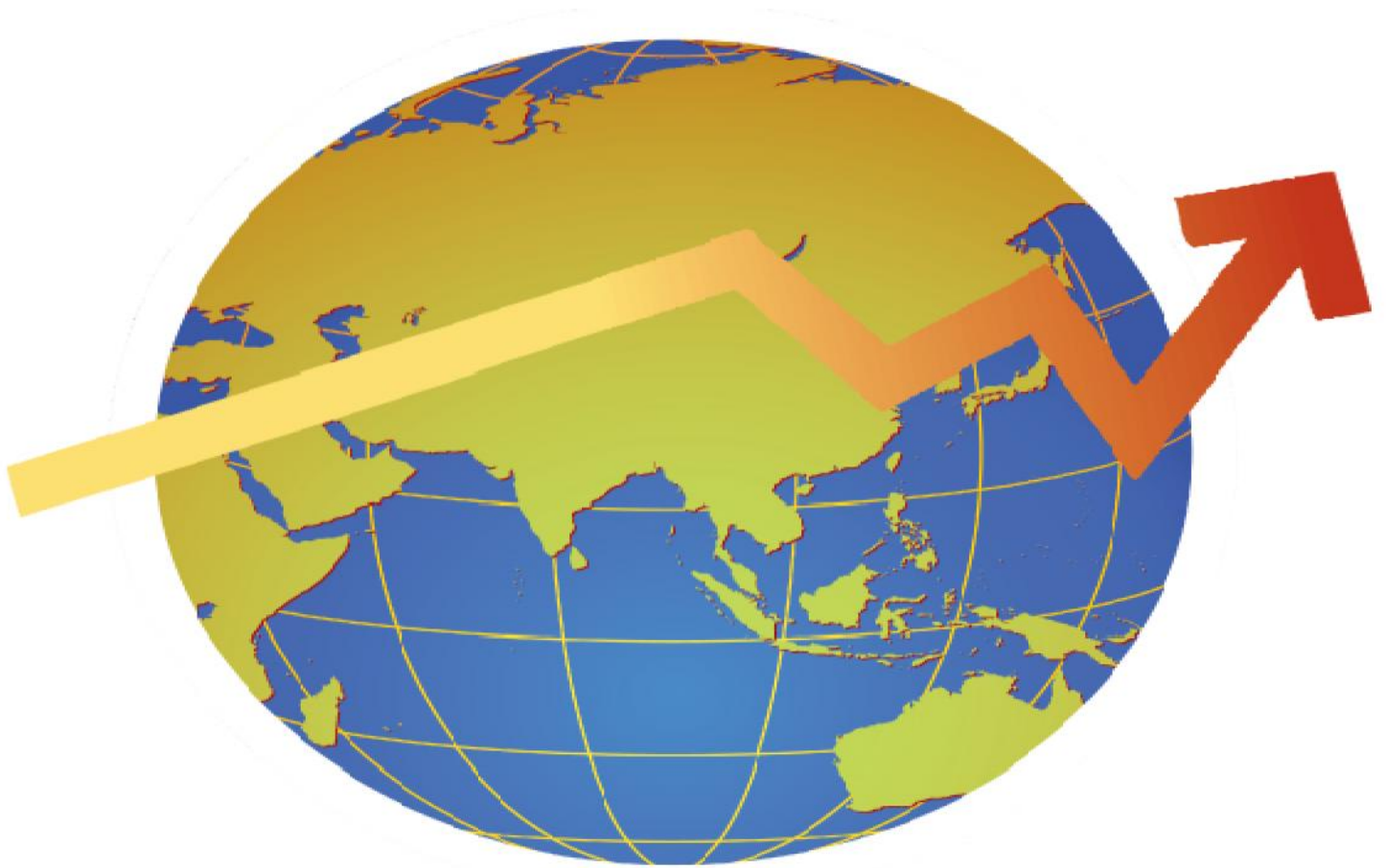


***Export Competitiveness of Combed Cotton Content HS
520522: (>85% 25.41-30.738.27-25.41 Count)***



**GLOBAL
TRADE
ANALYSIS**

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Preface

The Textiles Committee has been providing valuable databases on different facts of T&C industry to the industry stakeholders and policy makers for deriving well informed policy decision & business strategy. Due to the onslaught of RTA, FTA & Multilateral Trade Agreements under the framework of WTO, the competition among the textile exporting countries has also been growing giving rise to challenges in the form of price and quality competitiveness. To deal with the situation successfully countries, may requires comprehensive product wise database on production, export, import, cost competitiveness etc.

In order to support the trade & industry through analysis and dissemination, the Textiles committee is preparing a comprehensive database on the different facets of the textiles sector like production, demand, exports, cost of production, tariffs etc. , through Market Intelligence in Textiles (MIT).

This discussion paper “Export Competiveness of Combed Cotton Content HS 520522: (>85% 25.41-30.738.27-25.41 Count)” attempts to delineate the global players in this product through their global exports, imports vis-e-vis India. Efforts are made to present the information in user friendly format. I hope this paper will be useful to the readers and help in understanding the international trade in Cotton Yarn (HS 520522) in a better way. The valued suggestions and comments from the readers are welcome.

