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## INDIAN TEXTILE AND CLOTHING INDUSTRY EXPORTS: EMERGING TRENDS

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## ABSTRACT

*This study examines the Changing Trend of the Indian Textile and Clothing (T&C, hereafter) industry's Commodities' exports and their destinations. The study also focuses on the performance of the Industry in the last two decades and the effects of the major policy changes and global economic crisis on the performance of the textile and clothing industry. The performance and trends were analyzed with the help of standard techniques of growth rates and market shares calculation. The results show that the shares of cotton and carpets in the T&C export basket have declined and for manmade filaments, manmade staple fibers, knitted apparel articles and other made up textiles have increased in the last two decades. The average annual growth rate for the aggregate t&c exports is higher in the post MFA phase out period than in the pre MFA phase out one. The same for silk has been negative in the post MFA phase out period while for items such as cotton, wool, carpets, laminated textile fabrics etc. has been higher than the pre MFA phase out period. The apparel articles have grown at almost the same pace in the pre and post MFA phase out period. The export destinations of Indian t&c exports, in the last two decades, have been in expansion mode. The share of exports to US and EU has been decreasing while for Latin American, African and Gulf countries have been increasing. The last decade's performance for Indian t&c exports has been ordinary, although, the recessionary effects did not affect the Indian t&c exports for long and the exports in that period, in fact, grew at a very fast pace.*

## KEYWORDS

MFA, focus market scheme, cotton, apparel.

## 1. INTRODUCTION

Indian Textiles Industry has an overwhelming presence in the economic life of the country. Apart from providing one of the basic necessities of life, the textile industry also plays a pivotal role through its contribution to industrial output, employment generation and export earnings of the country. It contributes about 14% to India's industrial production and 13% to the country's export earnings. The textile sector is one of the largest providers of employment along with agriculture.

Having an abundant raw material availability that helps industry to control costs and reduce the lead time across operation and the availability of low cost and skilled manpower providing competitive advantage to industry, makes the Indian Textile and clothing industry independent and self reliant.

The Indian textiles industry represents a widely diverse spectrum of activities with the hand-spun and hand-woven sector at one end, and the capital intensive sophisticated mill sector at the other. The decentralized power looms, hosiery and knitting sectors form the largest section of the Textiles Industry. The close linkage of the Industry to agriculture and the ancient culture, and traditions of the country make the Indian textiles sector unique in comparison to the textiles industry of other countries. This also provides the industry with the capacity to produce a variety of products suitable to the different market segments, both within and outside the country.

But all this, has a gloomy side too. The Indian textile industry is a highly fragmented industry. It is highly dependent on cotton, along with, low productivity in various segments. Also the mill segment is declining. In addition, there is a lack of technological development that affects the productivity and other activities in whole value chain. The infrastructural bottlenecks and efficiency cost, like transaction time at ports and transportation time, and unfavorable labor laws, further prevent to generate economies of scale. Higher interest rates, power tariffs and indirect taxes also complicate and deteriorate the situation. All these factors make it problematic for the Indian textile and clothing industry to grow up to its potential and take the big leap forward.

The Indian T&C Industry can be classified into 14 commodities, namely, Silk, Wool, Fine or Coarse animal hair, Horsehair Yarn and woven fabric, Cotton, Other vegetable textile fibers; Paper yarn and woven fabrics of paper yarn, Manmade filaments, Man-made staple fibers, Wadding, Felt and nonwovens; Spacial yarns; Twine, Cordage, Ropes and articles thereof, Carpets and Other Textile Floor coverings, Special woven fabrics; Tufted Textile fabrics; lace; tapestries; trimmings; embroidery, Impregnated, Coated, Covered or Laminated Textile Fabrics; Textile articles of a kind suitable for industrial use, knitted or crocheted fabrics, Articles of apparel and clothing accessories, knitted or crocheted, Articles of apparel and clothing accessories, non knitted or crocheted and Other made up Textile articles; Sets; Worn clothing and worn textile articles; Rags at a 2 digit level. Taking into account all these commodities, we can get the total textiles exports of India.

