

## MARKET REPORT ON TEXTILE TRADE IN USA

With a population of 316 million people, USA is the single largest importer of Textile & Clothing (T&C) in the world. In the year 2019-20, USA imported US\$ 112 Billion worth of T & C products and also exported US\$ 26 Billion worth of T & C, which clearly indicates that T & C manufacturing continues to be an active sector. T&C manufacturing is an important component of the U.S. economy and are found in every region of the country.

### **Key facts about the T&C manufacturing sector in the USA:**

- ❖ Provides employment to over 585,000 workers.
- ❖ Excluding raw cotton and wool, two thirds of U.S. textile supply chain exports sent to free trade partners in 2019. The entire U.S. textile supply chain exported to more than 200 countries, with 24 countries importing \$100 million or more.
- ❖ The U.S. textile industry supplies more than 8,000 different textile products to the U.S. military, mostly made of synthetic textiles.
- ❖ Textile research and development is an important activity, with the U.S. textile complex developing next generation textile materials such as conductive fabric with anti-static properties, electronic textiles that can monitor heart rate and other vital signs, antimicrobial fibers, lifesaving body armour, and fabrics that adapt to the climate to make the wearer warmer or cooler.
- ❖ The U.S. textile industry invested over \$18 billion in new plants and equipment from 2009 to 2018, including recycling facilities to convert textile and other waste to new textile uses.
- ❖ U.S. textile mills have increased labor productivity by 69% since 2000.
- ❖ In 2019, hourly and nonsupervisory textile mill workers on an average earned more than twice as much as apparel store workers (\$722 per week vs. \$314) and received healthcare and retirement benefits.