I appreciate the efforts put in by Shri T.K Rout, Deputy Director, Ms Deepti Lahane, Research Associate and the team of researcher who have been instrumental to bring out this data base series.

Place: Mumbai

(Dr. P. Nayak)

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I. Introduction

- The product: 520522 belong to the combed cotton yarn segment having cotton content more than 85% and a count of 8.27-25.41. It has a percentage share of 8.22% in total cotton yarn imports in the world.
- The total export value of this product in the world is 1034.58 Mn USD (2012) and the total import value is 984 Mn USD (2012). India is the leading exporter of this product in the world with an export value of 317.46 Mn USD (2012) and a market share of 30.68%. Pakistan stands at number 2 position with an export value of 142.65 Mn USD (2012) and a market share of 13.79%.

II. Objective

1. To understand the importance of 520522 in world cotton yarn trade.
2. To study the performance of top exporters and top importers of 520522 in the world.
3. To study the performance of top exporters in top import markets.
4. To find out target countries for export of 520522 in terms of volume and growth of market.

III. Methodology

- To fulfil the above objectives, we will consider the parameters of CAGR, % Share, RCA and UVR. The period taken into consideration is from 2004-2012.
- The data has been collected from various secondary sources like WITS, Ministry of Textiles, and Office of Textile Commissioner etc.
- The generated tables have been illustrated through the help of graphs/pie-charts/histograms wherever required.

IV. Limitations

- The sources of data are limited to secondary sources of collection like internet, international trade data websites, published reports etc. Therefore the accuracy of the report depends on the data collected from the secondary sources.
- There are only two sites available for export import data in international trade - WITS and ITC, Geneva. There is no other available source to validate the data collected from these sites. Hence, we have assumed that the export import figures as reported by these two websites are genuine and correct.
- The export import data collected from these websites show a significant gap, as in the export figure reported by the exporting country is not equal to the import figure reported by the importing country. Due to such differences, it is difficult to estimate the actual growth in exports/imports.
- Also, some of the data are missing for certain countries which do not allow us to present a clear trade picture.

V. Top Exporters (Value wise in Mn USD)

Table 1.1- Top exporters of 520522 (Value wise in Mn USD)

Top Exporters	2004	2005	2006	2007	2008	2009	2010	2011	2012	% Share	CAGR
India	45.65	61.57	112.18	152.69	199.52	143.26	247.58	301.03	317.46	30.68	27.43%
Pakistan	210.50	204.31	114.45	183.27	157.59	165.93	204.68	215.62	142.65	13.79	-4.75%
United States	81.01	107.04	51.90	58.89	117.89	76.06	116.06	128.27	112.92	10.92	4.24%
Hong Kong	232.25	216.44	197.53	199.76	148.97	131.54	169.29	116.41	84.53	8.17	-11.87%
China	168.87	131.82	128.79	118.22	104.83	97.20	125.39	92.88	76.72	7.42	-9.39%
Turkey	49.17	36.97	49.37	41.43	33.97	28.80	31.41	58.35	61.85	5.98	2.91%
Korea, Rep.	23.00	17.49	17.26	24.07	26.32	17.28	52.70	41.25	42.16	4.07	7.87%
Indonesia							24.24	26.66	27.78	2.69	7.05%
Thailand	2.32	11.04	14.17	25.44	17.92	8.72	26.07	23.00	27.18	2.63	36.01%
European Union	13.54	13.74	15.10	22.21	20.72	18.67	24.83	37.73	26.79	2.59	8.91%
Italy	28.21	18.58	19.59	25.17	22.72	21.05	22.17	34.84	21.91	2.12	-3.11%
Germany	27.03	25.29	25.19	24.57	17.34	15.01	17.89	24.19	17.18	1.66	-5.51%
Greece	32.78	27.11	23.36	22.05	16.29	11.10	15.50	16.86	14.20	1.37	-9.93%
Austria	11.72	11.91	10.93	12.87	11.53	11.94	13.38	20.46	11.13	1.08	-0.64%
Vietnam	2.02	6.29	8.84	12.07	70.70	9.62	12.55	15.30	9.93	0.96	22.01%
ROW	121.24	158.41	126.22	89.02	63.5	48.4	75.28	85.17	66.97	6.47	-7.15%
World	1035.80	1034.26	899.79	989.51	1009.09	785.91	1154.21	1200.31	1034.58	100.00	-0.01%

Figure (a) - Graphical representation of top exporters of 520522 (Market share value wise)