The study's centre of interest here remains to see how the exports of Indian Textile Industry, overall and commodity wise, have changed over time to the world and to particular significant regions, since 1996-97 after the adoption of the Agreement on Textile & Clothing (ATC) in 1995 and all import quotas in textile and clothing, thereby, terminated from January 1, 2005. The value of world apparel exports was estimated to be \$166 billion in 1996 (WTO, 1998). Until the end of the 1980s, the top four garment exporters were Hong Kong, Italy, South Korea, and Taiwan. China emerged as a leading exporter in the second half of the 1980's and today occupies the number one position in the world (Ramachandran, 2001). The study also tries to find the effects of the Global Economic Crisis and the new aspects of Foreign Trade Policy of India like Focus Market Schemes (FMS) on the Indian textile and clothing exports and the way ahead that can be predicted from the existing situation.

This paper covers a time frame of 19 years i.e. from 1996-97 to 2014-15 and 14 items as mentioned above. Standardized techniques of growth rates and market shares were used in the study for the above mentioned time frame as well as for different significant time frames. The same were used to analyze the T&C exports to different countries as well.

The paper's structure will include Review of Literature, Objectives of the Study, Empirical analysis, Conclusion and Bibliography.

## 2. REVIEW OF LITERATURE

Gera(2012) in his paper on Significance and future prospects of textile exports in Indian Economy, noted through SWOT and data analysis, that, role of government has been supportive to textile & clothing industry whereas post MFA has not been good in comparison to China and thereby giving recommendations on what is the need of the hour while Ramachandran (2001) in his study on Export Competitiveness and The Market for Textiles through firm level interviews found India has successfully undertaken policy reforms in order to improve efficiency and competitiveness. However, India's share of world apparel exports has not risen significantly since 1994 and thus identified policy constraints and recommendations that can be made thereon. Singh&Lal (2013) revealed in Export performance & competitiveness of Indian Textile Industry' using RCA index that which commodities enjoy a greater Relative Comparative Advantage and which commodities do not but this remains to be seen whether the commodities with greater RCA are performing to their potential or not. Also, Verma (2002) in his study on Export Competitiveness of Indian Textile & Garment Industry by taking into account both the demand and supply side of some products through a 2 point criterion classified the products into Leaders, Gainers, Losers and Outliers. In addition, he showed that how some commodities' exports were actually being protected by quota system and how some were being bound by the same Shrimali (2003) in Performance in US Market: Post ATC analyzed that India was not able to compete China in Textile & Clothing Exports in US post ATC, although its share grew and also was facing stiff competition from Bangladesh. But what is to be observed is that whether Indian T&C exports to other non-traditional regions have increased or not and if yes, then, to what



extent. Chaudhary (2011) in the paper, Changing Structure of Indian Textiles Industry after MFA phase out through F-test concluded that the impact of MFA phase out was positive on variables like Total exports of T&C, production of cloth, FDI in textile industry and operating profits. However, it is assumed that MFA phase out impact on textile industry was bound to be positive but whether Indian textile exports have shown a massive growth as was expected for some commodities or not, and if there was growth, was it sustained or not, that too, in the light of global economic crisis that were after a nominal gap of almost 3.5 years.

### 3. OBJECTIVES OF THE STUDY

- To examine the trend of textile and clothing exports from 1996-97 to 2014-15, aggregate and commodity wise to the world and to different specific regions.
- To study the impact of MFA phase out and Global Economic Crisis on textile and clothing exports over this period.
- To analyze the direction of T&C exports after the implementation of new issues such as Focus Market Scheme (FMS) in Foreign Trade Policy.
- To examine the change in export destinations of Indian Textile and Clothing exports.

### 4. EMPIRICAL ANALYSIS

The total textiles and clothing exports of India to the world stood at US \$9159.97 million in 1996-97 in which the major share was taken by Articles of Apparel and clothing accessories both knitted and not knitted (41%) followed by cotton (30.85%) and all other items had a single digit share in the export basket of T&C.

#### CHANGING SHARE OF DIFFERENT SECTORS OF INDIAN TEXTILE AND CLOTHING INDUSTRY IN THE EXPORT BASKET

The following table showing the share of the different commodities over different time periods makes it clear how the demand of the different products of Indian T&C sector has been changing over the years.