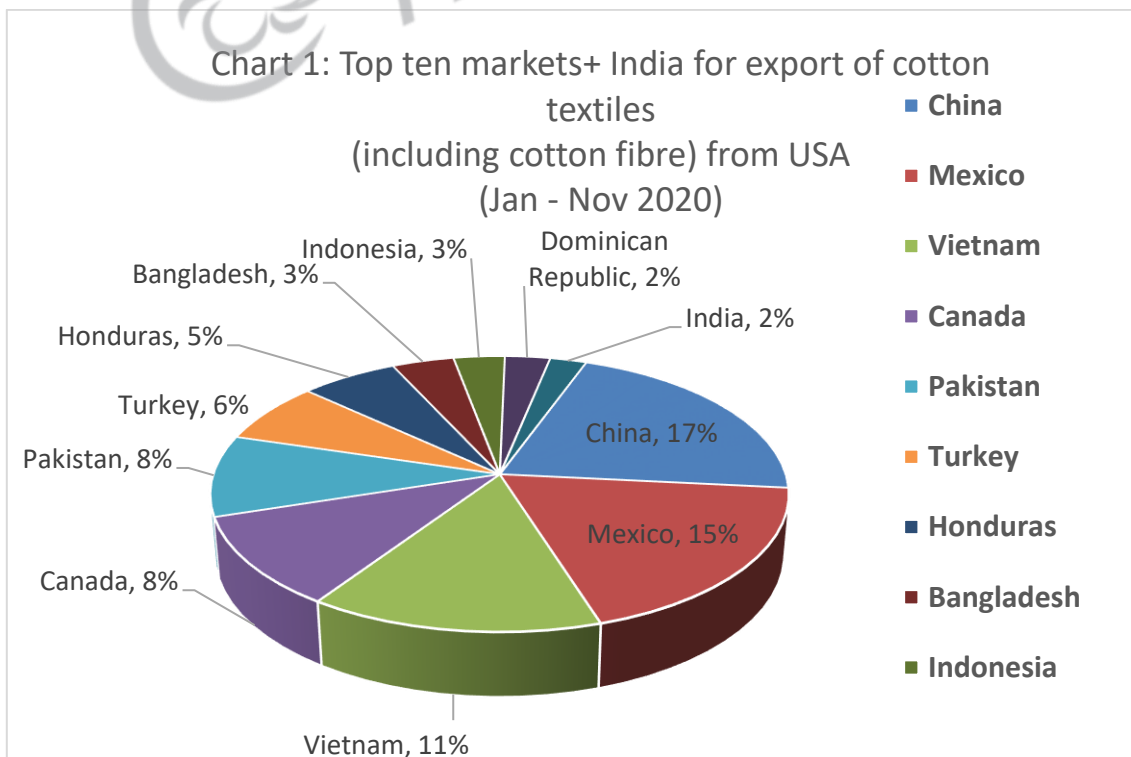
### **Export of T & C from USA**

For the period Jan-Nov 2020, USA exported US\$ 20.82 billion worth of T& C products, of which export of Textiles was valued at US\$ 17.11 billion. Of the total export of Textiles, cotton textile products (excluding raw cotton) was valued at US\$ 4.34 billion accounting for a share of 25%; share of cotton was 32% and the balance 43% is export of textiles made of synthetic, wool and other textile material.

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<b>Table 1: Export of T&amp;C from USA</b>		
<b>Value in Billion US\$</b>		
<b>Product group</b>	<b>2019 Jan-Dec</b>	<b>2020 Jan - Nov</b>
Export of T & C	26.13	20.82
Export of Clothing	5.21	3.71
Export of Textiles	20.92	17.11
<b>Export of Cotton Textiles (excluding raw cotton)</b>	<b>5.57</b>	<b>4.34</b>
Export of Cotton fibre	6.21	5.52
Export of Cotton Yarn	1.22	0.662
Export of Cotton Fabrics	2.19	1.56
Export of cotton Made-ups	2.16	2.12
Source : GTA		

Top 10 markets for export of Cotton Textiles (including cotton fibre) from USA is given at Chart 1. It may be noticed that Canada, Mexico, Honduras & Dominican Republic account for 30% of export of cotton textiles from the US. Export to China, Vietnam, Bangladesh, Pakistan, Turkey and India was mainly cotton fibre. China is the largest market for US cotton.



## MARKET REPORT ON TEXTILE TRADE IN USA

### Import of T&C into USA

For the period Jan-Nov 2020, USA imported US\$ 104.13 billion worth of T&C, of which import of Textiles was US\$ 40.57 billion and cotton textiles was valued at US\$ 26.66 billion.

India's share in supply of cotton textiles into the US was 9%, mostly home textiles.

In the year 2019, USA imported US\$ 11.83 billion worth of made-ups, whereas import for the period Jan-Nov 2020 recorded a steep increase to US\$ 24.26 billion, mainly because of huge increase in import of masks from China, which was exempted from additional tariff imposed by US on China.

India's share in made-up import into USA for the year 2019 was 21 %, however India's share has declined to 8.74 % for the period Jan-Nov 2020 due to sharp increase in total import from the base of US\$ 11.83 billion in the year 2019 to US\$ 24.26 billion in the first 11 months of the year 2020.