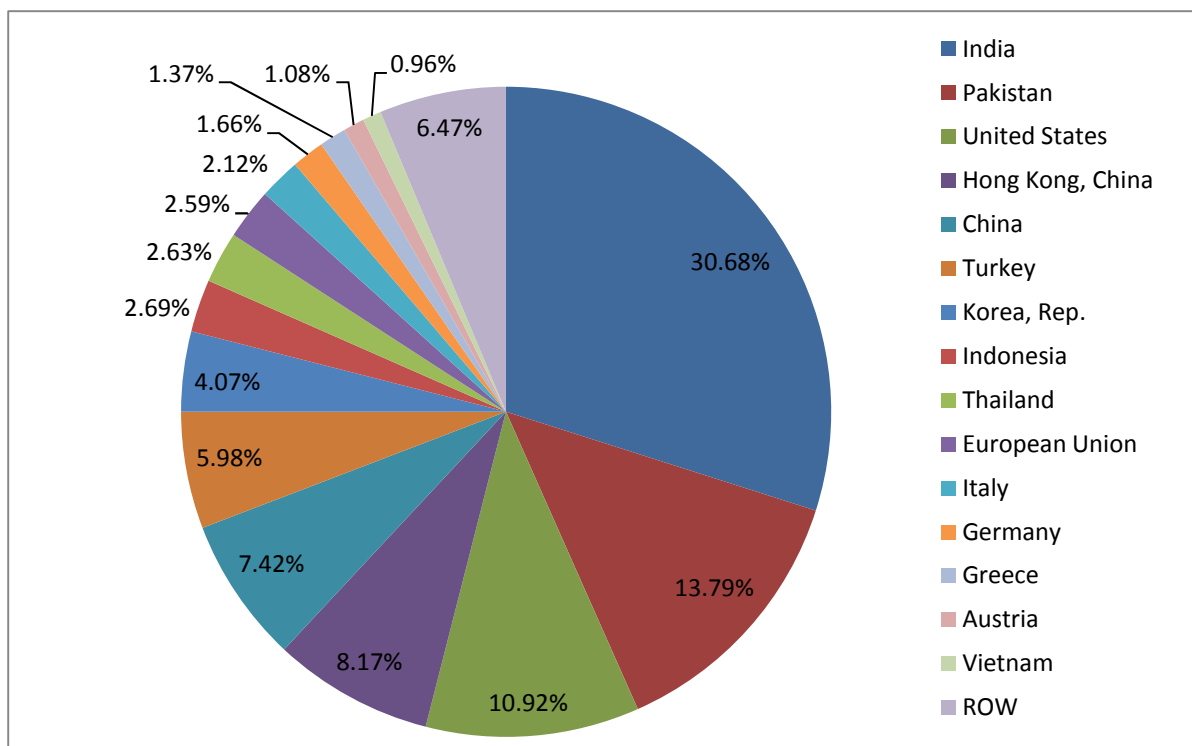
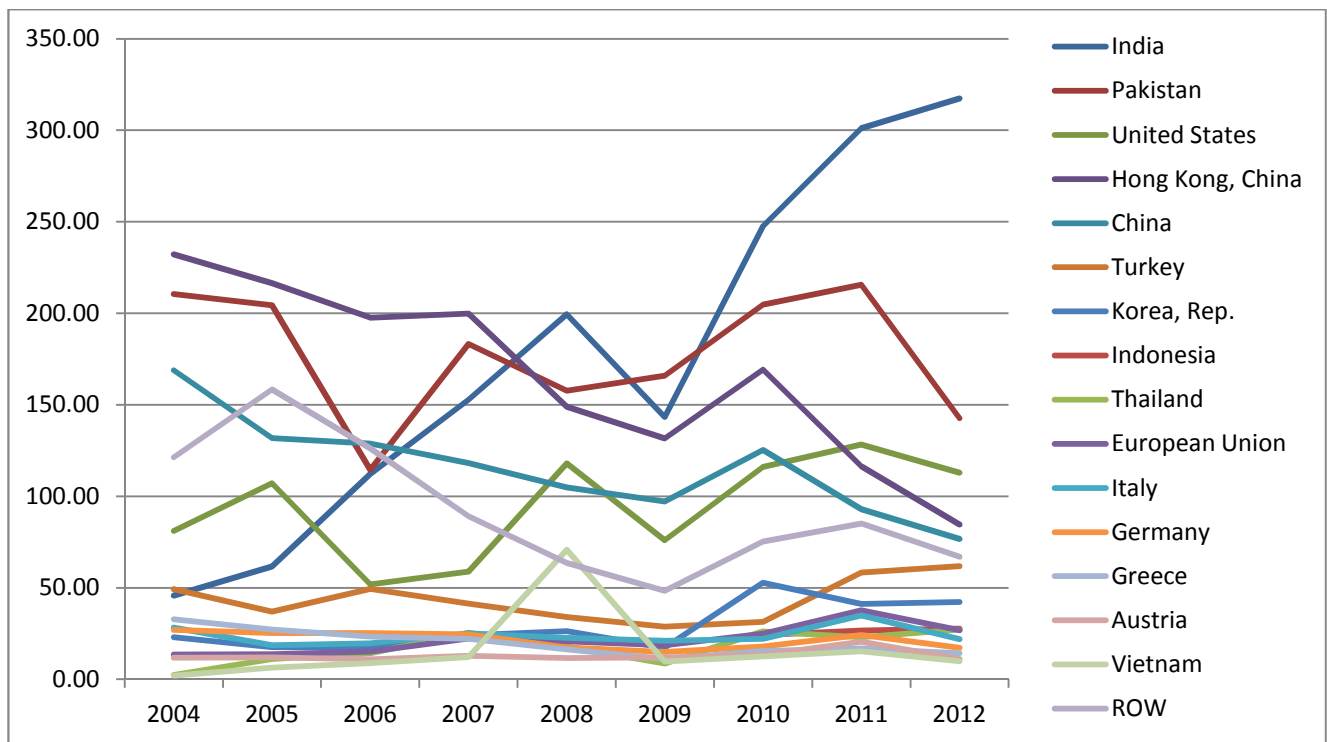