TABLE I- SHARE OF DIFFERENT COMMODITIES IN THE EXPORT BASKET OF INDIAN TEXTILE AND CLOTHING (in %)

Items	1996-97	2000-01	2004-05	2005-06	2008-09	2011-12	2014-15
Silk	1.34	2.44	2.56	2.20	1.55	0.58	0.36
Wool, fine or coarse animal hair, horse hair yarn and woven fabric	1.08	0.48	0.50	0.45	0.56	0.64	0.47
Cotton	30.85	20.81	15.80	16.72	14.60	25.94	20.50
Other vegetable textile fibers; paper yarn and woven fabrics of paper yarn	1.20	1.24	1.20	0.88	0.91	1.10	0.99
Man-made filaments	3.79	4.43	6.94	5.14	7.15	7.60	6.35
Man-made staple fibers	3.48	4.17	5.54	4.61	5.79	6.42	5.79
Wadding, felt and nonwovens; special yarns; twine, cordage, ropes and cables and articles thereof	0.32	0.44	0.38	0.48	0.75	0.88	0.90
Carpets and other textile floor coverings	7.11	5.51	5.77	6.28	4.97	3.59	4.83
Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery	0.45	1.70	0.80	0.86	1.00	0.69	1.08
Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use	0.61	0.36	0.49	0.44	0.48	0.48	0.97
Knitted or crocheted fabrics	0.64	0.29	0.31	0.28	0.46	0.64	0.68
Articles of apparel and clothing accessories, knitted or crocheted	11.29	15.44	18.45	17.88	23.41	16.79	20.33
Articles of apparel and clothing accessories, non knitted or crocheted	29.69	32.75	27.46	30.45	27.37	23.14	24.41
Other made up textile articles; sets; worn clothing and worn textile articles; rags	8.14	9.94	13.79	13.34	11.00	11.49	12.34

Source: Calculated by the author from the Export Import Data Bank, Ministry of Commerce, Government of India

A glance at the Table I, clearly reveals that the major share in the exports of Indian textile & clothing sector has been taken by Cotton and Apparel articles & Clothing accessories which lied more or less in the range of 60 to 70 percent. However, cotton exports had a more fluctuating share in the total t&c exports. On the other hand, man-made filaments, man-made staple fibers and worn clothing and worn textile articles have shown positive trend with their share in the t&c exports rising at a decent pace over the 19 year window.

#### CHANGING TREND OF EXPORTS OF DIFFERENT COMMODITIES AFTER THE MFA PHASE OUT AND THE SILK PLUMMET

The growth rates of exports of different commodities are another aspect that needs to be scrutinized to get a clear picture of direction of different commodities.

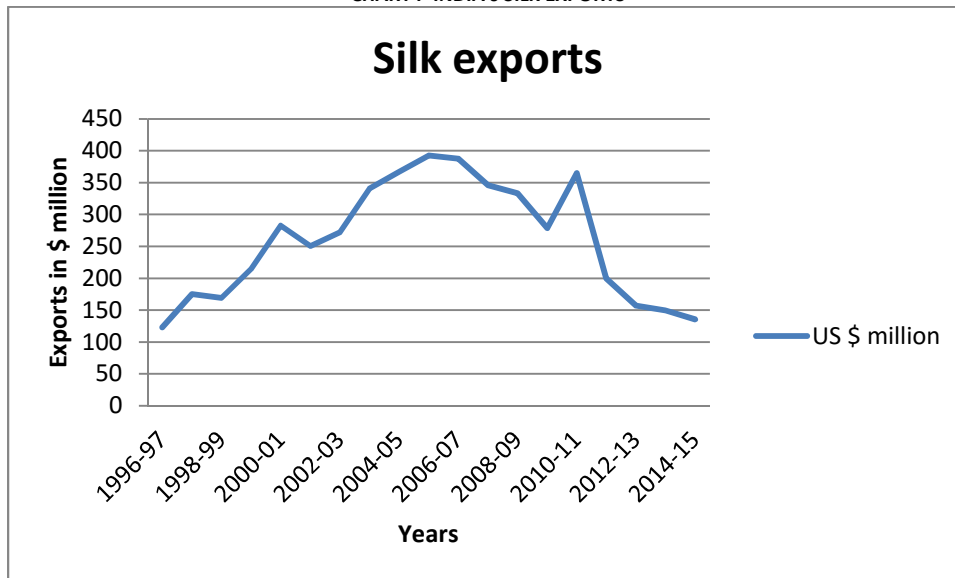
TABLE II-AVERAGE ANNUAL GROWTH RATES OF DIFFERENT ITEMS OF TEXTILE AND CLOTHING INDUSTRY (in %)