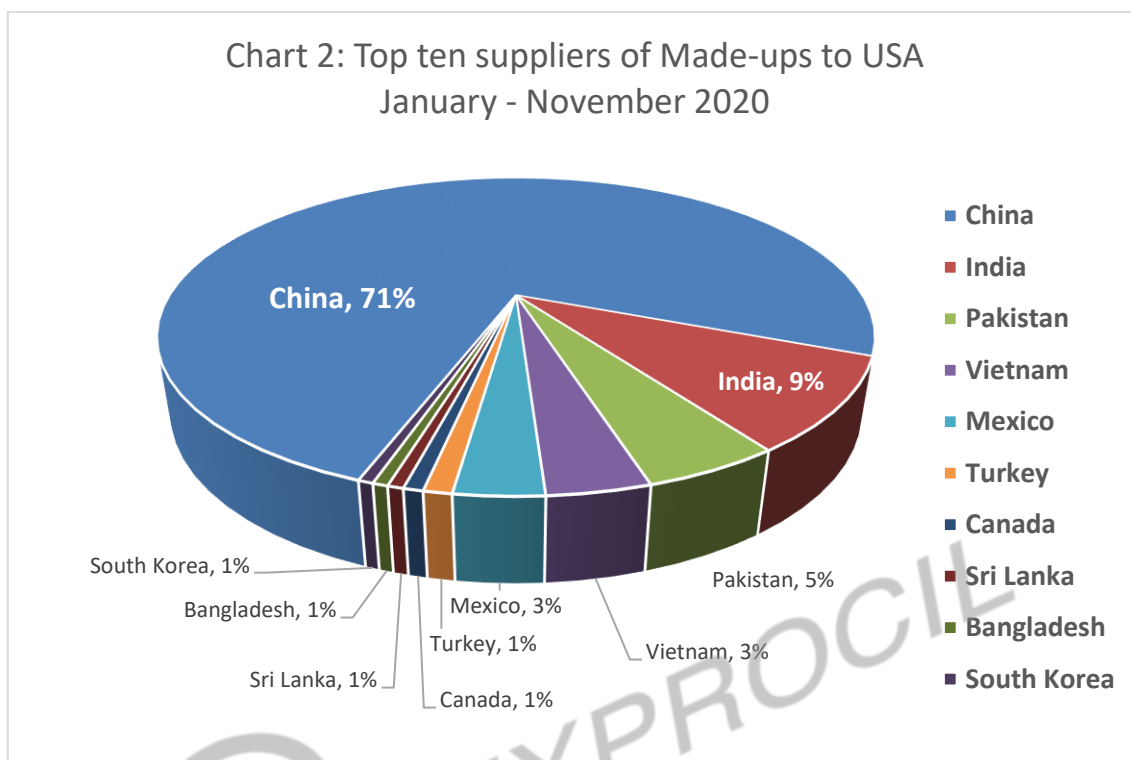
Product group	Total import into USA from all sources		Import into USA from India		% share Of India
	2019 Jan-Dec	2020 Jan -Nov	2019 Jan-Dec	2020 Jan-Nov	2020 Jan-Nov
Import of T & C	115.37	104.13	8.43	6.57	6.31
Import of Clothing	84.73	63.56	4.09	2.86	4.50
Import of Textiles	30.64	40.57	4.34	3.71	9.14
Import of Cotton Textiles	14.72	26.66	2.80	2.40	9.00
Import of Cotton Yarn	0.125	0.115	0.018	0.016	13.91
Import of Cotton Fabrics	2.764	2.287	0.26	0.264	11.54
Import of Cotton Made-ups	11.83	24.26	2.52	2.12	8.74

Source: GTA

Import from top ten supplying countries account for 96% of total import of made-ups into USA, as shown at Chart 2. China is the single largest supplier with 71 % market share. Sharp increase in import from China in the year 2020 over the previous year is mainly due to import of a large quantity of Covid19 related medical textiles including masks.

## MARKET REPORT ON TEXTILE TRADE IN USA

Chart 2: Top ten suppliers of Made-ups to USA  
January - November 2020



### Data Analysis:

Data analysis on import of cotton textile products into USA from all sources v/s from India is given in following Tables.

