represents 72% of the total Polyester spun yarn's export.
- The exports of Polyester spun yarns to Brazil, Mexico, Kenya and Nepal have grown by 14%, 69%, 39%, and 37%, respectively during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.
- Mexico was perceived as an emerging market for Indian Polyester spun yarn during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 16: Leading Markets for Polyester Spun Yarn (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
Brazil	23.3	26.4	3.2	14%
Turkey	21.0	16.9	-4.2	-20%
USA	18.7	15.7	-3.0	-16%
Morocco	15.3	13.2	-2.1	-14%
Italy	4.3	4.1	-0.2	-5%
Mexico	2.1	3.5	1.5	69%
Egypt	9.8	3.4	-6.4	-65%
Kenya	2.0	2.8	0.8	39%

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
Nepal	1.7	2.3	0.6	37%
Belgium	3.2	1.9	-1.3	-40%
RoW	40.1	35.3	-4.8	-12%
Total	141.49	125.52	-16.0	-11%

Source: DGCI&S and SRTEPC Analysis

5.2.2.4 Leading Markets for Viscose Spun Yarn

- Top 10 export markets of Indian Viscose spun yarns represents 77% of the total Viscose spun yarn's export.
- The exports of Viscose spun yarns to Morocco and UAE have grown by 44% and 180%, respectively during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.
- UAE was perceived as an emerging market for Indian Viscose spun yarn during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 17: Leading Markets for Viscose Spun Yarn (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
Bangladesh	37.7	23.1	-14.7	-39%
Turkey	18.8	16.0	-2.9	-15%
Sri Lanka	7.0	6.3	-0.8	-11%
Italy	6.3	4.8	-1.5	-23%
Belgium	10.5	4.1	-6.4	-61%
Portugal	5.4	3.8	-1.5	-28%
USA	7.6	3.6	-4.0	-53%
Egypt	3.7	3.4	-0.3	-8%
Morocco	1.9	2.8	0.8	44%
UAE	0.7	2.0	1.3	180%
RoW	30.2	20.9	-9.3	-31%
Total	129.94	90.75	-39.2	-30%

Source: DGCI&S and SRTEPC Analysis

5.2.2.5 Leading Markets for Acrylic Spun Yarn

- Top 10 export markets of Indian Acrylic spun yarns represents 60% of the total Acrylic spun yarn's export.
- The exports of Acrylic spun yarns to Kenya, Italy, Mexico, Brazil, Sri Lanka and France have grown by 7%, 196%, 27%, 229%, 86% and 39%, respectively during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.
- Italy and Brazil were perceived as an emerging market for Indian Acrylic spun yarn during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 18: Leading Markets for Acrylic Spun Yarn (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
Kenya	10.3	11.0	0.7	7%
USA	7.1	6.0	-1.2	-16%
Ethiopia	4.6	3.2	-1.5	-32%
Italy	0.9	2.7	1.8	196%
Bangladesh	3.0	2.3	-0.7	-23%
Mexico	1.7	2.1	0.5	27%
Brazil	0.5	1.7	1.2	229%
Sri Lanka	0.9	1.6	0.7	86%
Nepal	2.4	1.4	-1.0	-43%
France	0.9	1.2	0.3	39%
RoW	14.3	21.7	7.5	52%
Total	46.54	54.85	8.3	18%

Source: DGCI&S and SRTEPC Analysis

5.3 Major Markets for MMF Fabrics

5.3.1 Woven Fabrics

5.3.1.1 Leading Markets for Polyester Filament Fabrics

- Top 10 export markets of Indian Polyester Filament fabrics represents 53% of the total Polyester Filament fabric's export.
- The exports of Indian Polyester Filament fabrics to all the top 10 market have grown, except Nepal, during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.
- Bangladesh, Saudi Arabia and Thailand were perceived as an emerging market for Indian Polyester Filament fabrics during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 19: Leading Markets for Polyester Filament Fabrics (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
UAE	72.1	93.9	21.8	30%
Bangladesh	40.7	69.6	28.9	71%
USA	15.7	18.1	2.4	15%
Saudi Arabia	8.9	17.2	8.3	93%
Sri Lanka	15.1	16.9	1.8	12%
Senegal	10.0	14.3	4.4	44%
Nepal	21.7	12.8	-8.9	-41%
UK	10.9	12.0	1.1	10%
Thailand	4.8	11.9	7.0	145%
Afghanistan	10.4	9.7	-0.8	-7%
RoW	194.6	240.6	46.0	24%
Total	404.8	516.9	112.0	28%