Items	Pre MFA phase out	Post MFA phase out
Silk	12.44	-13.00
Wool, fine or coarse animal hair, horse hair yarn and woven fabric	-6.59	9.3
Cotton	-1.65	12.89
Other vegetable textile fibers; paper yarn and woven fabrics of paper yarn	2.9	11.29
Man-made filaments	14.6	11.66
Man-made staple fibers	11.51	10.44
Wadding, felt and nonwovens; special yarns; twine, cordage, ropes and cables and articles thereof	7.7	16.64
Carpets and other textile floor coverings	2.22	4.57
Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery	7.26	9.8
Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable for industrial use	4.54	16.17
Knitted or crocheted fabrics	-1.18	18.27
Articles of apparel and clothing accessories, knitted or crocheted	13.5	8.42
Articles of apparel and clothing accessories, non knitted or crocheted	3.77	6.33
Other made up textile articles; sets; worn clothing and worn textile articles; rags	11.72	9.12
<b>Total textile and clothing exports</b>	<b>5.77</b>	<b>9.00</b>

Source: Calculated by the author from the Export Import Data Bank, Ministry of Commerce, Government of India

The data in Table II shows how the MFA phase out was a boon to some commodities and bane to others. Silk exports which had an average annual growth rate 12.44% in the pre MFA phase out period, registered a negative average annual growth rate of 13% in the post MFA phase out period. The reason for this can primarily be attributed to a very hard competition from China. China is the market leader in global silk market and dominates the export market. Its total production capacity is far larger than the sum of total production capacity of other major key players. Hence, the total of many other leading exporting countries' figures would not match with China's export figure (Silk manufacturers and exporters association of Bangladesh). Total silk exports which were US \$122.97 million in 1996-97 did not see much overall change as it stood at US \$135.59 million in 2014-15.

CHART I- INDIA'S SILK EXPORTS



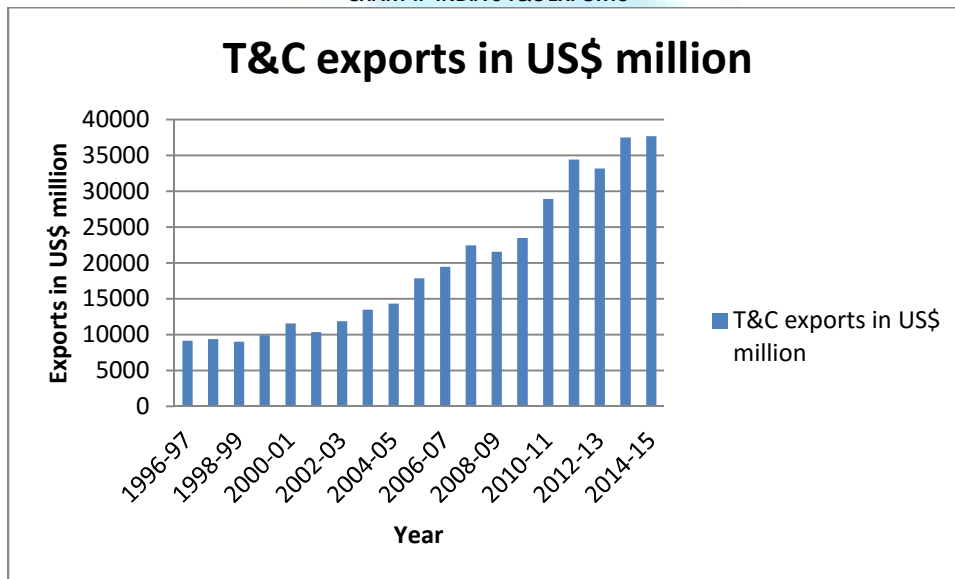
Source: Export Import Data Bank, Ministry of Commerce, Government of India

It can be seen how the silk exports have almost remained the same in 1996-97 and 2014-15 after seeing a boom till 2004-05 and then ultimately falling. On the other hand, items which showed a very high change in the growth rate include wool, cotton, other vegetable textile fibers and laminated textile fabrics.