## MARKET REPORT ON TEXTILE TRADE IN USA

### Import of cotton yarn into USA

<b>Table 3: Import of Cotton yarn into USA from all sources</b>						
<b>HS Code / Product Description</b>		<b>Million US \$</b>				<b>% Change</b>
		<b>January - December</b>		<b>January - November</b>		
		<b>2018</b>	<b>2019</b>	<b>2019</b>	<b>2020</b>	
<b>TOTAL import of cotton yarn</b>		<b>148.30</b>	<b>125.28</b>	<b>115.54</b>	<b>115.17</b>	<b>-0.32</b>
520710	Cotton Yarn (Other Than Sewing Thread), Containing 85% Or More By Weight Of Cotton, Put Up For Retail Sale	38.87	37.25	33.41	38.11	14.05
520523	Cotton Yarn Nesoi, 85% Or More By Weight Of Cotton, Not Put Up For Retail Sale, Single Combed Yarn, Over 43 Nm But Not Over 52 Nm	25.27	18.11	16.87	15.66	-7.15
520512	Cotton Yarn Nesoi, 85% Or More By Weight Of Cotton, Not Put Up For Retail Sale, Single Uncombed Yarn, Over 14 Nm But Not Over 43 Nm	16.14	14.15	13.46	10.58	-21.42
520522	Cotton Yarn Nesoi, 85% Or More By Weight Of Cotton, Not Put Up For Retail Sale, Single Combed Yarn, Over 14 Nm But Not Over 43 Nm	13.80	9.37	8.64	9.95	15.11
520623	Cotton Yarn Nesoi, Less Than 85% By Weight Of Cotton, Not Put Up For Retail Sale, Single Combed Yarn, Over 43 Nm But Not Over 52 Nm	8.02	3.37	3.07	6.52	112.03
520790	Cotton Yarn (Other Than Sewing Thread), Containing Less Than 85% By Weight Of Cotton, Put Up For Retail Sale	4.25	4.70	3.74	5.40	44.54
520531	Cotton Yarn Nesoi, 85% Or More (Wt.) Cotton, Not For Retail Sale, Multiple Or Cabled Uncombed Yarn, Not Over 14 Nm Per Single Yarn	4.35	3.72	3.36	4.05	20.58
520524	Cotton Yarn Nesoi, 85% Or More By Weight Of Cotton, Not Put Up For Retail Sale, Single Combed Yarn, Over 52 Nm But Not Over 80 Nm	5.52	4.16	4.02	3.94	-2.16
520542	Cotton Yarn Nesoi, 85% Or More (Wt.) Cotton, Not For Retail Sale, Multiple Or Cabled Combed Yarn, Over 14 Nm But Not Over 43 Nm Per Single Yarn	4.56	4.65	4.55	3.33	-26.82
520532	Cotton Yarn Nesoi, 85% Or More (Wt.) Cotton, Not For Retail Sale, Multiple Or Cabled Uncombed Yarn, Over 14 Nm But Not Over 43 Nm Per Single Yarn	3.47	3.26	3.09	2.96	-4.20
<b>Total of Top 10 HS</b>		<b>124.23</b>	<b>102.74</b>	<b>94.22</b>	<b>100.50</b>	<b>-</b>
<b>% share of Top 10</b>		<b>84%</b>	<b>82%</b>	<b>82%</b>	<b>87%</b>	<b>-</b>

Numbering system conversion factor: Nm/1.69 = Ne

Source: GTA

## MARKET REPORT ON TEXTILE TRADE IN USA

Of the top 10 HS lines of cotton yarn imported into USA from all sources, India is also supplying 9 out of 10 HS lines, albeit in different proportion as shown at Table 3 & 4.

<b>Table 4: Import of Cotton Yarn into USA from India</b>						
HS Code/ Description		Million US \$				% Change 2020/19
		January - December		January - November		
		2018	2019	2019	2020	
	<b>TOTAL</b>	<b>24.51</b>	<b>17.67</b>	<b>16.80</b>	<b>16.39</b>	<b>-2.40</b>
520523	Cotton Yarn Nesoi, 85% Or More By Weight Of Cotton, Not Put Up For Retail Sale, Single Combed Yarn, Over 43 Nm But Not Over 52 Nm	2.10	1.76	1.62	3.02	86.04
520623	Cotton Yarn Nesoi, Less Than 85% By Weight Of Cotton, Not Put Up For Retail Sale, Single Combed Yarn, Over 43 Nm But Not Over 52 Nm	4.99	2.00	1.83	2.12	15.94
520522	Cotton Yarn Nesoi, 85% Or More By Weight Of Cotton, Not Put Up For Retail Sale, Single Combed Yarn, Over 14 Nm But Not Over 43 Nm	1.19	0.76	0.62	1.62	160.16
520710	Cotton Yarn (Other Than Sewing Thread), Containing 85% Or More By Weight Of Cotton, Put Up For Retail Sale	1.58	1.75	1.70	1.59	-6.09
520524	Cotton Yarn Nesoi, 85% Or More By Weight Of Cotton, Not Put Up For Retail Sale, Single Combed Yarn, Over 52 Nm But Not Over 80 Nm	2.32	1.67	1.62	1.51	-6.27
520513	Cotton Yarn Nesoi, 85% Or More By Weight Of Cotton, Not Put Up For Retail Sale, Single Uncombed Yarn, Over 43 Nm But Not Over 52 Nm	4.69	3.13	3.13	1.16	-62.98
520542	Cotton Yarn Nesoi, 85% Or More (Wt.) Cotton, Not For Retail Sale, Multiple Or Cabled Combed Yarn, Over 14 Nm But Not Over 43 Nm Per Single Yarn	0.85	1.13	1.11	1.14	2.69
520532	Cotton Yarn Nesoi, 85% Or More (Wt.) Cotton, Not For Retail Sale, Multiple Or Cabled Uncombed Yarn, Over 14 Nm But Not Over 43 Nm Per Single Yarn	1.35	0.99	0.94	1.09	15.30
520512	Cotton Yarn Nesoi, 85% Or More By Weight Of Cotton, Not Put Up For Retail Sale, Single Uncombed Yarn, Over 14 Nm But Not Over 43 Nm	1.64	0.97	0.97	1.02	5.00
520531	Cotton Yarn Nesoi, 85% Or More (Wt.) Cotton, Not For Retail Sale, Multiple Or Cabled Uncombed Yarn, Not Over 14 Nm Per Single Yarn	1.04	0.86	0.79	0.64	-19.00
<b>Total of top 10 HS</b>		<b>21.76</b>	<b>15.02</b>	<b>14.33</b>	<b>14.91</b>	
% share of top 10		89%	85%	85%	91%	