Source: DGCI&S and SRTEPC Analysis

5.3.1.2 Leading Markets for Poly-Viscose (PV) Fabrics

- Top 10 export markets of Indian PV fabrics represents 69% of the total PV fabrics export.
- The exports of Indian PV fabrics to all the top 10 market have grown, except Egypt and Afghanistan, during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.
- Vietnam, Mexico, Saudi Arabia and Turkey were perceived as an emerging market for Indian PV fabrics during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 20: Leading Markets for Poly-Viscose Fabrics (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
Bangladesh	37.0	43.7	6.7	18%
UAE	26.7	38.2	11.5	43%
Egypt	31.8	21.2	-10.7	-34%
Vietnam	10.0	17.6	7.6	76%
Sri Lanka	16.0	17.2	1.2	7%
Afghanistan	17.4	15.2	-2.2	-13%
Mexico	5.1	11.6	6.4	125%
Kenya	7.0	8.3	1.3	18%
Saudi Arabia	5.2	7.8	2.7	52%
Turkey	2.9	4.6	1.6	56%
RoW	66.5	85.0	18.5	28%
Total	225.61	270.24	44.6	20%

Source: DGCI&S and SRTEPC Analysis

5.3.1.3 Leading Markets for Poly-Cotton (PC) Fabrics

- Top 10 export markets of Indian PC fabrics represents 76% of the total PC fabrics export.
- The exports of Indian PC fabrics to all the top 10 market have grown, except Italy and Nepal, during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.
- USA, Bangladesh and Thailand were perceived as an emerging market for Indian PC fabrics during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 21: Leading Markets for Poly-Cotton Fabrics (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
Italy	17.7	17.2	-0.4	-2%
USA	5.7	8.4	2.8	49%
Bangladesh	2.4	7.7	5.3	222%
UAE	2.0	2.6	0.5	25%
Sri Lanka	1.1	1.6	0.5	41%

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
Australia	0.9	1.2	0.3	40%
Oman	0.5	0.7	0.2	45%
Thailand	0.1	0.6	0.5	417%
Brazil	0.0	0.6	0.6	-
Nepal	0.8	0.6	-0.3	-33%
RoW	8.7	12.7	4.0	46%
Total	39.9	53.9	14.0	35%

Source: DGCI&S and SRTEPC Analysis

5.3.1.4 Leading Markets for Polyester Spun Fabrics

- Top 10 export markets of Indian Polyester Spun fabrics represents 63% of the total Polyester spun fabric's export.
- The exports of Indian Polyester Spun fabrics to all the top 10 market have grown, except USA and Sri Lanka, during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.
- UAE, Egypt, Saudi Arabia and UK were perceived as an emerging market for Indian Polyester spun fabrics during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 22: Leading Markets for Polyester Spun Fabrics (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
UAE	2.0	8.8	6.8	344%
Kenya	4.6	5.3	0.7	16%
Afghanistan	2.3	3.4	1.1	47%
Egypt	2.1	3.1	1.0	50%
USA	3.9	2.5	-1.4	-35%
Saudi Arabia	1.1	1.9	0.8	78%
Nepal	1.3	1.8	0.5	40%
Tanzania	1.5	1.7	0.2	13%
Sri Lanka	1.9	1.4	-0.6	-29%
UK	0.2	1.0	0.8	359%
RoW	10.5	18.4	7.9	76%
Total	31.2	49.2	18.0	58%

Source: DGCI&S and SRTEPC Analysis

5.3.1.5 Leading Markets for Viscose Spun Fabrics

- Top 10 export markets of Indian Viscose Spun fabrics represents 81% of the total Viscose spun fabric's export.
- The exports of Indian Viscose Spun fabrics to all the top 10 market have grown, except S. Korea, Turkey, UK and Nepal, during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.
- Thailand was perceived as an emerging market for Indian Polyester spun fabrics during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 23: Leading Markets for Viscose Spun Fabrics (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
Bangladesh	10.1	11.4	1.2	12%
S. Korea	13.7	9.2	-4.5	-33%
Sri Lanka	6.9	9.0	2.2	32%
Saudi Arabia	2.2	2.5	0.4	17%
UAE	1.9	2.5	0.6	33%
Turkey	3.1	2.2	-0.9	-30%
Thailand	0.3	0.8	0.5	182%
UK	0.8	0.6	-0.2	-24%
USA	0.4	0.5	0.1	17%
Nepal	0.9	0.4	-0.5	-58%
RoW	7.2	9.4	2.2	31%
Total	47.5	48.5	1.0	2%