**IMPACT OF MFA PHASE OUT ON THE AGGREGATE TEXTILE AND CLOTHING EXPORTS**

The aggregate textile and clothing exports showed a decent jump in the growth rate after the MFA phase out. The average annual growth rate jumped from 5.77% in pre MFA phase out period to 9% in post-MFA phase out period.

CHART II- INDIA'S T&C EXPORTS



Source: Export Import Data Bank, Ministry of Commerce, Government of India

The impact of MFA phase out can be seen from the fact that how in absolute terms the aggregate t&c exports reached a mark of almost US\$ 38000 million in 2014-15 from US\$ 14300 million in 2004-05.

**CHANGING INDIAN T&C EXPORTS' DESTINATIONS**

Another scenario that is to be looked into is that how the export destinations of Indian T&C have changed over the time frame of 19 years. The following table explains the same.

TABLE III: PERCENTAGE OF INDIA'S TEXTILE AND CLOTHING EXPORTS TO DIFFERENT DESTINATIONS

Year	US	EU	North East Asia	Latin America	GCC	Africa	Oceania
1996-97	22.30	35.48	10.83	1.59	5.99	5.09	1.94
2004-05	24.14	33.46	5.60	1.72	11.31	6.02	1.22
2005-06	26.54	35.66	7.54	1.76	8.40	4.88	1.05
2008-09	20.41	36.40	5.37	3.37	10.51	6.35	1.00
2011-12	17.34	27.88	15.55	4.56	8.73	7.53	1.02
2013-14	17.89	25.25	14.04	4.18	9.36	7.03	1.02
2014-15	19.00	26.22	9.74	4.25	11.98	7.55	1.16

Source: Calculated by the author from the Export Import Data Bank, Ministry of Commerce, Government of India

It is a well known fact that the major importers of India's textile and clothing have been USA and European Union (EU) from many years. But what is to be seen is whether their share and other regions' share in India's T&C exports has remained same over the years or not. As observed from the table, the percentage of t&c exports to US was as high as 26.54% in 2005-06 from 22.30% in 1996-97 but after that, it showed a declining trend. The reason for this can be attributed to global economic crisis of 2008-09 which in turn led to less demand. But that's only a partial truth because even when the US economy started recovering after 2012, the percentage of exports didn't rise or if it rose, it was nominal. That's probably because the Foreign Trade policy, 2009 of India started focusing on new

markets under Focus Market Scheme (FMS) in which countries of different blocks were identified. The blocks included Latin American block, African block, Eastern Europe block, Oceania block etc. that is, the traditionally less focused markets.

Another result that can be interpreted from this falling trend of percentage of t&c exports to US is that the impact of MFA phase out has not been that beneficial to India as India thought of, initially.

The EU too has shown a falling trend in the recent years but the decline in the percentage of t&c exports to US and EU has not been just taken by one specific region. This means the impact of Focus Market Scheme was scattered as it was intended to. It can be noted from the fact the percentage of Indian T&C exports to Latin America which was 1.59% in 1996-97, stood at 4.56% in 2011-12 and 4.25% in 2014-15. A similar trend was shown by Africa. This makes it essential for India to understand that demand needs to be tapped in these markets in future as well, as these markets too have a high potential.

However, regions such as Gulf and North East Asia had a fluctuating single and double digit share. But the variation makes it easy to understand that these markets too have a high capability to import India's t&c.

However, percentage of t&c exports to the Oceania region that includes countries such as Australia, New Zealand, Fiji etc. has remained more or less the same, rather, there has been a nominal decline from 1.94% in 1996-97 to 1.16% in 2014-15 although some markets of this region had been notified under *New Focus Markets* in Foreign Trade Policy, 2009.

#### PERFORMANCE IN THE LAST DECADE, AGGREGATE AND TO SPECIFIC COUNTRIES

To further get clarity in the performance of Indian t&c exports in the last decade, the data can be divided into significant periods as shown in the following table.