Numbering system conversion factor: Nm/1.69 = Ne

Source: GTA

## MARKET REPORT ON TEXTILE TRADE IN USA

### Import of Cotton Fabrics into USA from all sources Vs from India

<b>Table 5: Import of Cotton Fabrics into USA from all sources</b>						
<b>HS Code / Description</b>		<b>Million US \$</b>				<b>% Change 2020</b>
		<b>January - December</b>		<b>January - November</b>		
		<b>2018</b>	<b>2019</b>	<b>2019</b>	<b>2020</b>	
	<b>TOTAL</b>	<b>2950.43</b>	<b>2764.31</b>	<b>2552.88</b>	<b>2287.35</b>	<b>-10.40</b>
520852	Woven Fabrics Of Cotton, 85% Or More Cotton By Weight, Printed, Plain Weave, Weighing Over 100 G/M2 But Not Over 200 G/M2	260.57	271.02	250.54	325.97	30.11
590310	Textile Fabrics (Other Than Tire Cord) Impregnated, Coated, Covered Or Laminated With Polyvinyl Chloride	422.45	370.86	346.98	258.01	-25.64
590320	Textile Fabrics (Other Than Tire Cord) Impregnated, Coated, Covered Or Laminated With Polyurethane	351.46	341.77	316.95	247.81	-21.81
590390	Textile Fabrics (Other Than Tire Cord) Impregnated, Coated, Covered Or Laminated With Plastics, Nesoi	319.42	286.52	262.84	241.73	-8.03
590190	Tracing Cloth; Prepared Painting Canvas; Buckram And Similar Stiffened Textile Fabrics Of A Kind Used For Hat Foundations	112.58	102.70	93.45	127.18	36.10
580136	Woven Chenille Fabrics Nesoi, Of Manmade Fibers	100.09	103.82	93.41	106.08	13.57
600621	Knitted Or Crocheted Fabrics, Of Cotton, Unbleached Or Bleached, Nesoi	64.31	66.52	60.59	80.54	32.93
590700	Textile Fabrics Otherwise Impregnated, Coated Or Covered; Painted Canvas Being Theatrical Scenery, Studio Back-Cloths Or The Like	59.81	56.76	50.35	52.58	4.43
520832	Woven Fabrics Of Cotton, 85% Or More Cotton By Weight, Dyed, Plain Weave, Weighing Over 100 G/M2 But Not Over 200 G/M2	34.46	31.18	28.77	51.23	78.07
580610	Narrow Woven Fabrics, Not Over 30 Cm In Width, Of Pile (Including Terry) And Chenille Textile Materials	45.35	48.67	44.26	44.61	0.78
<b>Total of top 10</b>		<b>1770.49</b>	<b>1679.82</b>	<b>1548.14</b>	<b>1535.73</b>	
<b>% share of top 10</b>		<b>60.01</b>	<b>60.77</b>	<b>60.64</b>	<b>67.14</b>	

