



# Brazil Textiles Market Study

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# Market Study Content

- Textiles Market Overview in Brazil
- Main Demanded Products in the Brazilian Exports and Imports
- Qualitative Survey with 70 Brazilian Companies
- Most important textiles trade shows in Brazil
- Regulatory and quality demands to export to Brazil
- Textile Imports from India 2019 (Appendix-I)



# Textiles Market Overview in Brazil

- ✓ The Brazilian industry, generically speaking, is suffering great difficulties to compete in this increasingly globalized market. Issues such as the Brazilian currency floating, high burden taxes, the bureaucracy system, obsolete and deficient infrastructure, make it difficult for Brazilian products to compete in the international market.
- ✓ In addition to external obstacles, smuggling and overpricing that threaten the Organization's rules World Trade Organization (WTO), the textile industry takes the high production costs, practiced today in Brazil. A new threat weighs on the textile sector: the United States natural gas production at 20% less of the price offered in the Brazil, which they are obtaining there through a revolutionary process of hydraulic fracking and chemical of the shale gas.
- ✓ All these obstacles demand an increasingly intense union structured to struggle, in defense of the textile sector, which employs about 1.5 million Brazilians, and it is very relevant for the country's development.



*Senator of the Republic Luiz Henrique da Silveira (PMDB-SC)*

*Leader of the Parliamentary Textile Front in the Senate*



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# Textiles Market Overview in Brazil

The Textile / Garments Sector has growth 11% from 2017 to 2018, although the Brazilian GDP suffered a 12% reduction in the same period.



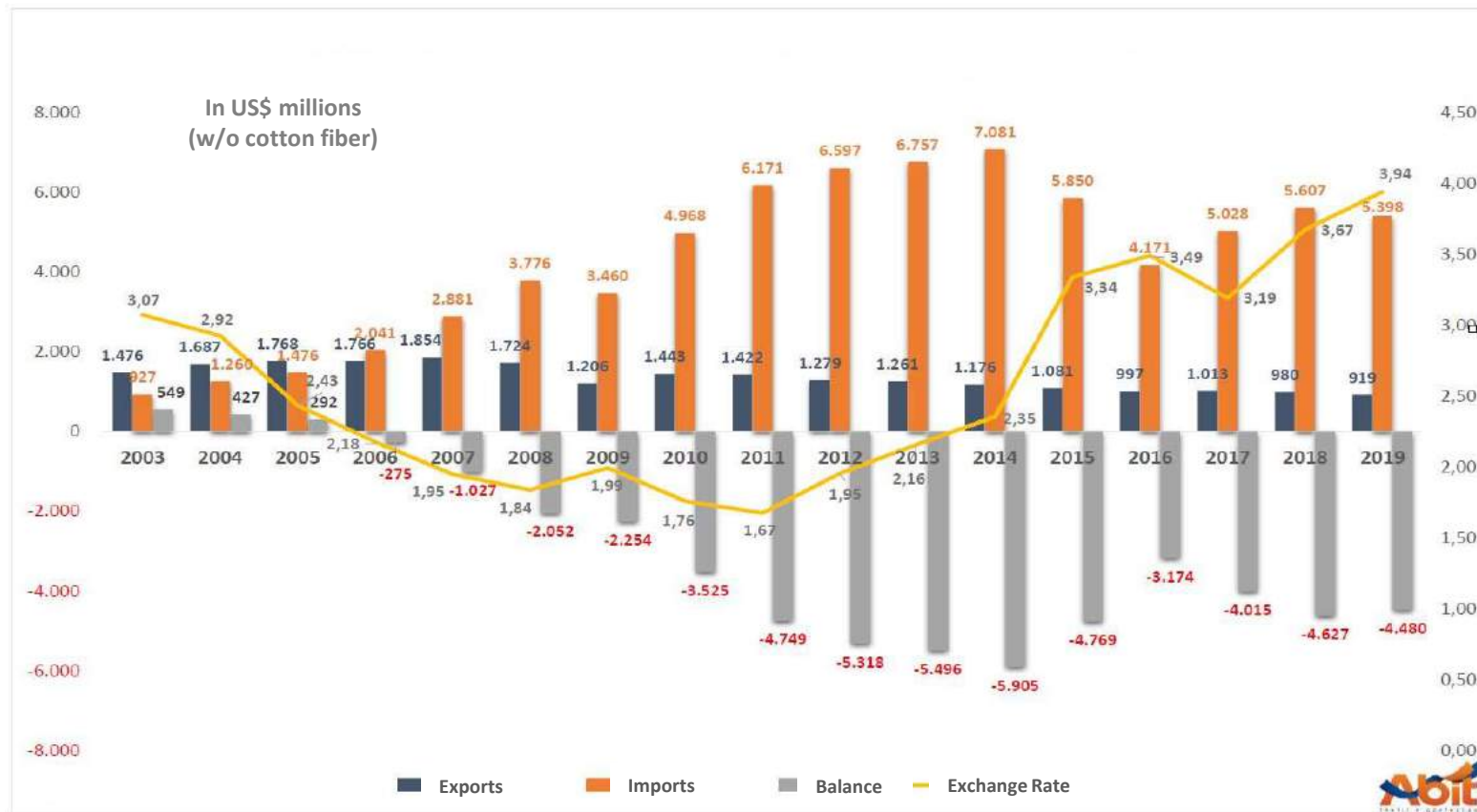
Source: Abit



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# Trade Balance – Textiles Sector

The Trade Balance of the Textile Sector has historically operated with deficit for Brazil.



Source: Abit



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# Brazilian Exports of Textile and Manufactured Products by Country

*Note: without cotton fiber*

	JAN - DEC/2018		JAN - DEC/2019		Variation (%)		
	Country	US\$ FOB	Kg (Net)	US\$ FOB	JAN - DEC/2019 JAN - DEC/2018		
					US\$ FOB	Kg (Net)	
1	<b>Argentina</b>	215.538.821	39.543.389	204.596.944	39.646.227	-5,08	0,26
2	<b>Paraguay</b>	106.650.283	13.110.277	100.585.835	12.763.160	-5,69	-2,65
3	<b>U.S.A</b>	85.170.769	19.539.524	84.496.175	20.524.816	-0,79	5,04
4	<b>Uruguay</b>	82.694.629	12.148.779	76.244.879	12.250.608	-7,80	0,84
5	<b>Netherlands</b>	51.971.991	7.896.846	16.701.268	2.424.416	-67,86	-69,30
6	<b>Colombia</b>	43.670.168	8.039.997	55.505.311	10.900.442	27,10	35,58
7	<b>Chile</b>	37.394.176	5.659.913	37.516.146	4.880.858	0,33	-13,76
8	<b>Peru</b>	37.262.538	6.105.072	36.500.979	6.324.647	-2,04	3,60
9	<b>Mexico</b>	35.144.749	6.327.857	36.071.275	6.461.834	2,64	2,12
10	<b>Bolivia</b>	34.431.655	5.782.779	26.087.509	3.463.445	-24,23	-40,11
11	<b>China</b>	31.379.338	18.052.300	38.411.058	24.403.027	22,41	35,18
12	<b>Ecuador</b>	25.169.718	3.621.052	24.363.619	3.673.799	-3,20	1,46
13	<b>Japan</b>	13.388.610	215.003	11.497.735	274.793	-14,12	27,81
14	<b>Belgium</b>	12.404.233	1.972.775	6.335.973	1.009.583	-48,92	-48,82
15	<b>Costa Rica</b>	12.390.737	3.520.403	11.695.325	3.072.352	-5,61	-12,73
16	<b>Portugal</b>	11.887.913	4.694.845	11.011.058	4.905.974	-7,38	4,50
17	<b>France</b>	11.869.088	295.064	12.096.447	790.538	1,92	167,92
18	<b>Vietnam</b>	11.752.433	450.949	9.518.359	460.560	-19,01	2,13
19	<b>Italy</b>	7.783.947	441.826	7.239.119	543.675	-7,00	23,05
20	<b>Dominican Republic</b>	6.482.677	779.407	4.919.501	516.487	-24,11	-33,73
	<b>Others</b>	105.894.282	23.337.301	107.283.388	24.844.365	39.949	414.731
	<b>Grand total</b>	<b>980.332.755</b>	<b>181.535.358</b>	<b>918.677.919</b>	<b>184.135.608</b>	<b>-6,29</b>	<b>1,43</b>

Source: MDIC – Ministério da Indústria, Comércio Exterior e Serviços



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# Brazilian Exports of Textile and Manufactured Products by Products

	JAN - DEC/2018			JAN - DEC/2019			Variation (%)		
	1000 FOB	Ton	US\$/Kg	1000 FOB	Ton	US\$/Kg	JAN - DEC/2019		
							1000 FOB	Ton	US\$/Kg
<b>Grand total</b>	<b>2.669.587</b>	<b>1.159.477</b>	<b>2,30</b>	<b>3.558.160</b>	<b>1.796.107</b>	<b>1,98</b>	<b>33,29</b>	<b>54,91</b>	<b>-13,96</b>
<b>Grand Total (Without Cotton Fiber)</b>	<b>980.333</b>	<b>181.535</b>	<b>5,40</b>	<b>918.678</b>	<b>184.136</b>	<b>4,99</b>	<b>-6,29</b>	<b>1,43</b>	<b>-7,61</b>