Figure (b) – Performance of top exporters of 520522 from 2004-2012 (Value wise)



Top Exporters (Volume wise in Mn Kg)

Table 1.2- Top exporters of 520522 (Volume wise in Mn Kg)											
Top Exporters	2004	2005	2006	2007	2008	2009	2010	2011	2012	% Share	CAGR
India	17.31	25.69	49.86	58.01	75.94	62.30	80.15	75.48	119.14	39.98	27.27%
Pakistan	87.70	91.60	49.24	78.01	64.31	75.53	61.42	48.16	41.92	14.07	-8.81%
United States	30.31	47.19	24.29	26.95	40.49	31.38	43.64	33.33	29.61	9.94	-0.29%
Hong Kong	80.44	85.51	74.88	78.09	53.93	49.16	48.99	27.13	22.54	7.56	-14.70%
China	57.63	49.08	45.25	39.39	31.12	30.56	30.68	16.42	16.09	5.40	-14.74%
Turkey	15.74	12.44	15.92	11.48	8.73	7.91	6.89	10.14	14.40	4.83	-1.11%
Thailand	0.79	4.37	5.47	11.68	8.72	3.71	8.32	5.88	11.31	3.80	39.38%
Korea, Rep.	7.27	6.22	5.76	8.97	8.82	6.25	13.82	8.93	11.25	3.78	5.61%
Indonesia							7.56	5.43	7.63	2.56	0.50%
European Union	2.40	2.46	2.57	3.70	3.16	3.25	3.50	4.20	3.42	1.15	4.54%
Germany	5.60	6.04	5.63	5.84	3.41	3.02	3.38	3.74	3.15	1.06	-6.94%
Greece	8.81	9.19	7.42	6.16	4.41	3.13	3.81	2.60	3.08	1.03	-12.32%
Italy	5.80	3.67	3.77	3.77	3.17	3.19	3.21	3.60	2.82	0.95	-8.61%
Malaysia	0.55	0.24	0.13	0.08	0.18	0.47	1.98	2.42	2.07	0.69	17.95%
Austria	3.24	3.67	3.16	2.84	2.07	2.30	2.01	2.03	1.55	0.52	-8.82%
ROW	47.86	75.58	46.41	30.67	40.75	17.11	20.43	15.88	11.42	3.83	-16.40%
World	369.07	420.49	337.18	361.95	346.03	296.02	336.29	261.18	297.98	100.00	-2.64%

Figure (c) - Graphical representation of top exporters of 520522 (Market share volume wise)