Source : GTA

## MARKET REPORT ON TEXTILE TRADE IN USA

**Top 10 HS lines of cotton fabrics imported into USA Vs from India is given at Table 5 & 6. It may be observed that:**

- Of the top 10 HS lines of cotton fabrics imported into USA from all sources, India is present in only 5 HS lines.
- Import under top 3 HS lines of cotton fabrics imported into USA account for US\$ 831.79 million in which share of India is nil.
- There is a vast scope to increase export of coated, impregnated fabrics from India to USA.
- There is a mismatch in what the market need and what is exported from India. There may be various reasons including production capability, availability of technology etc. which need to be addressed.

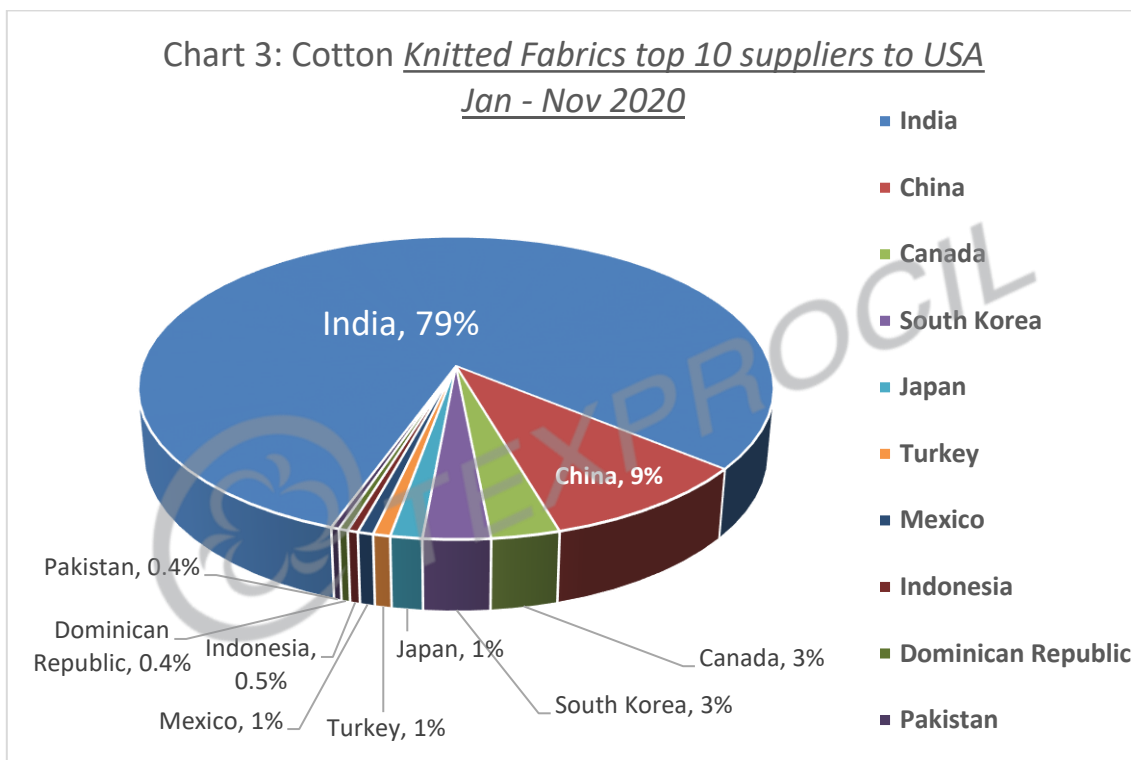
**Table 6: Import of Cotton Fabrics into USA from India**