<b>1. Textile fibers</b>	<b>1.836.472</b>	<b>1.030.812</b>	<b>1,78</b>	<b>2.752.449</b>	<b>1.666.382</b>	<b>1,65</b>	<b>49,88</b>	<b>61,66</b>	<b>-7,29</b>
1.01. Polyamide	990	84	11,78	575	48	12,09	-41,89	-43,35	2,58
1.02. Polyester	51.572	10.534	4,90	17.469	5.063	3,45	-66,13	-51,94	-29,52
1.03. Acrylic	0	0	4,38	1	0	56,22	1.345,71	12,50	1.185,08
1.04. Viscose	3	1	5,11	0	0	3,00	-99,89	-99,82	-41,26
1.05. Acetate Cables	20.824	4.435	4,70	21.620	4.945	4,37	3,82	11,50	-6,89
1.06. Wool / Fur / Tops	31.699	7.801	4,06	27.561	8.105	3,40	-13,05	3,89	-16,31
1.07. Linen	36	11	3,24	15	11	1,41	-57,63	-2,51	-56,54
1.09. Cotton	1.689.254	977.941	1,73	2.639.482	1.611.971	1,64	56,25	64,83	-5,21
1.12. Silk	1.088	101	10,80	1.053	128	8,22	-3,18	27,25	-23,91
1.13. Other natural	40.071	29.623	1,35	43.659	35.853	1,22	8,95	21,03	-9,98
1.14. Other artificial / synthetic	935	281	3,32	1.014	259	3,92	8,47	-7,94	17,83
<b>2. Yarns</b>	<b>64.691</b>	<b>9.663</b>	<b>6,69</b>	<b>67.365</b>	<b>13.155</b>	<b>5,12</b>	<b>4,13</b>	<b>36,13</b>	<b>-23,50</b>
2.1. Silk	32.645	453	72,13	27.637	428	64,51	-15,34	-5,34	-10,56
2.2. Wool / Fur	77	6	12,14	209	18	11,38	171,63	189,71	-6,24
2.3. Cotton	14.960	3.847	3,89	23.885	6.659	3,59	59,66	73,11	-7,77
2.4. Linen	0	0	0,00	4	0	39,32	0,00	0,00	0,00
2.5. Ramie	10.624	4.132	2,57	10.395	4.984	2,09	-2,16	20,62	-18,89
2.6. Artificial and Synthetic	6.294	1.211	5,20	5.186	1.057	4,91	-17,60	-12,79	-5,52
2.7. Jute	90	14	6,39	50	8	6,22	-45,03	-43,47	-2,77
2.8. Others	1	0	5,86	0	0	0,00	0,00	0,00	0,00

Source: MDIC – Ministério da Indústria, Comércio Exterior e Serviços



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# Brazilian Exports of Textile and Manufactured Products by Products

	JAN - DEC/2018			JAN - DEC/2019			Variation (%)		
	JAN - DEC/2019			JAN - DEC/2019			JAN - DEC/2019		
	1000 FOB	Ton	US\$/Kg	1000 FOB	Ton	US\$/Kg	1000 FOB	Ton	US\$/Kg
<b>3. Filaments</b>	<b>58.805</b>	<b>10.003</b>	<b>5,88</b>	<b>58.095</b>	<b>10.268</b>	<b>5,66</b>	<b>-1,21</b>	<b>2,65</b>	<b>-3,76</b>
3.1. Polyamide	7.296	1.209	6,03	10.570	1.827	5,79	44,88	51,08	-4,11
3.2. Polyester	4.486	1.534	2,92	5.193	1.726	3,01	15,76	12,50	2,89
3.2.1. POY polyester	24	8	2,99	8	4	1,92	-66,83	-48,18	-36,00
3.2.2. Industrial Polyester	1.028	467	2,20	435	114	3,83	-57,67	-75,71	74,24
3.2.3. Other Polyesters	3.434	1.058	3,24	4.750	1.608	2,95	38,33	51,93	-8,95
3.3. Viscose	1	0	106,79	2	0	306,00	43,28	-50,00	186,56
3.5. Spandex	40.741	6.578	6,19	35.956	6.067	5,93	-11,74	-7,78	-4,30
3.6. Others	6.281	682	9,21	6.374	649	9,81	1,48	-4,80	6,60
<b>4. Fabrics</b>	<b>217.642</b>	<b>31.313</b>	<b>6,95</b>	<b>208.865</b>	<b>32.404</b>	<b>6,45</b>	<b>-4,03</b>	<b>3,49</b>	<b>-7,27</b>
4.1. Silk	10	0	67,65	30	0	215,29	187,43	-9,68	218,23
4.2. Wool / Fur	1.248	54	23,13	1.054	56	18,98	-15,52	2,97	-17,96
4.3. Cotton	127.298	19.149	6,65	116.919	19.338	6,05	-8,15	0,99	-9,05
4.4. Linen	1.383	78	17,69	1.254	66	19,07	-9,29	-15,87	7,82
4.5. Ramie	32	4	8,37	21	4	5,79	-34,56	-5,39	-30,83
4.6. Jute	15	2	6,05	25	5	5,23	65,77	91,87	-13,61
4.7. Filaments	27.153	5.527	4,91	24.974	5.308	4,71	-8,02	-3,97	-4,22
4.7.1. Synthetic Filaments	27.044	5.525	4,90	24.864	5.305	4,69	-8,06	-3,98	-4,25
4.7.2. Artificial Filaments	108	2	44,00	110	3	39,47	1,68	13,36	-10,30
4.8. Discontinuous Fibers	9.576	1.108	8,64	7.968	1.031	7,73	-16,79	-6,96	-10,57
4.8.1. Synthetic	6.763	883	7,66	5.719	829	6,90	-15,43	-6,09	-9,95
4.8.2. Artificial	2.813	225	12,52	2.249	201	11,17	-20,05	-10,37	-10,80
4.9. Mesh	50.928	5.391	9,45	56.620	6.598	8,58	11,18	22,40	-9,17
4.9.1 Cotton	12.214	1.575	7,76	15.409	2.160	7,13	26,16	37,21	-8,06
4.9.2. Artificial and Synthetic	33.992	3.278	10,37	36.412	3.905	9,32	7,12	19,13	-10,08
4.9.3. Others	4.722	538	8,78	4.799	532	9,02	1,63	-1,04	2,70

Source: MDIC – Ministério da Indústria, Comércio Exterior e Serviços



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# Brazilian Exports of Textile and Manufactured Products by Products

	JAN - DEC/2018			JAN - DEC/2019			Variation (%)		
	1000 FOB	Ton	US\$/Kg	1000 FOB	Ton	US\$/Kg	1000 FOB	Ton	US\$/Kg
<b>5. Sewing Threads</b>	<b>9.848</b>	<b>784</b>	<b>12,56</b>	<b>9.940</b>	<b>925</b>	<b>10,75</b>	<b>0,94</b>	<b>17,91</b>	<b>-14,39</b>
5.1. Cotton	1.080	26	41,63	903	31	29,55	-16,33	17,86	-29,01
5.2. Synthetic Filaments	7.392	641	11,54	7.405	717	10,32	0,16	12,01	-10,58
5.3. Artificial Filaments	1	0	29,61	22	1	22,92	2.166,22	2.827,27	-22,58
5.5. Discontinuous Synthetic Fibers	1.375	118	11,69	1.610	176	9,17	17,10	49,26	-21,54
<b>6. Clothing</b>	<b>193.989</b>	<b>11.295</b>	<b>17,17</b>	<b>201.509</b>	<b>11.903</b>	<b>16,93</b>	<b>3,88</b>	<b>5,39</b>	<b>-1,43</b>
6.1. Clothing	138.369	3.674	37,66	150.325	4.462	33,69	8,64	21,46	-10,56
6.1.1. Mail Garments	85.430	2.484	34,39	92.882	2.915	31,86	8,72	17,36	-7,36
6.1.1.1. Cotton	37.237	1.357	27,44	37.259	1.507	24,72	0,06	11,10	-9,94
6.1.1.2. Artificial and Synthetic	39.155	828	47,32	42.777	1.008	42,44	9,25	21,80	-10,30
6.1.1.3. Others	9.038	300	30,17	12.845	400	32,13	42,12	33,46	6,48
6.1.2. Flat Cloth Garments	52.939	1.190	44,49	57.444	1.547	37,13	8,51	30,02	-16,55
6.1.2.1. Cotton	17.978	519	34,65	18.631	610	30,56	3,63	17,50	-11,80
6.1.2.2. Artificial and Synthetic	14.059	254	55,25	16.254	377	43,15	15,61	48,03	-21,90
6.1.2.3. Others	20.902	416	50,19	22.559	561	40,24	7,93	34,62	-19,83
6.2. Bed, bath and table linen	35.107	3.861	9,09	30.391	3.541	8,58	-13,43	-8,29	-5,61
6.2.1 Cotton	30.860	3.370	9,16	27.751	3.196	8,68	-10,08	-5,16	-5,18
6.2.2. Artificial and Synthetic	2.977	376	7,91	1.772	267	6,64	-40,46	-29,08	-16,05
6.2.3. Others	1.271	114	11,15	868	77	11,24	-31,67	-32,19	0,78
6.3. Curtains	1.057	40	26,59	897	50	18,12	-15,12	24,57	-31,86
6.3.1 Cotton	179	21	8,43	113	14	8,10	-36,83	-34,26	-3,92
6.3.2. Artificial and Synthetic	633	16	39,59	478	33	14,64	-24,48	104,28	-63,03
6.3.3. Others	244	2	98,94	306	3	107,49	25,11	15,15	8,65
6.4. Other Made Items	19.455	3.721	5,23	19.895	3.851	5,17	2,26	3,50	-1,19
6.4.1. Cotton	453	64	7,10	610	83	7,36	34,75	29,98	3,67
6.4.2. Artificial and Synthetic	1.189	134	8,86	259	46	5,65	-78,25	-65,90	-36,22
6.4.3. Others	17.813	3.523	5,06	19.026	3.723	5,11	6,81	5,66	1,09