Source: DGCI&S and SRTEPC Analysis

5.3.1.6 Leading Markets for Nylon Filament Fabrics

- Top 10 export markets of Indian Nylon Filament fabrics represents 79% of the total Polyester spun fabric's export.
- The exports of Indian Nylon Filament fabrics to all the top 10 market have declined, except USA which had grown by 119%, during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 24: Leading Markets for Nylon Filament Fabrics (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
Bangladesh	9.1	5.3	-3.9	-42%
Vietnam	4.3	2.3	-1.9	-45%
Germany	1.0	1.5	0.5	44%
Sri Lanka	2.2	1.3	-0.9	-42%
Mexico	2.6	1.2	-1.4	-55%
Nepal	1.6	1.0	-0.6	-37%
Israel	0.9	0.9	0.0	-3%

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
USA	0.4	0.8	0.4	119%
UAE	0.7	0.7	-0.1	-8%
Italy	0.4	0.3	0.0	-11%
RoW	5.2	4.1	-1.2	-22%
Total	28.3	19.2	-9.1	-32%

Source: DGCI&S and SRTEPC Analysis

5.3.2 Weft Knitted Fabrics

- Top 10 export markets of Indian Weft Knitted fabrics represents 92% of the total Weft Knitted fabrics export.
- The exports of Indian Weft Knitted fabrics to all the top 10 market have declined during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 25: Leading Markets for Nylon Filament Fabrics (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
Sri Lanka	107.7	84.6	-23.1	-21%
Bangladesh	26.4	20.1	-6.3	-24%
Kenya	3.9	3.3	-0.6	-15%
Nepal	2.4	2.4	0.0	-2%
UK	2.2	1.5	-0.7	-31%
Egypt	1.2	1.4	0.2	19%
Ethiopia	3.8	1.2	-2.6	-68%
UAE	1.9	1.1	-0.8	-40%
Vietnam	2.4	1.0	-1.4	-57%
USA	1.2	1.0	-0.2	-18%
RoW	10.7	10.0	-0.7	-6%
Total	163.59	127.55	-36.0	-22%

Source: DGCI&S and SRTEPC Analysis

5.3.3 Non-wovens

- Top 10 export markets of Indian Nonwovens represents 79% of the total Nonwoven export.
- Bangladesh and Vietnam were perceived as an emerging market for Indian Polyester spun fabrics during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 26: Leading Markets for Nylon Filament Fabrics (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
USA	104.6	72.6	-32.0	-31%
UAE	6.4	8.8	2.5	39%
UK	5.7	5.0	-0.6	-11%
Saudi Arabia	2.4	2.7	0.3	11%

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
Bangladesh	1.2	2.6	1.4	116%
Vietnam	1.3	2.3	1.1	85%
Germany	2.3	2.2	-0.1	-3%
Nepal	1.4	1.9	0.5	33%
Canada	3.8	1.5	-2.3	-60%
France	3.3	1.1	-2.2	-66%
RoW	46.8	26.7	-20.2	-43%
Total	179.0	127.4	-51.6	-29%

Source: DGCI&S and SRTEPC Analysis

5.4 Major Markets for MMF Made-ups

- Top 10 export markets of Indian Nonwovens represents 79% of the total Nonwoven export.
- Exports of MMF Made-ups to all the top 10 markets have declined, except Italy, during Apr 22 - Feb 23 as compared to Apr 21 - Feb 22.

Table 27: Leading Markets for Nylon Filament Fabrics (Values in US\$ Mn.)

Country	Apr 21 - Feb 22	Apr 22 - Feb 23	Net Change	% Growth
USA	430.7	385.5	-45.2	-10%
Italy	79.0	86.2	7.2	9%
Germany	99.2	82.9	-16.3	-16%
UK	104.6	80.0	-24.6	-24%
Spain	75.3	67.6	-7.7	-10%
UAE	109.1	63.4	-45.6	-42%
Netherlands	78.7	61.6	-17.1	-22%
France	57.8	52.6	-5.2	-9%
Canada	40.4	35.6	-4.8	-12%
Belgium	36.9	35.1	-1.8	-5%
RoW	471.4	451.0	-20.4	-4%
Total	1,583.0	1,401.5	-181.5	-11%

Source: DGCI&S and SRTEPC Analysis