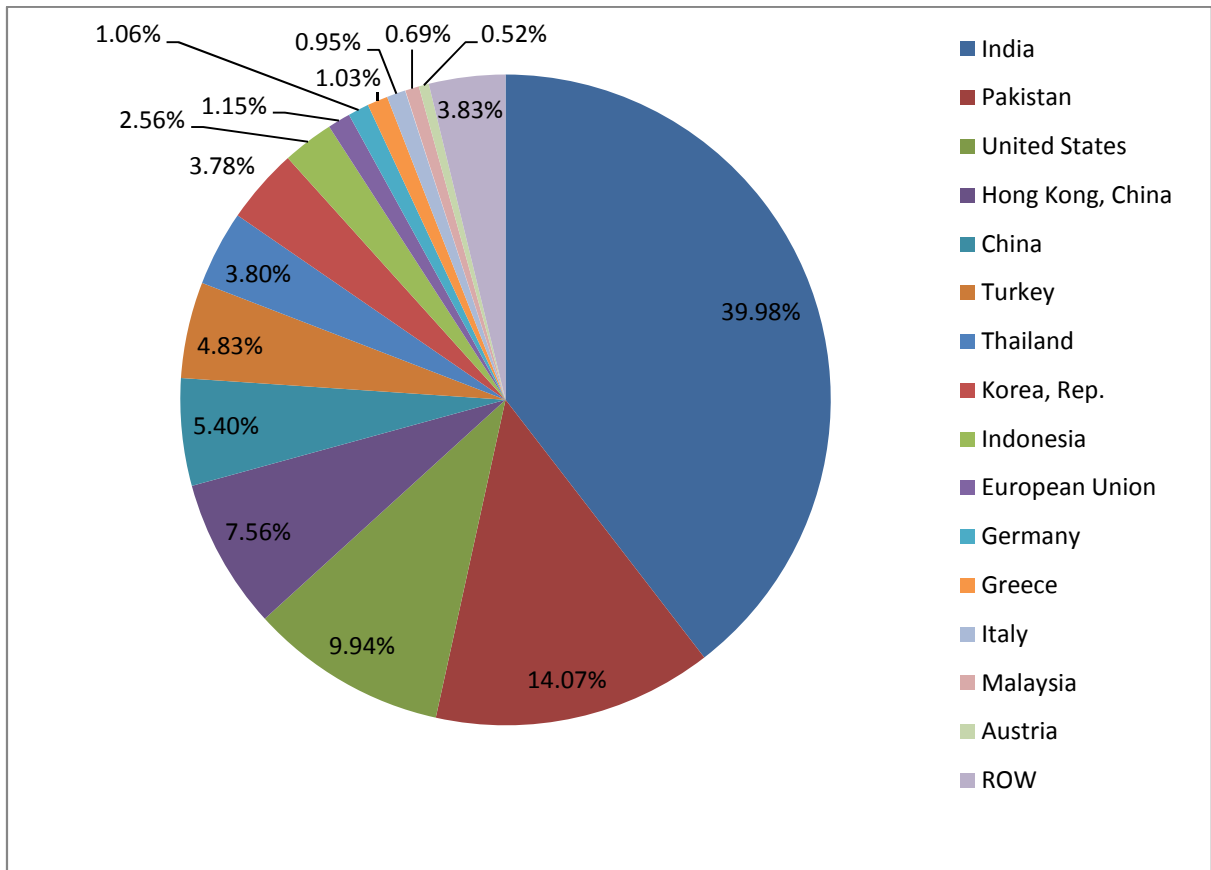
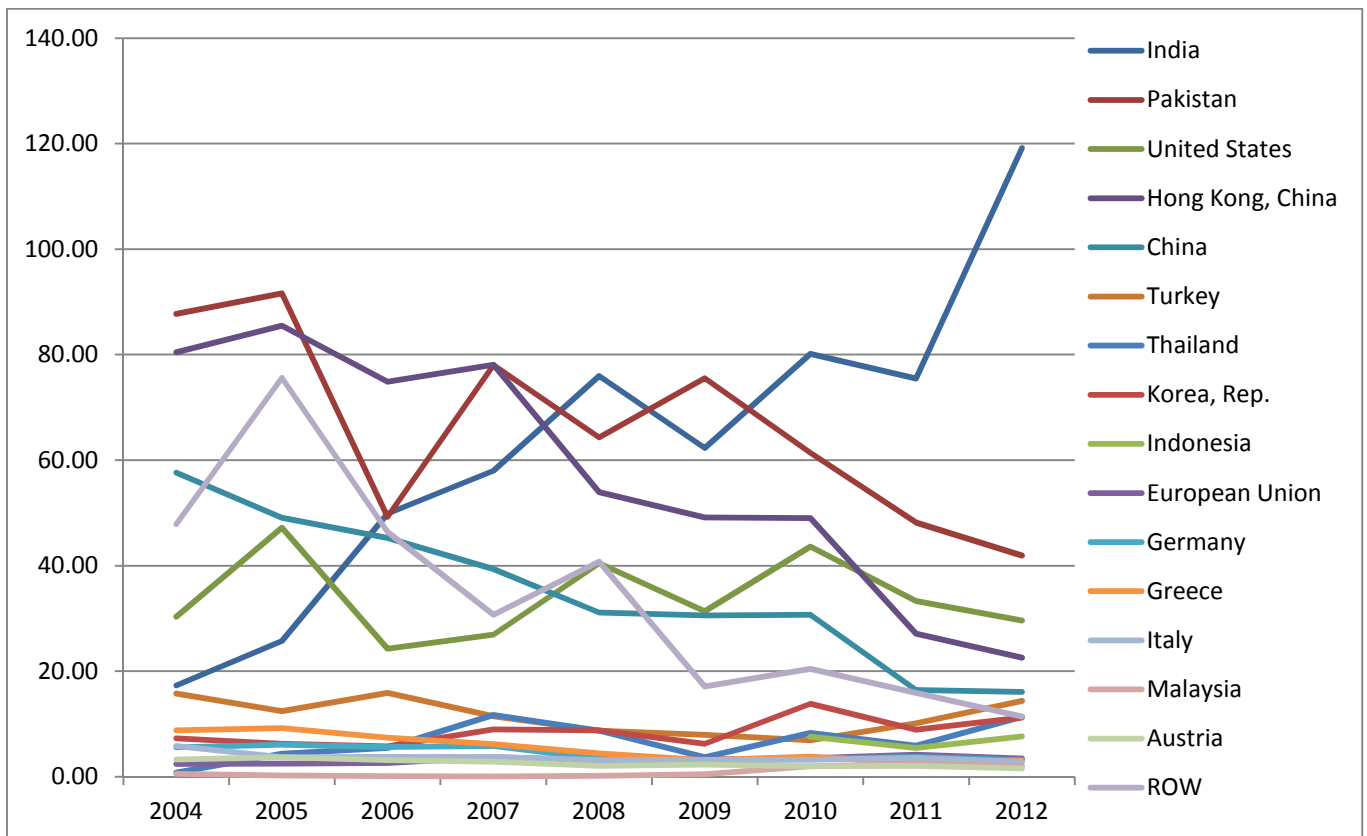