Source: MDIC – Ministério da Indústria, Comércio Exterior e Serviços



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# Brazilian Exports of Textile and Manufactured Products by Products

	JAN - DEC/2018			JAN - DEC/2019			Variation (%)		
							JAN - DEC/2019		
	1000 FOB	Ton	US\$/Kg	1000 FOB	Ton	US\$/Kg	1000 FOB	Ton	US\$/Kg
<b>7. Other manufactures</b>	<b>288.141</b>	<b>65.606</b>	<b>4,39</b>	<b>259.937</b>	<b>61.070</b>	<b>4,26</b>	<b>-9,79</b>	<b>-6,91</b>	<b>-3,09</b>
7.1. Pastes, felts, nonwovens,	153.054	49.287	3,11	139.334	47.739	2,92	-8,96	-3,14	-6,01
7.1.1. Cotton	4.440	390	11,40	3.277	298	10,99	-26,18	-23,41	-3,62
7.1.2. Artificial and Synthetic	84.648	25.739	3,29	82.423	25.297	3,26	-2,63	-1,72	-0,93
7.1.3. Others	63.966	23.159	2,76	53.635	22.144	2,42	-16,15	-4,39	-12,31
7.2. Rugs and Carpets	13.352	2.977	4,48	12.320	2.644	4,66	-7,73	-11,20	3,90
7.2.2. Artificial / Synthetic	3.488	790	4,42	3.953	941	4,20	13,34	19,17	-4,89
7.2.3. Others	9.865	2.187	4,51	8.367	1.703	4,91	-15,18	-22,16	8,97
7.3. Special fabrics, lace, embroidery	42.393	6.554	6,47	33.898	5.433	6,24	-20,04	-17,10	-3,55
7.3.1. Cotton	2.435	275	8,85	2.162	269	8,03	-11,19	-2,19	-9,20
7.3.2. Artificial and Synthetic	32.364	5.653	5,73	25.407	4.559	5,57	-21,50	-19,35	-2,67
7.3.3. Others	7.594	626	12,13	6.330	605	10,46	-16,65	-3,33	-13,78
7.4. Impregnated fabrics, technical use	79.341	6.787	11,69	74.384	5.254	14,16	-6,25	-22,59	21,11
7.4.2. Artificial and Synthetic	6.387	1.255	5,09	8.738	1.583	5,52	36,82	26,17	8,44
7.4.3. Others	72.955	5.532	13,19	65.646	3.671	17,88	-10,02	-33,65	35,62

Source: MDIC – Ministério da Indústria, Comércio Exterior e Serviços



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# Brazilian Imports of Textile and Manufactured Products by Country

	JAN - DEC/2018		JAN - DEC/2019		Variation (%)		
	Country	US\$ FOB	Kg (Net)	US\$ FOB	Kg (Net)	JAN - DEC/2019 JAN - DEC/2018	
						US\$ FOB	Kg (Net)
1	China	2.917.719.403	690.466.055	2.955.080.876	789.245.872	1,28	14,31
2	India	501.206.683	244.821.549	376.162.690	191.862.759	-24,95	-21,63
3	Indonesia	249.652.895	99.731.733	221.508.052	98.392.404	-11,27	-1,34
4	Vietnam	165.808.197	39.708.615	196.007.360	58.739.493	18,21	47,93
5	Paraguay	157.187.663	34.012.502	176.825.038	38.719.560	12,49	13,84
6	Bangladesh	201.854.249	20.670.401	173.248.983	21.666.019	-14,17	4,82
7	U.S	149.969.306	18.640.440	126.835.122	14.547.223	-15,43	-21,96
8	Taiwan	102.410.678	34.250.095	93.695.940	31.954.384	-8,51	-6,70
9	Argentina	89.167.635	27.219.265	89.177.213	24.154.281	0,01	-11,26
10	Turkey	91.768.570	15.948.624	88.269.331	13.943.881	-3,81	-12,57
11	South Korea	91.216.652	33.556.397	83.034.518	32.215.319	-8,97	-4,00
12	Peru	68.471.576	5.027.226	64.410.429	4.269.536	-5,93	-15,07
13	Israel	46.886.319	13.584.898	59.223.125	16.623.204	26,31	22,37
14	Italy	52.193.491	3.178.902	55.592.714	3.091.412	6,51	-2,75
15	Germany	56.823.888	7.503.966	52.129.824	6.693.671	-8,26	-10,80
16	Thailand	62.935.809	25.940.811	51.897.417	19.124.184	-17,54	-26,28
17	Colombia	45.167.733	11.417.882	49.912.171	10.990.857	10,50	-3,74
18	Pakistan	36.354.249	3.872.598	43.214.625	4.283.133	18,87	10,60
19	Cambodia	27.263.046	1.051.471	33.374.480	1.262.691	22,42	20,09
20	Mexico	36.231.090	6.317.026	33.125.522	5.489.529	-8,57	-13,10
	Others	456.583.916	67.371.386	373.917.852	52.335.408	7.894	12.289
	<b>Grand Total</b>	<b>5.606.873.061</b>	<b>1.404.291.842</b>	<b>5.398.450.733</b>	<b>1.440.220.723</b>	<b>-3,72</b>	<b>2,56</b>

Source: MDIC – Ministério da Indústria, Comércio Exterior e Serviços



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SÃO PAULO

# Brazilian Imports of Textile and Manufactured Products by Product

							Variation		
	JAN - DEC/2018			JAN - DEC/2019			JAN - DEC/2019 JAN - DEC/2018		
	1000 FOB	Ton	US\$/Kg	1000 FOB	Ton	US\$/Kg	1000 FOB	Ton	US\$/Kg
<b>Grand total</b>	<b>5.649.730</b>	<b>1.434.280</b>	<b>3,94</b>	<b>5.409.027</b>	<b>1.451.142</b>	<b>3,73</b>	<b>-4,26</b>	<b>1,18</b>	<b>-5,37</b>
<b>Grand Total (Without Cotton Fiber)</b>	<b>5.606.873</b>	<b>1.404.292</b>	<b>3,99</b>	<b>5.398.451</b>	<b>1.440.221</b>	<b>3,75</b>	<b>-3,72</b>	<b>2,56</b>	<b>-6,12</b>
<b>1. Textile fibers</b>	<b>381.654</b>	<b>206.786</b>	<b>1,85</b>	<b>291.986</b>	<b>186.893</b>	<b>1,56</b>	<b>-23,49</b>	<b>-9,62</b>	<b>-15,35</b>
1.01. Polyamide	9.053	1.869	4,85	9.009	1.422	6,34	-0,49	-23,90	30,77
1.02. Polyester	199.663	116.106	1,72	150.549	113.408	1,33	-24,60	-2,32	-22,80
1.03. Acrylic	24.821	9.354	2,65	20.148	8.118	2,48	-18,83	-13,21	-6,47
1.04. Viscose	29.259	13.928	2,10	32.441	17.907	1,81	10,88	28,57	-13,76
1.05. Acetate Cables	5.840	1.266	4,61	2.088	498	4,19	-64,24	-60,63	-9,19
1.06. Wool / Fur / Tops	5.563	1.062	5,24	4.838	1.141	4,24	-13,03	7,44	-19,05
1.07. Linen	2.401	743	3,23	2.405	700	3,44	0,16	-5,80	6,33
1.09. Cotton	42.857	29.988	1,43	10.577	10.921	0,97	-75,32	-63,58	-32,24
1.10. Jute	4.115	5.478	0,75	6.616	8.103	0,82	60,77	47,91	8,69
1.12. Silk	3.159	43	74,28	1.956	34	58,40	-38,07	-21,23	-21,38
1.13. Other natural	39	11	3,55	128	206	0,62	223,93	1.763,49	-82,62
1.14. Other artificial / synthetic	54.882	26.940	2,04	51.230	24.434	2,10	-6,65	-9,30	2,92
<b>2. Yarns</b>	<b>468.093</b>	<b>193.561</b>	<b>2,42</b>	<b>416.120</b>	<b>188.622</b>	<b>2,21</b>	<b>-11,10</b>	<b>-2,55</b>	<b>-8,78</b>
2.1. Silk	1.246	5	241,44	1.272	3	450,89	2,06	-45,35	86,75
2.2. Wool / Fur	219	17	13,13	188	10	19,41	-14,24	-41,98	47,79
2.3. Cotton	38.828	13.984	2,78	24.265	9.637	2,52	-37,51	-31,08	-9,32
2.4. Linen	1.123	120	9,36	1.924	173	11,12	71,27	44,06	18,88
2.5. Ramie	16	2	10,31	19	2	9,11	16,01	31,31	-11,66
2.6. Artificial and Synthetic	422.384	175.904	2,40	383.056	174.362	2,20	-9,31	-0,88	-8,51
2.7. Jute	3.870	3.226	1,20	5.028	4.186	1,20	29,93	29,75	0,14
2.8. Others	407	303	1,34	369	249	1,48	-9,32	-17,73	10,23