TABLE IV: AVERAGE ANNUAL GROWTH RATES OF INDIAN TEXTILE AND CLOTHING EXPORTS TO DIFFERENT REGIONS (in %)

Time Period	Aggregate t&c exports	US	EU	North East Asia	Latin America	GCC	Africa	Oceania
2005-06 to 2007-08	11.45	-0.30	7.51	17.03	39.38	11.92	23.63	0.73
2007-08 to 2008-09	-3.92	-6.52	6.11	-38.78	5.15	19.08	-1.97	14.13
2008-09 to 2014-15	9.79	8.69	4.10	19.79	13.93	10.85	12.68	12.40
2008-09 to 2011-12	16.08	10.82	7.12	49.98	27.69	9.49	21.29	16.11
2011-12 to 2014-15	3.93	6.34	1.98	-10.29	0.82	13.93	4.48	7.18

Source: Calculated by the author from the Export Import Data Bank, Ministry of Commerce, Government of India

The Agreement on Textiles and Clothing (ATC) provided for the gradual dismantling of the quotas that existed under the MFA. This process was completed on 1 January 2005. So after 1 January 2005; India certainly had an added advantage in its t&c exports. The average annual growth rate in aggregate t&c exports of India was although 11.45% from 2005-06 to 2007-08 but in the same period when it was expected that India's t&c exports to USA, which was precisely one of the main markets of Indian t&c exports, other than EU, saw a negative average annual growth rate. The other markets had shown a positive average annual growth rate with Latin America showing the highest.

The year 2008-09, which saw extreme recessionary effects, made India's performance dismal in aggregate t&c exports and to most of the destinations. To USA too, the t&c exports had a negative growth rate i.e. -6.52% as was expected after the crisis. In fact, North East Asia had a huge fall in this aspect as the growth rate was -38.78%. But did Indian t&c exports really get affected after the global economic crisis of 2008-09 is the question. A glance at the average annual growth rates from 2008-09 to 2011-12 shows the Indian t&c exports saw a good jump when most of the developed world was facing the crisis. The aggregate Indian t&c exports growth rate was 16.08% in this period. Most importantly, the exports to USA and North East Asia grew at an average of 10.82% and 49.92% respectively. The Gulf countries and Oceania world too showed a decent jump. But the surprise package was the Latin American and African world. The exports to both the markets grew at an average of greater than 20% per annum as they both were the two of the newly focused markets after seeing the dynamic impacts of the recession globally.

Evaluating the last 4 years' performance of India, it can be said that the Growth rate of Indian t&c exports has been just nominal. But with the world recovering from recessionary effects complimented with different schemes of Govt. of India and the expectation of new National Textile Policy, 2015 to come up soon, it is expected that Indian t&c exports will bounce back in the near future.

#### CHANGING EXPORT DESTINATIONS OF VARIOUS PRODUCTS

The textile and clothing sector of India being very diverse makes it important to study how foreign demand of various products of Indian t&c sector has changed over time. The sectors of Indian t&c industry that are being considered here are Silk, Cotton, Carpets and other textile floor coverings, Articles of apparel and clothing accessories, knitted or crocheted, Articles of apparel and clothing accessories, not knitted or crocheted, as, products of these sector comprise almost 75% of the Indian t&c exports.

##### SILK

India is the second largest producer of silk in the world but gets beaten out rightly by China in the global market. As explained earlier, the Silk exports presently stand at almost the same level that they were in 1996-97. But the destination of silk exports has remained more or less the same over the years and probably, that is the reason, Indian silk exports are not achieving the boom.

TABLE V: PERCENTAGE OF SILK EXPORTS TO DIFFERENT DESTINATIONS

3 Year average	US	EU	GCC	North East Asia	Africa
1996-97 to 1998-99	27.43	39.36	6.87	7.50	2.10
2002-03 to 2004-05	30.53	33.03	10.83	10.50	1.94
2005-06 to 2007-08	25.62	37.37	7.06	9.82	1.64
2012-13 to 2014-15	19.07	33.86	14.08	11.75	1.93

Source: Calculated by the author from the Export Import Data Bank, Ministry of Commerce, Government of India

The percentage of silk exports to US has declined in the last decade and for European Union too. The decline in proportion of silk exports to both these destinations has been taken by Gulf countries and North East Asia for the last decade (Table V).

##### COTTON

Cotton is one of the principal crops of the country and is the major raw material for domestic textile industry. It provides sustenance to millions of farmers as also the workers involved in cotton industry, right from processing to trading of cotton. The Indian textile industry consumes a diverse range of fibers and yarn, but is predominantly cotton based. Also, cotton exports are one of the major export items of Indian t&c exports.