Figure (d) – Performance of top exporters of 520522 from 2004-2012 (Volume wise)



VI. Top Importers (Value wise in Mn USD)

Table 1.3- Top importers of 520522 (Value wise in Mn Kg)

Top Importers	2004	2005	2006	2007	2008	2009	2010	2011	2012	% Share	CAGR
China	766.09	683.12	469.19	416.68	313.20	357.24	391.57	336.80	341.55	34.71	-9.60%
European Union	140.79	112.90	139.20	166.65	136.00	112.61	158.42	186.84	131.71	13.39	-0.83%
Egypt, Arab Rep.	0.00	0.00	0.00	0.00	126.26	102.80	85.46	104.98	91.28	9.28	-7.79%
Hong Kong	247.03	249.80	268.03	252.39	153.28	127.18	198.82	124.39	87.22	8.86	-12.20%
Italy	50.08	40.50	50.51	75.83	51.86	39.27	54.98	66.63	47.14	4.79	-0.75%
Korea, Rep.	73.33	46.22	65.79	46.15	51.44	53.85	73.26	80.84	37.80	3.84	-7.95%
Portugal	53.62	43.71	44.26	44.05	37.84	31.18	51.06	36.53	27.53	2.80	-7.99%
Spain	20.76	15.18	17.69	20.72	17.09	17.96	15.71	26.16	25.17	2.56	2.43%
Poland	21.85	17.76	20.91	22.70	21.16	17.61	21.17	22.92	21.36	2.17	-0.28%
Peru	2.32	5.54	6.01	10.69	17.17	8.86	14.14	14.64	21.13	2.15	31.77%
Colombia	11.93	9.47	15.32	14.37	14.33	10.15	20.98	20.49	19.62	1.99	6.42%
Germany	21.51	21.11	21.35	24.65	25.14	16.08	20.14	28.96	19.31	1.96	-1.34%
Guatemala	0.36	6.30	0.28	10.59	8.84	5.45	5.81	32.75	18.45	1.88	63.45%
Sri Lanka	1.86	1.70	1.20	1.62	2.81	0.93	4.23	16.67	15.67	1.59	30.56%
Russian Federation	3.51	3.10	0.54	1.87	5.54	9.31	13.30	15.15	15.43	1.57	20.34%
ROW	349.50	300.17	335.38	368.49	289.48	205.26	297.59	333.98	195.33	19.85	-7.01%
World	1623.74	1443.68	1316.46	1310.82	1135.41	1003.13	1268.23	1261.88	984.00	100.00	-6.07%

Figure (e) - Graphical representation of top importers of 520522 (Market share value wise)