Source: MDIC – Ministério da Indústria, Comércio Exterior e Serviços



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	1000 FOB	Ton	US\$/Kg	1000 FOB	Ton	US\$/Kg	1000 FOB	Ton	US\$/Kg
<b>3. Filaments</b>	<b>854.236</b>	<b>403.668</b>	<b>2,12</b>	<b>854.980</b>	<b>427.179</b>	<b>2,00</b>	<b>0,09</b>	<b>5,82</b>	<b>-5,42</b>
3.1. Polyamide	229.350	49.880	4,60	251.755	56.054	4,49	9,77	12,38	-2,32
3.2. Polyester	551.679	341.076	1,62	528.775	357.873	1,48	-4,15	4,92	-8,65
3.2.1. POY polyester	93.708	68.176	1,37	85.034	71.452	1,19	-9,26	4,81	-13,42
3.2.2. Industrial Polyester	57.042	26.824	2,13	53.320	27.174	1,96	-6,52	1,31	-7,73
3.2.3. Other Polyesters	400.929	246.076	1,63	390.422	259.247	1,51	-2,62	5,35	-7,57
3.3. Viscose	5.746	1.223	4,70	4.384	970	4,52	-23,71	-20,65	-3,85
3.4. Acetate	736	120	6,13	717	118	6,06	-2,53	-1,43	-1,12
3.5. Spandex	36.079	6.076	5,94	37.477	6.459	5,80	3,87	6,30	-2,28
3.6. Others	30.646	5.293	5,79	31.872	5.704	5,59	4,00	7,78	-3,51
<b>4. Fabrics</b>	<b>1.157.850</b>	<b>285.383</b>	<b>4,06</b>	<b>1.208.043</b>	<b>309.053</b>	<b>3,91</b>	<b>4,34</b>	<b>8,29</b>	<b>-3,66</b>
4.1. Silk	6.399	45	142,32	3.652	30	123,32	-42,93	-34,13	-13,35
4.2. Wool / Fur	4.445	115	38,60	3.154	57	55,05	-29,04	-50,25	42,63
4.3. Cotton	106.146	17.787	5,97	76.097	12.282	6,20	-28,31	-30,95	3,83
4.4. Linen	15.993	2.151	7,44	11.500	1.330	8,65	-28,09	-38,17	16,30
4.5. Ramie	98	7	15,02	166	6	26,87	70,44	-4,71	78,86
4.6. Jute	119	56	2,11	199	92	2,17	66,68	62,70	2,45
4.7. Filaments	495.496	138.041	3,59	497.178	145.318	3,42	0,34	5,27	-4,68
4.7.1. Synthetic Filaments	475.358	134.209	3,54	485.257	142.702	3,40	2,08	6,33	-3,99
4.7.2. Artificial Filaments	20.138	3.833	5,25	11.921	2.616	4,56	-40,80	-31,75	-13,26
4.8. Discontinuous Fibers	185.033	37.823	4,89	241.874	54.819	4,41	30,72	44,94	-9,81
4.8.1. Synthetic	40.975	7.784	5,26	32.082	6.038	5,31	-21,70	-22,44	0,94
4.8.2. Artificial	144.058	30.039	4,80	209.791	48.781	4,30	45,63	62,39	-10,32
4.9. Mesh	344.121	89.357	3,85	374.222	95.119	3,93	8,75	6,45	2,16
4.9.1 Cotton	2.605	544	4,79	5.407	1.008	5,36	107,58	85,48	11,92
4.9.2. Artificial and Synthetic	298.375	79.257	3,76	326.235	83.580	3,90	9,34	5,45	3,68
4.9.3. Others	43.142	9.556	4,51	42.579	10.530	4,04	-1,30	10,19	-10,44

Source: MDIC – Ministério da Indústria, Comércio Exterior e Serviços



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							1000 FOB	Ton	US\$/Kg
<b>5. Sewing Threads</b>	<b>7.246</b>	<b>890</b>	<b>8,14</b>	<b>5.391</b>	<b>649</b>	<b>8,31</b>	<b>-25,60</b>	<b>-27,05</b>	<b>1,99</b>
5.1. Cotton	1.673	266	6,29	585	104	5,60	-65,06	-60,71	-11,07
5.2. Synthetic Filaments	3.823	417	9,16	2.813	273	10,31	-26,42	-34,60	12,50
5.3. Artificial Filaments	61	10	5,98	187	14	13,14	205,90	39,23	119,71
5.4. Discontinuous Artificial Fibers	56	7	8,36	53	6	8,46	-4,95	-6,04	1,16
5.5. Discontinuous Synthetic Fibers	1.633	190	8,61	1.754	251	6,98	7,41	32,41	-18,88
<b>6. Clothing</b>	<b>2.051.013</b>	<b>176.152</b>	<b>11,64</b>	<b>1.900.398</b>	<b>163.133</b>	<b>11,65</b>	<b>-7,34</b>	<b>-7,39</b>	<b>0,05</b>
6.1. Clothing	1.794.044	119.024	15,07	1.657.196	105.724	15,67	-7,63	-11,17	3,99
6.1.1. Mail Garments	881.646	66.012	13,36	859.983	64.326	13,37	-2,46	-2,55	0,10
6.1.1.1. Cotton	307.025	19.579	15,68	293.613	17.249	17,02	-4,37	-11,90	8,55
6.1.1.2. Artificial and Synthetic	447.488	36.432	12,28	426.857	35.659	11,97	-4,61	-2,12	-2,54
6.1.1.3. Others	127.133	10.001	12,71	139.514	11.418	12,22	9,74	14,17	-3,88
6.1.2. Flat Cloth Garments	912.398	53.012	17,21	797.213	41.397	19,26	-12,62	-21,91	11,89
6.1.2.1. Cotton	266.838	13.594	19,63	223.058	10.465	21,32	-16,41	-23,02	8,59
6.1.2.2. Artificial and Synthetic	494.765	31.275	15,82	416.909	21.868	19,06	-15,74	-30,08	20,51
6.1.2.3. Others	150.794	8.143	18,52	157.246	9.064	17,35	4,28	11,32	-6,32
6.2. Bed, bath and table linen	150.926	28.958	5,21	141.581	27.504	5,15	-6,19	-5,02	-1,23
6.2.1 Cotton	38.920	4.467	8,71	34.820	3.833	9,08	-10,53	-14,19	4,27
6.2.2. Artificial and Synthetic	104.115	23.239	4,48	99.781	22.656	4,40	-4,16	-2,51	-1,69
6.2.3. Others	7.892	1.252	6,30	6.979	1.015	6,88	-11,56	-18,92	9,08
6.3. Curtains	19.510	3.215	6,07	18.141	3.218	5,64	-7,02	0,09	-7,10
6.3.1 Cotton	230	19	11,85	111	7	16,00	-51,76	-64,27	35,03
6.3.2. Artificial and Synthetic	18.526	3.157	5,87	17.119	3.127	5,47	-7,59	-0,93	-6,72
6.3.3. Others	753	38	19,59	910	83	10,95	20,85	116,26	-44,12
6.4. Other Made Items	86.533	24.955	3,47	83.480	26.688	3,13	-3,53	6,94	-9,79
6.4.1. Cotton	948	56	16,92	835	51	16,48	-11,88	-9,50	-2,62
6.4.2. Artificial and Synthetic	20.328	7.061	2,88	19.582	7.029	2,79	-3,67	-0,45	-3,23
6.4.3. Others	65.257	17.838	3,66	63.062	19.608	3,22	-3,36	9,92	-12,09

Source: MDIC – Ministério da Indústria, Comércio Exterior e Serviços



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<b>7. Other manufactures</b>	<b>729.638</b>	<b>167.840</b>	<b>4,35</b>	<b>732.108</b>	<b>175.614</b>	<b>4,17</b>	<b>0,34</b>	<b>4,63</b>	<b>-4,10</b>
7.1. Pastes, felts, nonwovens, etc.	261.052	69.125	3,78	274.157	75.698	3,62	5,02	9,51	-4,10
7.1.1. Cotton	1.083	191	5,67	1.743	320	5,45	60,88	67,16	-3,75
7.1.2. Artificial and Synthetic	174.109	46.032	3,78	177.649	46.716	3,80	2,03	1,49	0,54
7.1.3. Others	85.860	22.902	3,75	94.765	28.663	3,31	10,37	25,15	-11,81
7.2. Rugs and Carpets	90.162	25.274	3,57	89.621	26.396	3,40	-0,60	4,44	-4,82
7.2.2. Artificial / Synthetic	42.945	13.963	3,08	42.431	13.558	3,13	-1,20	-2,90	1,76
7.2.3. Others	47.217	11.310	4,17	47.190	12.838	3,68	-0,06	13,50	-11,95
7.3. Special fabrics, lace, embroidery	90.798	14.267	6,36	91.470	14.046	6,51	0,74	-1,55	2,33
7.3.1. Cotton	7.738	879	8,80	8.089	787	10,28	4,54	-10,50	16,80
7.3.2. Artificial and Synthetic	58.580	8.709	6,73	61.484	8.489	7,24	4,96	-2,52	7,67
7.3.3. Others	24.480	4.679	5,23	21.897	4.770	4,59	-10,55	1,93	-12,24
7.4. Impregnated fabrics, technical	287.626	59.174	4,86	276.860	59.475	4,66	-3,74	0,51	-4,23
7.4.2. Artificial and Synthetic	72.111	18.241	3,95	73.502	18.974	3,87	1,93	4,02	-2,01
7.4.3. Others	215.514	40.933	5,27	203.358	40.501	5,02	-5,64	-1,06	-4,63

Source: MDIC – Ministério da Indústria, Comércio Exterior e Serviços



# Textiles Market Overview in Brazil

- ✓ Brazil is the fifth largest textile industry in the world, with a history that has lasted more than 200 years, in addition to being the fourth largest in garments. The only South American country to occupy a prominent place in the sector, accounts for 2.4% of the global production of textiles and 2.6% of the world production of garments.