TABLE VI: PERCENTAGE OF COTTON EXPORTS TO DIFFERENT DESTINATIONS

3 Year average	US	EU	North East Asia	Latin America	Africa	Bangladesh
1996-97 to 1998-99	8.16	20.60	25.27	2.02	12.13	9.67
2002-03 to 2004-05	3.97	18.91	24.19	1.86	17.56	8.39
2005-06 to 2007-08	2.29	13.17	31.37	3.87	11.14	10.00
2012-13 to 2014-15	1.05	6.74	41.98	4.52	8.45	17.33

Source: Calculated by the author from the Export Import Data Bank, Ministry of Commerce, Government of India

As it is clear from Table VI, the demand for cotton exports in USA was already low in 1996-97 and therefore, only 8.16% of total exports of cotton went to USA. Over the years, this share has fallen to 1.05%. From European Union as well, the demand for cotton exports of India was not that high but it constituted a

significant percentage of the overall demand. But, its share has fallen too. The percentage of cotton exports to North East Asia, Latin America and Bangladesh on the other hand has shown a significant growth with most of the share of cotton exports in recent years going to North East Asia as China is the leading importer of India's cotton exports.

#### CARPETS AND OTHER TEXTILE FLOOR COVERINGS

The traditional market for India's carpets and other textile floor coverings have been USA and EU over the years, with together both of them comprising around 86% of textile floor coverings exports in 1996-97.

**TABLE VII: PERCENTAGE OF CARPETS AND OTHER TEXTILE FLOOR COVERINGS EXPORTS TO DIFFERENT DESTINATIONS**

3 Year average	US	EU	GCC	Latin America	Oceania	Africa
1996-97 to 1998-99	37.79	47.79	0.93	0.74	2.63	0.82
2002-03 to 2004-05	46.02	40.10	1.18	0.75	2.25	0.71
2005-06 to 2007-08	41.47	41.20	2.01	1.51	2.41	1.51
2012-13 to 2014-15	13.93	29.64	9.94	2.70	3.23	1.62

Source: Calculated by the author from the Export Import Data Bank, Ministry of Commerce, Government of India

But over the last 2 decades, there has been addition of new destinations for carpets and other textile floor coverings exports. There has been a dramatic fall in the percentage of the carpets and other textile flooring exports to US and EU and the share has been scattered to many regions with Gulf countries' imports of carpets increasing at a very high pace. Also, it is clear that Latin America and Africa are the potential markets too (Table VII).

#### ARTICLES OF APPAREL AND CLOTHING ACCESSORIES

The apparel articles and clothing accessories, both knitted and not knitted together contribute the most to Indian t&c exports i.e. almost 40% to 45%. Most of the apparel exports have, as expected, gone to US and EU both knitted and not knitted. But for the non-knitted apparel articles and clothing accessories, the demand from US and EU is more as can be seen from Table 9.

**TABLE VIII: PERCENTAGE OF ARTICLES OF APPAREL AND CLOTHING ACCESSORIES; KNITTED OR CROCHETED EXPORTS TO DIFFERENT DESTINATIONS**

3 Year average	US	EU	Oceania	Africa	GCC	Latin America	North East Asia
1996-97 to 1998-99	27.52	45.07	1.46	0.77	6.39	0.88	1.77
2002-03 to 2004-05	20.18	45.62	0.68	1.15	11.23	0.87	0.59
2005-06 to 2007-08	29.40	51.11	0.36	1.00	7.39	0.43	0.63
2012-13 to 2014-15	22.41	43.36	0.77	3.96	15.97	3.01	1.38

Source: Calculated by the author from the Export Import Data Bank, Ministry of Commerce, Government of India

**TABLE IX: PERCENTAGE OF ARTICLES OF APPAREL AND CLOTHING ACCESSORIES; NOT KNITTED OR CROCHETED EXPORTS TO DIFFERENT DESTINATIONS**

3 Year average	US	EU	Africa	GCC	Latin America
1996-97 to 1998-99	35.50	36.92	2.74	8.57	2.05
2002-03 to 2004-05	34.90	35.49	2.26	12.44	1.14
2005-06 to 2007-08	32.97	42.69	2.13	10.19	1.30
2012-13 to 2014-15	22.81	39.16	4.66	16.44	3.16

Source: Calculated by the author from the Export Import Data Bank, Ministry of Commerce, Government of India

In case of knitted apparel articles, the share of exports to US and EU has though declined, but not a large extent and for Africa, Gulf countries and Latin America has increased dramatically indicating a positive way ahead for these articles (Table VIII).