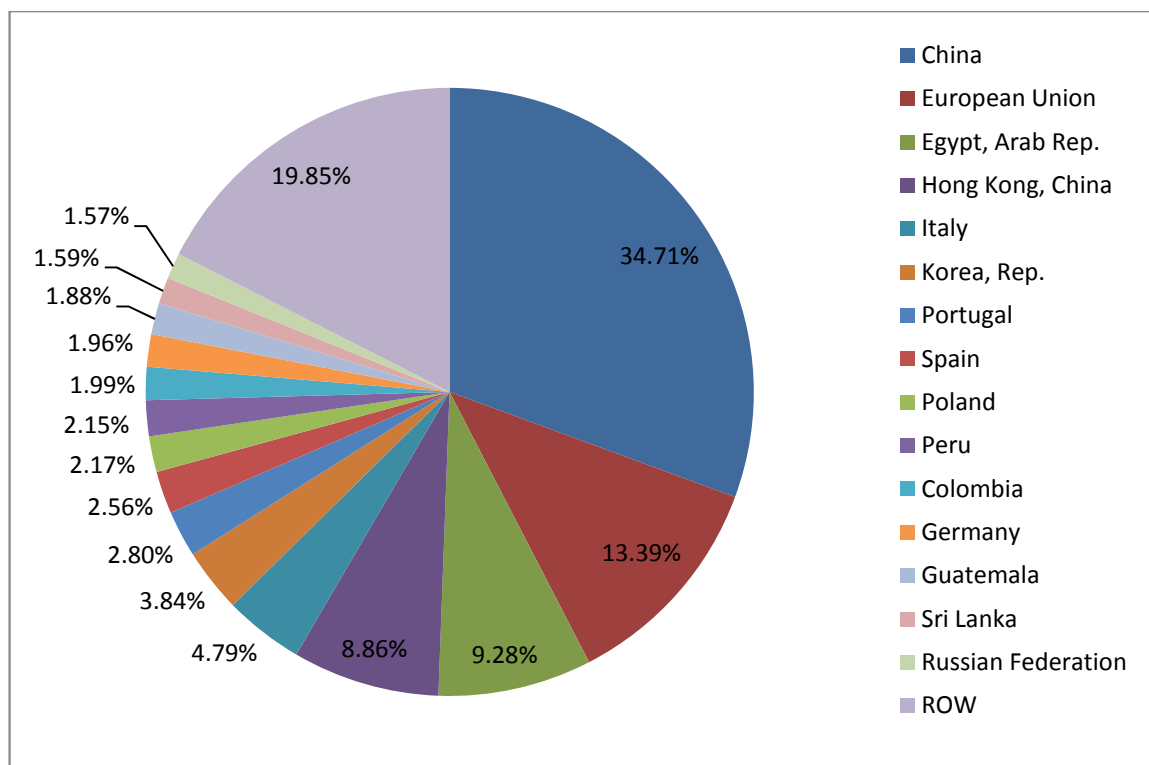
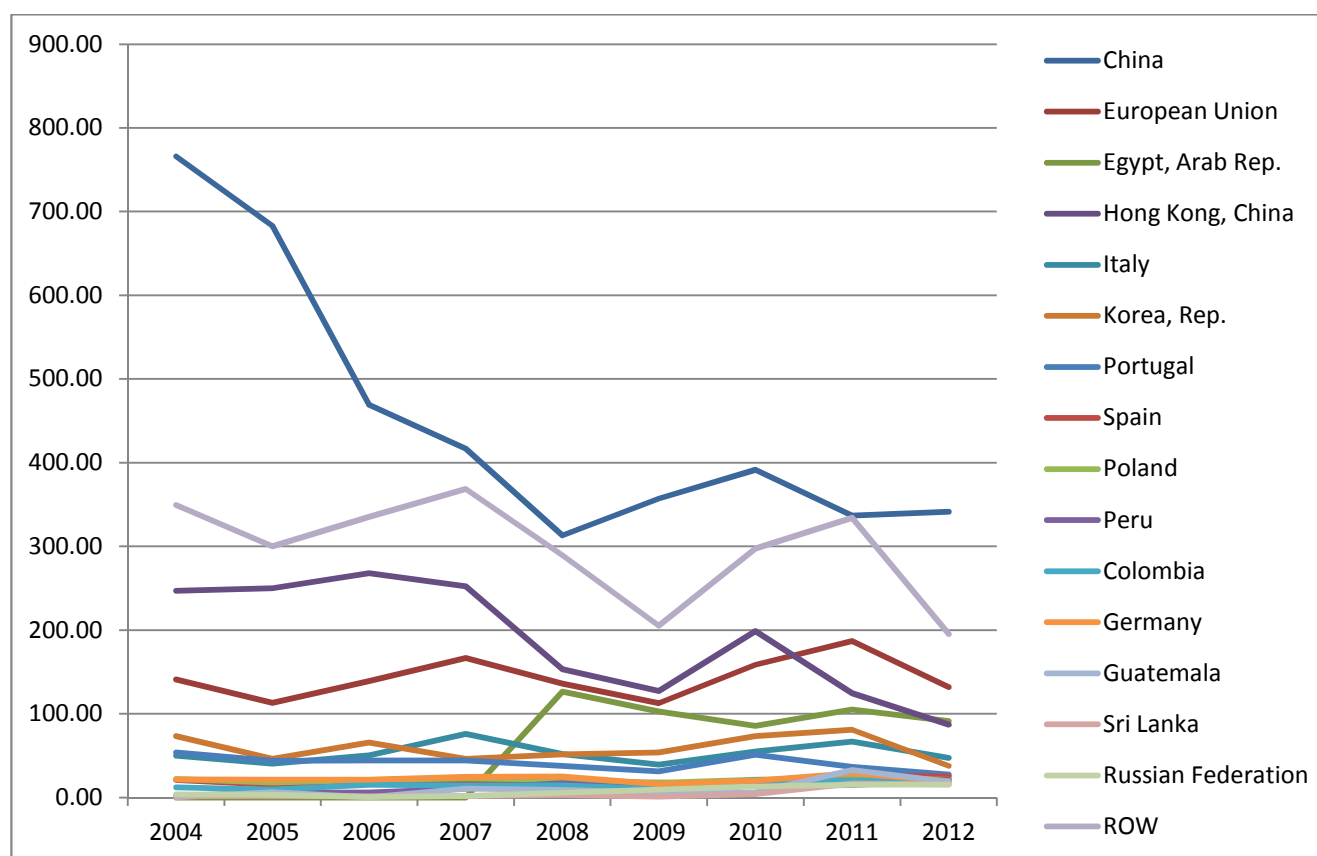


Figure (f) – Performance of top exporters of 520522 from 2004-2012 (Value wise)



Top Importers (Volume Wise in Mn Kg)

Table 1.4 - Top importers of 520522 (Volume wise in Mn Kg)