## **Trends:**

**Resources:** in a world in which awareness the importance of sustainability is growing, the re-use of waste is an alternative to the waste of natural resources. Recycling is also seen as a major trend;

**Retail:** among the trends for the sale of products are the better use of e-commerce, which allows the purchase and sale through the internet; the collection of used clothes and their re-use are also on the rise, mainly because the consumption behavior of society is changing;

**Consumption:** people are increasingly aware and attentive to the attitude of the brands they consume. The origin of the manufacture of products, for example, gains more and more importance.



# Textiles Qualitative Market Survey Results

## 70 Brazilian companies' interviews





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# Brazilian companies respondents profile

- ✓ 72 respondent companies;
- ✓ Almost 70% from São Paulo State, being 32% of São Paulo city;

Mentioned States:

MG = Minas Gerais

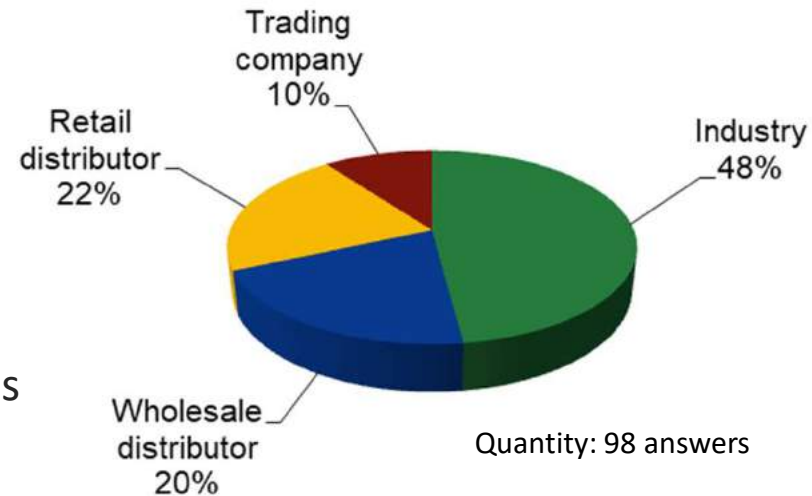
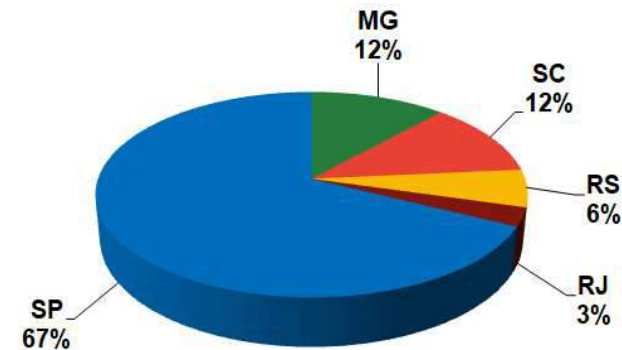
SC = Santa Catarina

RS = Rio Grande do Sul

RJ = Rio de Janeiro

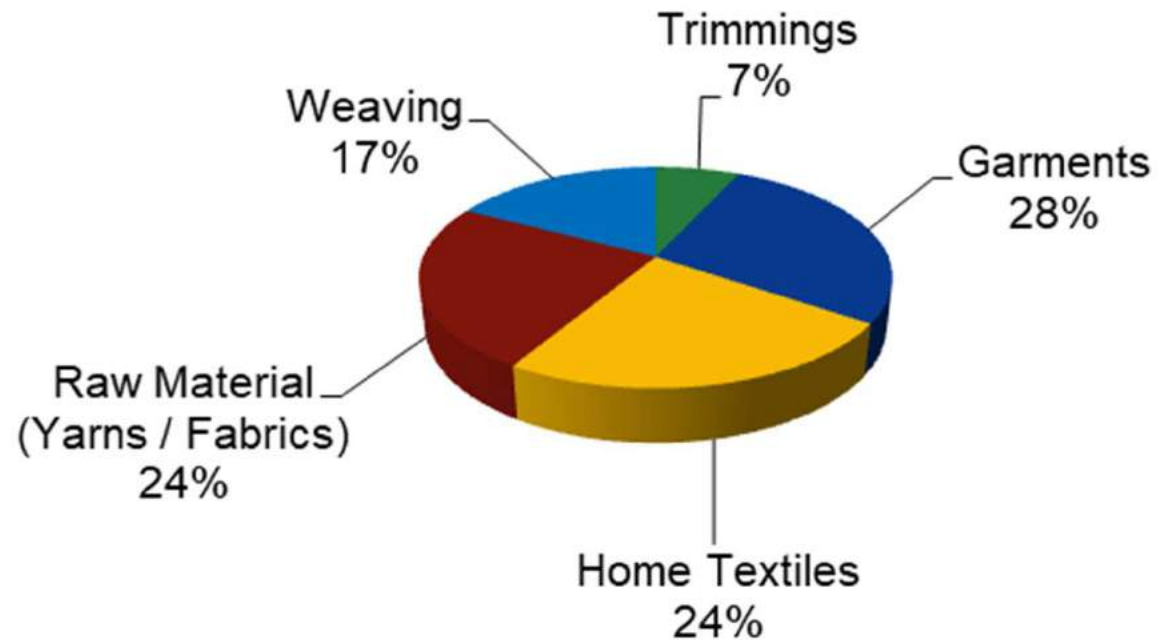
SP = São Paulo

- ✓ São Paulo and Americana cities represent 54% of the respondents;
- ✓ 30 different cities from 5 Brazilian States;
- ✓ Company profile: almost 50% industries and almost 50% commerce.



# Brazilian companies' respondents profile

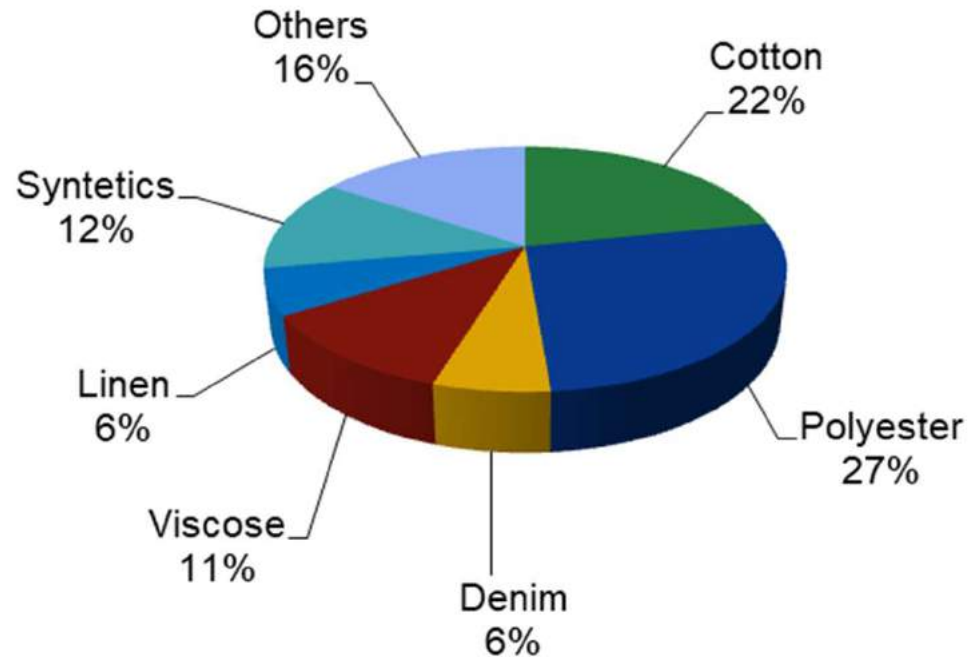
## Business Segment



Total: 116 answers from 70 interviews

# Brazilian companies' respondents profile

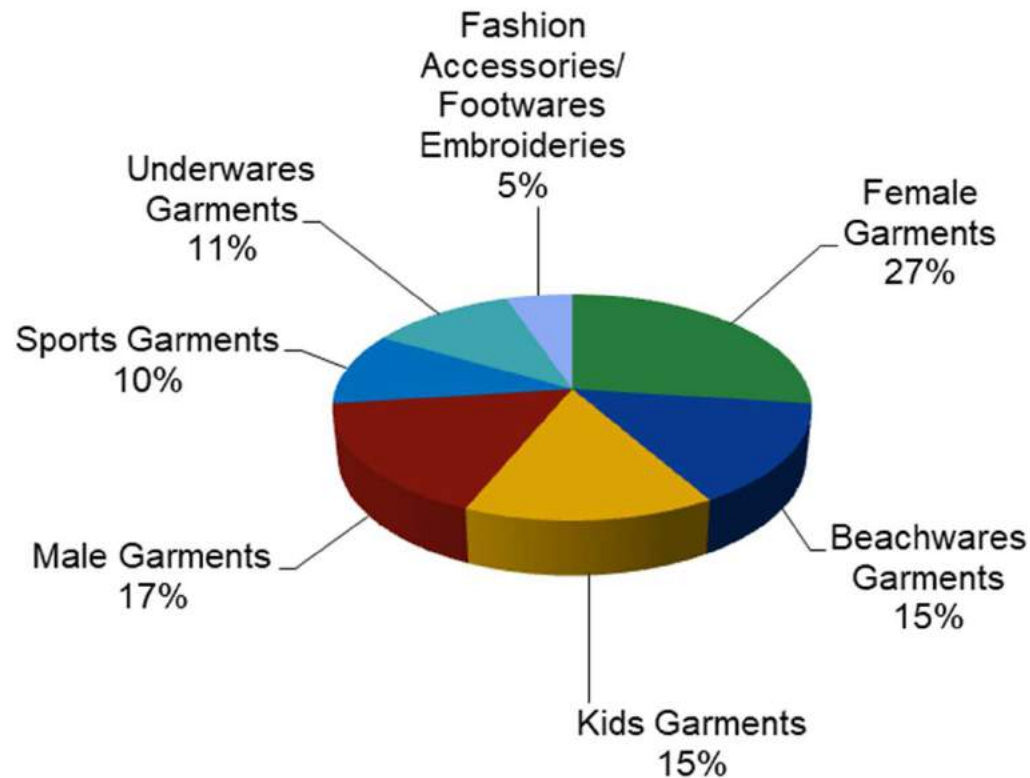
## Fabrics Profile



Total: 47 of interviewed companies work with fabrics.