HS Code / Description		Million US \$				% Change 2020
		January - December		January - November		
		2018	2019	2019	2020	
	<b>TOTAL</b>	<b>259.01</b>	<b>271.19</b>	<b>249.87</b>	<b>263.91</b>	<b>5.62</b>
590390	Textile Fabrics (Other Than Tire Cord) Impregnated, Coated, Covered Or Laminated With Plastics, Nesoi	70.90	79.59	73.16	78.45	7.23
600621	Knitted Or Crocheted Fabrics, Of Cotton, Unbleached Or Bleached, Nesoi	58.04	55.83	50.61	73.17	44.60
590190	Tracing Cloth; Prepared Painting Canvas; Buckram And Similar Stiffened Textile Fabrics Of A Kind Used For Hat Foundations	13.02	11.87	10.96	13.66	24.61
600121	Looped Pile Fabrics, Knitted Or Crocheted, Of Cotton	0.04	3.25	2.45	9.56	290.88
520812	Woven Fabrics Of Cotton, 85% Or More Cotton By Weight, Unbleached, Plain Weave, Weighing Over 100 G/M2 But Not Over 200 G/M2	5.24	5.44	5.14	6.85	33.27
520911	Woven Fabrics Of Cotton, 85% Or More Cotton By Weight, Unbleached, Plain Weave, Weighing Over 200 G/M2	7.70	7.91	7.34	6.56	-10.65
590700	Textile Fabrics Otherwise Impregnated, Coated Or Covered; Painted Canvas Being Theatrical Scenery, Studio Back-Cloths Or The Like	1.74	4.56	4.05	5.59	38.24
580136	Woven Chenille Fabrics Nesoi, Of Manmade Fibers	7.46	7.45	6.74	5.43	-19.49
590310	Textile Fabrics (Other Than Tire Cord) Impregnated, Coated, Covered Or Laminated With Polyvinyl Chloride	12.73	11.18	10.58	5.13	-51.50
520811	Woven Fabrics Of Cotton, 85% Or More Cotton By Weight, Unbleached, Plain Weave, Weighing Not Over 100 G/M2	4.01	5.18	4.88	4.83	-1.07
<b>Total of Top 10</b>		<b>180.89</b>	<b>192.25</b>	<b>175.89</b>	<b>209.23</b>	
% share of top 10		69.84	70.89	70.40	79.28	

Source : GTA

***Import of Knitted Fabrics into USA***

For the period Jan-November 2020, USA imported US\$ 96 million worth of cotton knitted fabrics, of which import from India was valued at US\$ 76 million India is the largest supplier of cotton knitted fabrics to USA with a market share of 79%.



## MARKET REPORT ON TEXTILE TRADE IN USA

### Import of Cotton Made-ups into USA from all sources Vs from India

<b>Table 7: Import of Cotton made-ups into USA from all sources</b>						
<b>HS Code / Description</b>		<b>Million US \$</b>				<b>% Change</b>
		<b>January - December</b>		<b>January - November</b>		<b>% Δ 2020</b>
		<b>2018</b>	<b>2019</b>	<b>2019</b>	<b>2020</b>	
	<b>TOTAL</b>	<b>11,722.29</b>	<b>11,822.41</b>	<b>10,976.26</b>	<b>24,245.79</b>	<b>120.89</b>
630790	Made-Up Textile Articles, Nesoi	4,072.09	4,428.26	4,110.28	18,157.56	341.76
630260	Toilet And Kitchen Linen Of Cotton Terry Toweling Or Similar Cotton Terry Fabrics	2,002.82	1,958.16	1,818.85	1,585.32	-12.84
630231	Bed Linen (Other Than Printed) Of Cotton, Not Knitted Or Crocheted	1,555.98	1,513.81	1,414.89	1,147.55	-18.89
630710	Floorcloths, Dishcloths, Dusters And Similar Cleaning Cloths	616.72	600.63	549.05	551.23	0.40
630221	Bed Linen, Printed, Of Cotton, Not Knitted Or Crocheted	479.09	467.61	435.93	376.68	-13.59
630210	Bed Linen, Knitted Or Crocheted	318.64	343.35	320.15	290.79	-9.17
570500	Carpets And Other Textile Floor Coverings (Whether Or Not Made-Up), Nesoi	282.36	247.85	228.40	215.49	-5.65
630492	Furnishing Articles Nesoi, Of Cotton, Not Knitted Or Crocheted	208.72	197.57	184.33	152.53	-17.25
630130	Blankets (Other Than Electric Blankets) And Traveling Rugs, Of Cotton	189.88	203.92	189.48	139.76	-26.24
630251	Table Linen Of Cotton, Not Knitted Or Crocheted	168.47	156.98	144.10	122.99	-14.65
<b>Total of Top 10 HS lines</b>		<b>9,894.77</b>	<b>10,118.14</b>	<b>9,395.46</b>	<b>22,739.89</b>	
% share of Top 10		84.41	85.58	85.60	93.79	