Whereas, for non knitted apparel articles and clothing accessories, the percentage of exports to US have declined sharply over the years from 35.5% to 22.81% while for EU has increased. EU, being a large market has been a traditional export destination. On the other hand, Africa, GCC and Latin America in this aspect as well have shown a good jump indicating how export destinations have changed over time for this product as well (Table IX).

Overall, it can be interpreted that with the increasing dynamism in the world, especially, after the global economic crisis, the exports destination of Indian T&c products have changed and have changed for good.

## 5. CONCLUSION AND THE WAY AHEAD

India has now for long been taking policy reforms in order to improve efficiency and competitiveness. However India's share in the world textile and clothing exports has not risen significantly since 1996-97.

As far as share of different sectors within the textile and clothing industry exports are concerned, it has not changed very drastically, although the share of cotton in the exports basket has declined by almost 10% in the last 19 years and hence, there has been emergence of other sectors/products in the export basket such as man-made filaments, man-made staple fibers, special woven fabric, apparel articles etc., particularly because many products of Indian t&c industry have been included in the Focus Product Scheme (FPS) such as Articles of apparel and clothing accessories, which are made of leather or composition of leather, are included in the list of this scheme.

The impact of MFA phase out has been positive on almost all the sectors of textile industry barring very few, one of them being, silk (which showed a negative growth rate in the post MFA phase out period). But, even the positive impact was not of a great magnitude as was expected after the MFA phase out. In fact, as predicted by Verma (2002) in his study on Export Competitiveness of Indian Textile & Garment Industry that for the Indian apparel exports, Multi Fiber Arrangement (MFA) was indeed acting as a constraint, the MFA phase out should have benefitted the apparel exports. But the average annual growth rate that was registered by Apparel articles, both knitted and non knitted was 7.19% for the post MFA phase out period as compared to 7.11% in the pre MFA phase out period, which is almost an insignificant increase in the average annual growth rate.

Also, the Aggregate t&c exports showed only a small increase in the average annual growth rate from 5.77% in pre MFA phase out period to 9% in post MFA phase out period, although, in absolute terms, Indian t&c exports reached a US \$38000 million mark in 2014-15 from US \$14300 million mark.

But, one of the positive directions that India is going into is exploring the new destinations. The percentage of Indian t&c exports to Latin American and African Countries has been increasing in the last few years, as most of the countries of these continents are a part of Focus Market Scheme (FMS). Although many countries of these continents have a very low per capita income but they were not focused on, till now. The dependence on US and EU for the Indian T&c exports has declined in the recent years and particularly that is the reason, the global economic crisis did not impact the Indian t&c exports much.

With a number of exports promotion councils launched in the recent times, such as Apparel Export Promotion Council (AEPC), The Cotton Textiles Export Promotion Council (Texprocil), The Synthetic & Rayon Textiles Export Promotion Council (SRTEPC), Wool & Woollen Export Promotion Council (W&WEPC), Wool Industry Export Promotion Organization (WOOLTEXPRO), Indian Silk Export Promotion Council (ISEPC), Carpet Export Promotion Council (CEPC), Export Promotion Council for Handicrafts (EPCH), Power loom Development & Export Promotion Council (PDEXCIL), Handloom Export Promotion Council (HEPC), Jute Product Development Export Promotion Council (JPDEPC), working exclusively for the promotion of exports, Indian t&c industry enjoying a significant lead in terms labor cost per hour over developed countries like US and new industrialized economies like Hong Kong, Taiwan, South Korea and China, having raw material advantages, initiatives like 100% FDI in Indian textiles sectors under automatic route, Technology Upgradation Fund Scheme (TUF), Focus Market Scheme (FMS), Focus Product Scheme (FPS), Make in India and the new National Textile Policy, 2015 expecting to be in the picture soon, the future of the Indian textile and clothing industry looks promising, buoyed by both strong domestic consumption as well as export demand.

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