# Brazilian companies' respondents profile

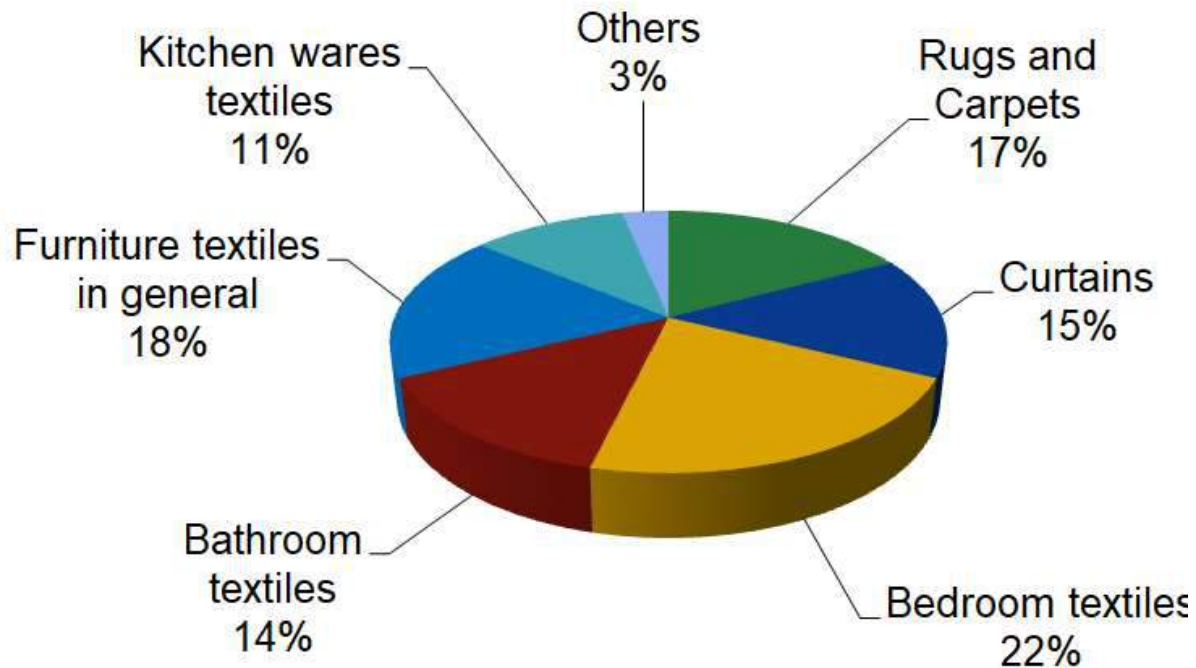
## Garments Profile



Total: 32 of interviewed companies work with garments.

# Brazilian companies' respondents profile

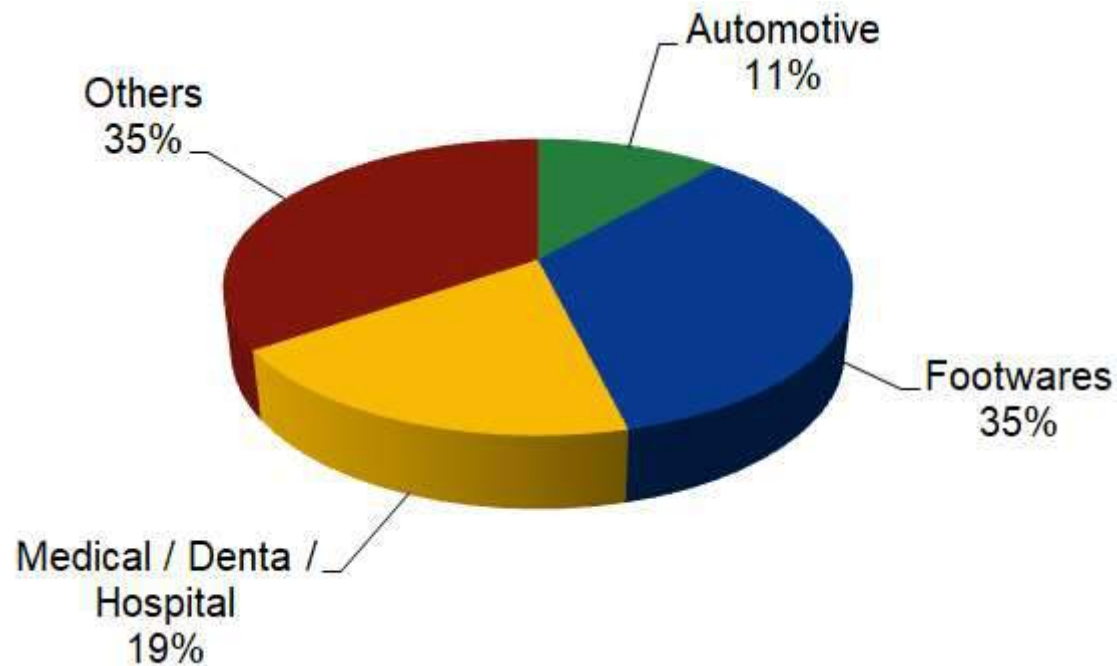
## Home Style Profile



Total: 28 of interviewed companies work with garments.

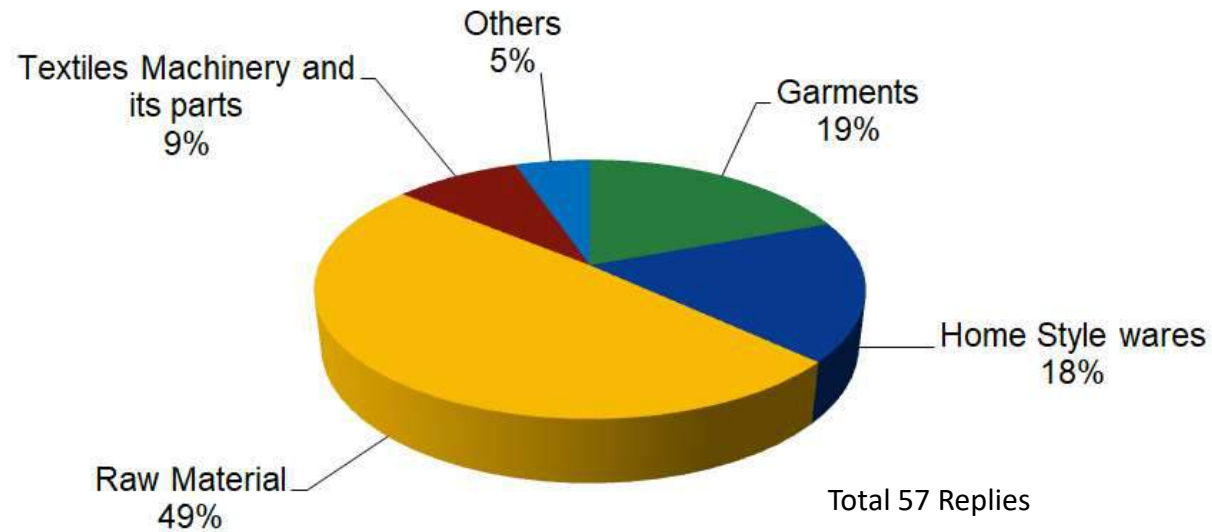
# Brazilian companies' respondents profile

## Other Segments Profile



Total: 24 of interviewed companies work with other segments.

# Which are the top 10 main important products for your imports?



**Garments:** Dresses/ Blouses/ Coats/ T-shirts/ Skirts/ Beachwares/ Pants/ Jackets/ Tricot/ Underwares/ Pajamas/ Sportswares

**Home Style wares:** Cushions/ Cushions Covers/ Curtains/ Bed Covers / Quilts/ Rugs and Carpets/ Towels/ Sheets/ Comforter/ Layettes/ Pet Textiles Line

**Raw Material:** Yarns/ Fibers/ Fabrics/ Embroideries/ Trimmings

**Textiles Machinery and its parts**

**Others:** Not importing at the moment



# Which are the top 10 main important products for your imports?

## Some of the mentioned HS codes are:

HS 58062000 and 58063200: Cotton yarns, Polyester yarns, synthetic and natural rubber, jute yarns.