Source: GTA

## MARKET REPORT ON TEXTILE TRADE IN USA

**Import of Cotton Made-ups into USA from all sources & India are given at Table 7 & 8. It may be observed that:**

- Of the top 10 HS lines of cotton made-ups imported into USA, India is also in the top 8 HS lines thereby indicating India is also supplying almost all the major products that are in demand in the US market.
- India is the top supplier of bed linen products to USA.
- There is a scope for increasing export of cleaning cloths such as dishcloth, floor-cloths in addition to knitted bedlinen.

<b>Table 8 : Import of Cotton Made-ups into USA from India</b>						
<b>HS Code / Description</b>		<b>Million US \$</b>				<b>% Change 2020</b>
		<b>January - December</b>		<b>January - November</b>		
		<b>2018</b>	<b>2019</b>	<b>2019</b>	<b>2020</b>	
<b>TOTAL import of cotton made-ups</b>		<b>2,478.49</b>	<b>2,507.81</b>	<b>2,327.30</b>	<b>2,114.47</b>	<b>-9.14</b>
630260	Toilet And Kitchen Linen Of Cotton Terry Toweling Or Similar Cotton Terry Fabrics	730.90	729.83	676.34	629.13	-6.98
630231	Bed Linen (Other Than Printed) Of Cotton, Not Knitted Or Crocheted	788.57	779.10	732.85	617.68	-15.72
630221	Bed Linen, Printed, Of Cotton, Not Knitted Or Crocheted	142.76	150.69	138.65	112.06	-19.18
630790	Made-Up Textile Articles, Nesoi	87.33	97.50	88.75	98.92	11.46
570500	Carpets And Other Textile Floor Coverings (Whether Or Not Made-Up), Nesoi	76.48	83.13	77.13	89.45	15.97
630251	Table Linen Of Cotton, Not Knitted Or Crocheted	106.81	103.98	95.80	82.84	-13.52
630492	Furnishing Articles Nesoi, Of Cotton, Not Knitted Or Crocheted	70.31	72.80	67.22	61.60	-8.36
630130	Blankets (Other Than Electric Blankets) And Traveling Rugs, Of Cotton	87.46	80.49	75.35	56.71	-24.74
630391	Curtains (Including Drapes), Interior Blinds And Curtain Or Bed Valances Of Cotton, Not Knitted Or Crocheted	46.04	46.48	42.77	41.27	-3.51
630291	Toilet And Kitchen Linen Of Cotton, Other Than Of Terry Fabrics	50.48	51.37	48.04	38.93	-18.98
<b>Total of top 10</b>		<b>2,187.14</b>	<b>2,195.38</b>	<b>2,042.90</b>	<b>1,828.59</b>	
<b>% share of top 10</b>		<b>88%</b>	<b>88%</b>	<b>88%</b>	<b>86%</b>	

Source : GTA

### **Way forward to increase export of cotton textiles from India to USA**

As shown in above Tables, there is need for product diversification to supply what is required in the market thereby bridging the mismatch in export from India Vs import into USA from all sources.

Yarns for retail sale, covered under HS 5207 has a scope for increasing export from India to USA.

Coated fabrics for various end uses, such as abrasive fabrics, tents, industrial filters have high potential for export from India.

USA imports over half a billion US\$ worth of floor-cloths and such made-ups for cleaning purpose, which offers a vast scope for increasing export from India.

Knitted bedlinen is over US\$ 300 million business in USA offering scope for increasing export from India.

It is important to diversify into Fibre mix and product mix to meet with market demand and compete with other major supplying countries.

**Kindly send your feedback and comments to: [ravi@texprocil.org](mailto:ravi@texprocil.org)**

**Source: NCTO, USA; GTA, Singapore; EoI, Washington.**

**Disclaimer: Kindly verify credibility of buyers in the importers database at your own interest. The Council is not responsible for recent developments in their existence and credibility.**