HS 3809: Polyamide yarn and dyes.

HS 5205: Fabrics in cotton, polyester, linen and jeans.

HS 5407.51.00, 5407.52.10 and 5407.61.00: Plain polyester fabrics.

HS 6005.37.00, 6004.10.42, 6005.36.00: Lace.

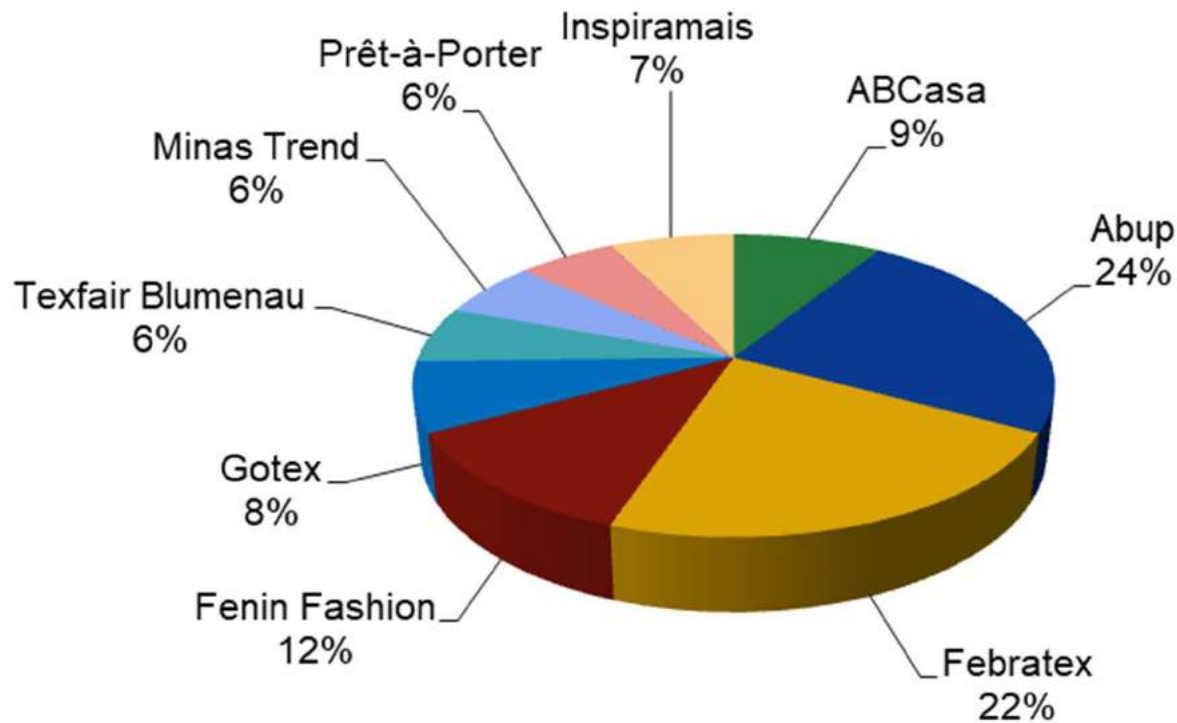
HS 5903.20.00: Synthetic leather.

HS 5810.92.00: Fabrics embroidered in pieces / sequins.

HS 5211.32.00: Denim fabrics.

HS 4202.22.10: Synthetic leather bags.

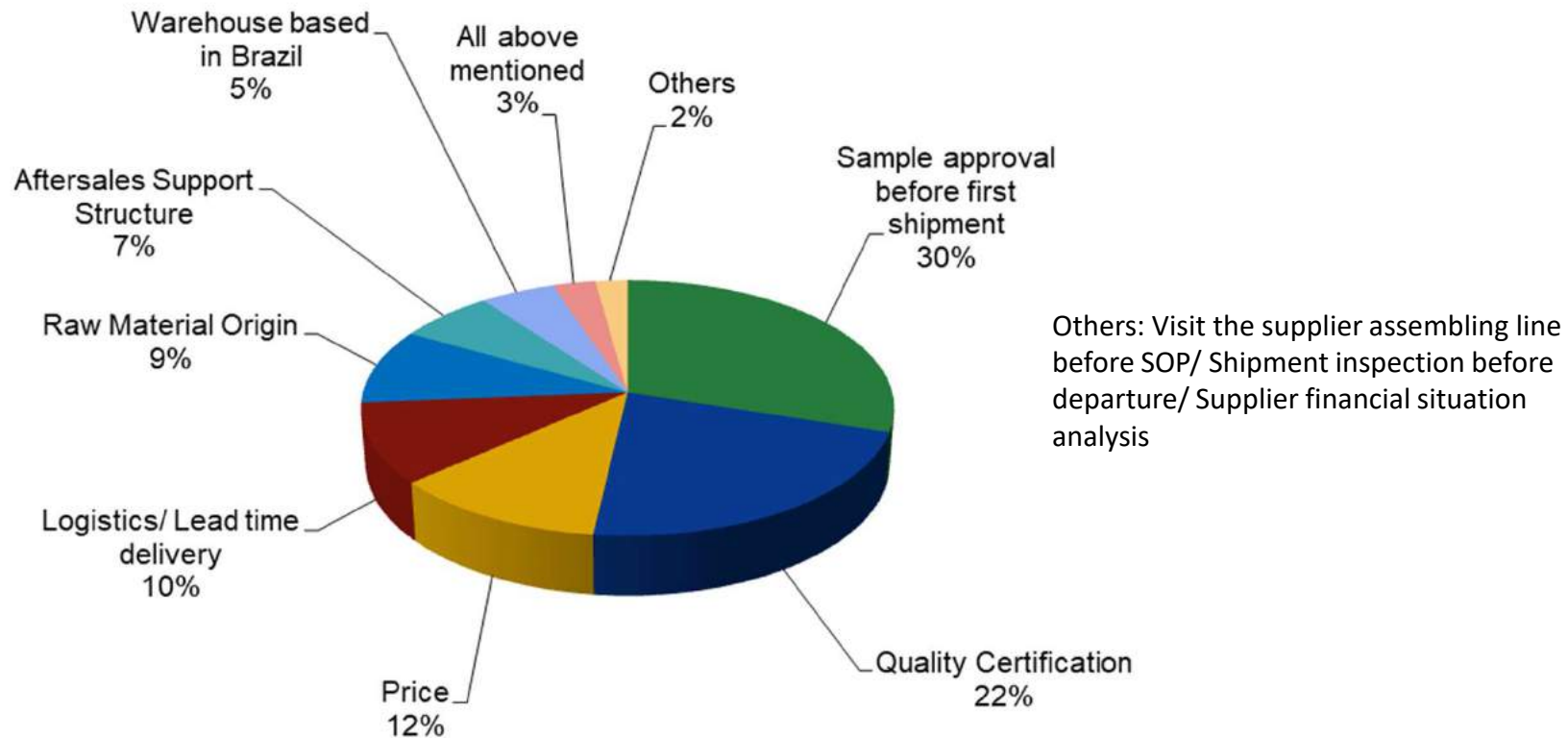
# What are the most important textiles trade shows in Brazil in your opinion?



40 respondents = 56% of the total sample

Many interviewed buyers did not know the answer about important trade shows, which means that they are not focused on trade shows to their purchasing analysis.

# Basic requirements for approving a new foreign supplier



49 respondents = 68% of the total sample

Sample approve before first shipment + Quality Certification + Price = 64% of the total answers



# Does your company request any compulsory certification/ approval or any specific requirements for its suppliers?

Some comments mentioned during the survey:

- 1 Receita Federal import license
- 1 BSCI Technical Advisory certificate with grades A or B
- 1 Homologation by our quality department
- 1 Report of exemption of phthalates and of not using raw materials of animal origin
- 1 Pre-shipment inspection
- 1 Reach regulations
- 1 Product quality and delivery according to company requirements
- 2 ABVTEX stamp
- 3 All products must present quality certification
- 1 Restrictive substances in fabrics components
- 1 ZDHC for Sustainability (zero disposal of hazardous chemicals)
- 11 No specific demands

# Summing up the Results





# Textiles Survey Results

- ✓ There's a good potential to Indian companies to export more to Brazil, however, at the moment, the dollar rate is not favorable for Brazilian imports, the trade balance shows the local industry bad situation, and the retail is also suffering the market impact;
- ✓ Brazil is a cotton producer and exporter; however the Indian cotton shows some price and quality advantages, and is also a potential product to import;
- ✓ China is growing their business in Brazil, offering more competitive prices with good quality. They represent 55% of the Brazilian textiles market imports;
- ✓ Trends: The importance of sustainability, the re-use of waste is an alternative to the waste of natural resources. Recycling is seen as a major trend. And the retail mayor trend is the e-commerce structure;
- ✓ Garments, Fabrics and Filaments are the most demanded products of the Brazilian textile's imports.



# Textiles Survey Results

✓ About the 70 Brazilian companies' interviews:

## Importance of imports:

49% answered: Raw Material (Yarns/ Fibers/ Fabrics/ Embroideries/ Trimmings)

19% answered: Garments (Dresses/ Blouses/ Coats/ T-shirts/ Skirts/ Beachwares/ Pants/ Jackets/ Tricot/ Underwares/ Pajamas/ Sportswares)

18% answered: Home Style wares (Cushions/ Cushions Covers/ Curtains/ Bed Covers / Quilts/ Rugs and Carpets/ Towels/ Sheets/ Comforter/ Layettes/ Pet Textiles Line)

## Importance of local trade shows:

Abup focused in Home Wares Textiles and Ornamentation = 24% of the replies

Febratex focused in Textiles Raw Material and Machinery = 22% of the replies

Fenin Fashion focused in Garments = 12% of the replies



# Textiles Survey Results

✓ About the 70 Brazilian companies' interviews:

Basic requirements for approving a new foreign supplier:

30% answered: Sample approval before first shipment

22% answered: Quality Certification

12% answered: Price

10% answered :Logistics/ Lead time delivery



# Recommendations

- ✓ Organize an Indian BSM or exhibition in Febratex Summit 2021 and/or in Santa Catarina State;
- ✓ Develop and prepare the buyers database during 2020, second semester;
- ✓ For those focused in home textiles wares: plan Abup and ABCasa shows visit in 2021 in Sao Paulo;
- ✓ For those focused in textiles raw material: visit Febratex show in Feb 2021;
- ✓ For those focused in garments: visit Fenin Show in January 2021 in Sao Paulo and in Gramado cities;
- ✓ Get more information about the new trends for textiles regulations and standards as since the last 3 years ABNT (Brazilian Association of Technical Standards) and the local industry started to demand new rules for the textiles manufacturing. OEKO-Tex is one of the important certifications that the textiles companies must have. There're many certifications and auditing companies in Brazil and in Europe to provide these services for Indian companies to adapt their quality certifications properly.
- ✓ OEKO-Tex demands: Forbidden products in the textile supply chain accordingly to the restrict substance list: phthalates, halogenated solvents, alkylphenols, ethoxylated alkylphenols (Apeo), azo dyes, chemical sensitizers, or other components containing discharge hazardous chemicals.



# Recommendations

## **About quality certifications and requirements to export to Brazil:**

- ✓ ABVTEX quality inspection and seal is focused in the textile retail and to its supply chain, however, is not mandatory to have it. (avoiding slave labor and lack of ethics).
- ✓ OKEO-Tex - ZDHC for Sustainability (zero disposal of hazardous chemicals) - is an important certification for textiles manufacturers, specially textiles raw material, focused on sustainability. It's not mandatory to have it, however, the future trends point to it as a basic skill for a textile supplier.
- ✓ BSCI - The Business Social Compliance Initiative is a leading business-driven initiative for companies committed to improving working conditions in the global supply chain. BSCI unite more than 900 companies around a development-oriented system applicable to all sectors and sourcing countries. Not mandatory in Brazil, but also very respected and globally recognized.
- ✓ Brazilian Receita Federal (Government Portal) demands many bureaucracy issues, therefore, is necessary to hire a local experienced trading company with law, logistics, financial, and administrative support. There're online registration demands, taxes to pay accordingly to the type of merchant, product category, and many other legal details to pass through the Brazilian customs.



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# Appendix – Febratex Show

<http://www.febratex.com.br/>

- ✓ Dates: Feb 2<sup>nd</sup> to 5<sup>th</sup> 2021 Santa Catarina state - Brazil.
- ✓ Focused on textiles machinery/ raw material
- ✓ Show Hours: From 2pm to 10pm.
- ✓ Sq m value for exhibition: U\$270 (including stall construction as description below)
- ✓ Last edition: 400 exhibitors, 2.400 representative brands, 50.000 visitors.
- ✓ No space available to new exhibitors to participate to 2021 edition however, there're possibilities to develop a trade mission visitation with B2B meetings and access to visit the show, or to participate to 2022 edition.



## Includes:

- Modular structure in aluminum
- White TS panels
- Graphite carpet
- Fascia board with exhibitors' logotype illuminated with 01 spot 60W measuring 0.48 x 0.96
- 02 Fluorescent lamps for each 15 sqm
- 01 Universal socket for each

6sqm booth

- 01 Information desk measuring 1.00 x 0.50
- 01 Table
- 03 Chairs
- 01 Stool
- 02 Shelves layers
- 01 Deposit lockable door
- 01 Extinguisher per booth
- 01 KWA for each booth

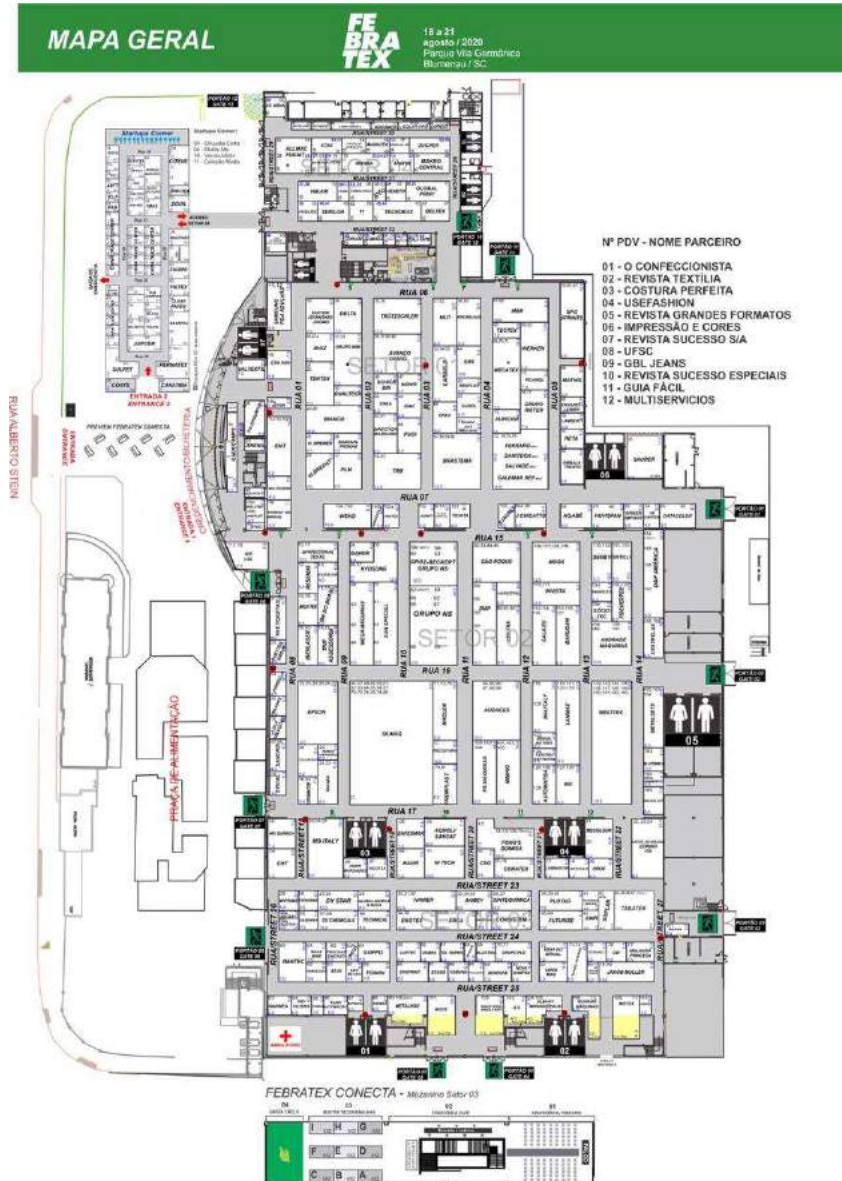




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# Appendix – Febratex Show

2021  
Edition:  
no space  
available



# Appendix – FENIN Show

<http://www.fenin.com.br/>

- ✓ Dates: Jan 10<sup>th</sup> and 12<sup>th</sup> 2021 in Sao Paulo Brazil, and 26<sup>th</sup> to 29<sup>th</sup> Jan in Gramado – Rio Grande do Sul state in Brazil.
- ✓ Focused on garments and trimmings. Also denim show.
- ✓ Separated BSM in a hotel/venue in São Paulo and/or in Gramado city (before/during/after) Fenin show.

**NOTÍCIAS DO MERCADO**

O MELHOR DO CONTEÚDO DA FENIN QUE VOCÊ NÃO PODE PERDER!

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FENIN FASHION GRAMADO OUTONO/INVERNO 2020 começa (...)



FAZZOLETTI inova na FENIN Inverno 2020(...)



QUESTION apresenta sua esportiva na FENIN Inv(...)

- ✓ Sq m value for exhibition: U\$180,00.
- ✓ In São Paulo show, the visitation is predominantly from the southeastern and central-west regions upwards and orders in greater quantity (large wholesale distributors).
- ✓ In Gramado show, visitation is predominantly from the southern region (Rio Grande do Sul, Santa Catarina, Paraná states) and there are small and medium-sized retailers and large chains as well. There are around 10,000 storeowners at these shows and around 250 exhibitors (more than 1,000 brands, considering that each exhibitor usually manages more than one brand).



# Appendix – BSM Budget

Considering the lack of availability space in the main trade shows, is recommendable to develop an Indian delegation trade mission through an independent BSM in an established period next to these shows.

## Estimated BSM Budget Planning in Brazil:

- Venue rental per day x 2 days = US\$4.000,00 in Blumenau or Gramado, and US\$8.000,00 in São Paulo city
- Catering service = US\$1.200,00
- Staff team: Interpreters/ Photo and filming/ reception desk/ attendees' control = US\$1.800,00
- BSM Management Agency = Buyers Database Management + meetings agenda schedule + RSVP service and local support management = US\$12.000,00
- Communication Campaign = Campaign creation/ BSM webpage / Translation from English to Portuguese/ Social Medias/ printed material distribution/ PR services = US\$4.000,00



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