Top Importers	2004	2005	2006	2007	2008	2009	2010	2011	2012	% Share	CAGR
China	336.59	298.38	219.02	203.38	145.12	158.38	143.46	92.83	104.86	39.04%	-13.57%
European Union	44.14	40.15	47.89	55.30	42.87	39.07	43.10	33.52	31.58	11.76%	-4.10%
Hong Kong, China	87.24	99.58	96.91	91.62	53.01	47.27	55.67	26.64	22.35	8.32%	-15.65%
Mauritius	12.46	4.05	8.25	6.40	3.29	3.27	1.66	2.65	18.44	6.86%	5.02%
Egypt, Arab Rep.	0.00	0.00	0.00	0.00	42.23	43.77	50.16	56.85	15.96	5.94%	-21.59%
Italy	14.72	13.12	16.51	21.02	13.99	11.67	13.16	10.46	9.87	3.68%	-4.87%
Korea, Rep.	27.31	20.97	27.02	17.64	17.59	20.58	20.22	15.78	9.69	3.61%	-12.15%
Portugal	17.37	16.30	15.80	15.56	12.31	11.61	14.61	7.32	7.36	2.74%	-10.18%
Peru	0.64	2.09	2.73	4.55	6.62	3.78	4.73	3.02	5.67	2.11%	31.44%
Colombia	3.92	3.32	5.34	5.02	4.49	4.41	7.00	4.42	5.62	2.09%	4.60%
Poland	6.74	6.53	7.21	7.38	6.63	6.47	5.88	4.35	5.48	2.04%	-2.56%
Spain	6.45	5.38	6.03	6.74	4.82	4.47	3.96	4.53	5.45	2.03%	-2.08%
Germany	5.94	5.79	5.86	7.30	7.53	5.07	6.16	5.45	4.91	1.83%	-2.35%
Turkey	5.86	8.47	6.55	15.88	10.19	8.74	11.66	6.78	3.99	1.48%	-4.70%
Guatemala	0.08	1.75	0.13	2.63	2.15	1.48	1.47	5.83	3.84	1.43%	62.16%
ROW	86.94	83.23	90.20	92.94	74.90	55.24	71.07	58.68	45.12	16.80%	-7.87%
World	612.24	568.96	507.55	498.05	404.86	386.20	410.88	305.58	268.60	100.00%	-9.79%

Figure (g) - Graphical representation of top importers of 520522 (Market share volume wise)

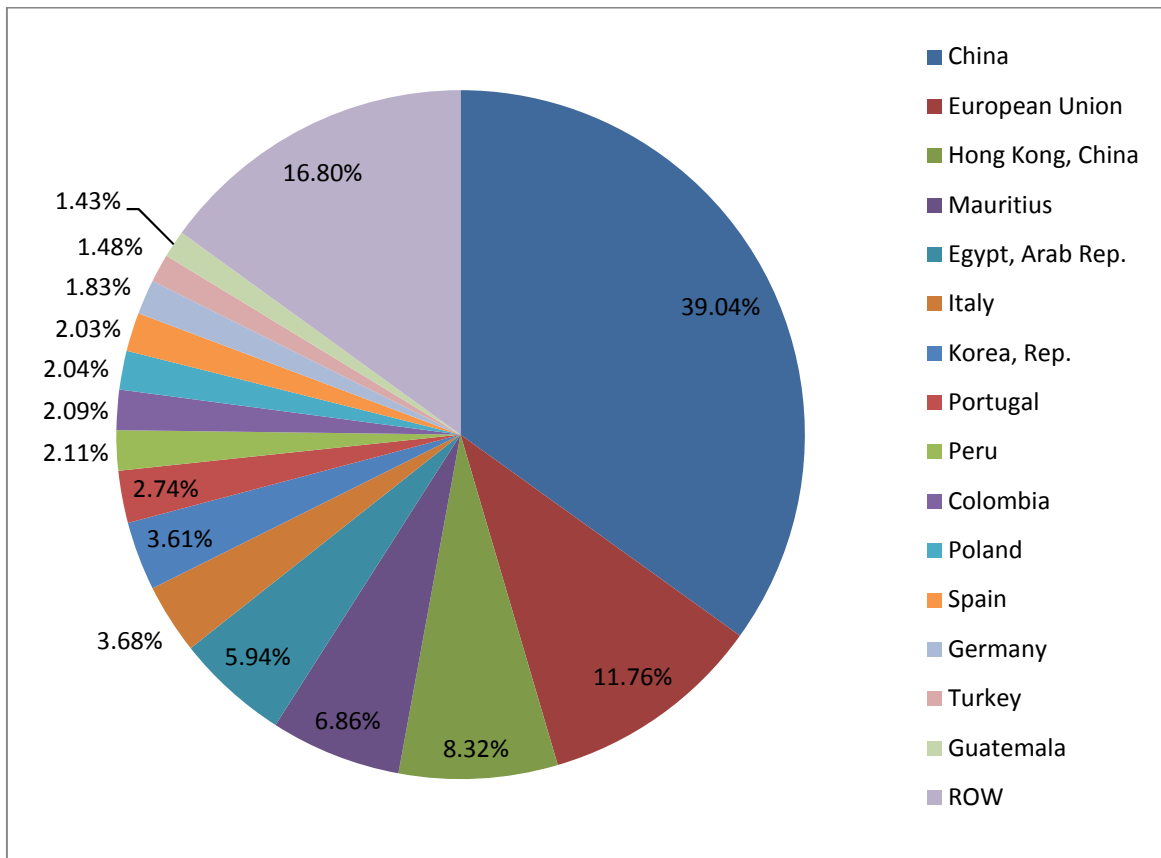
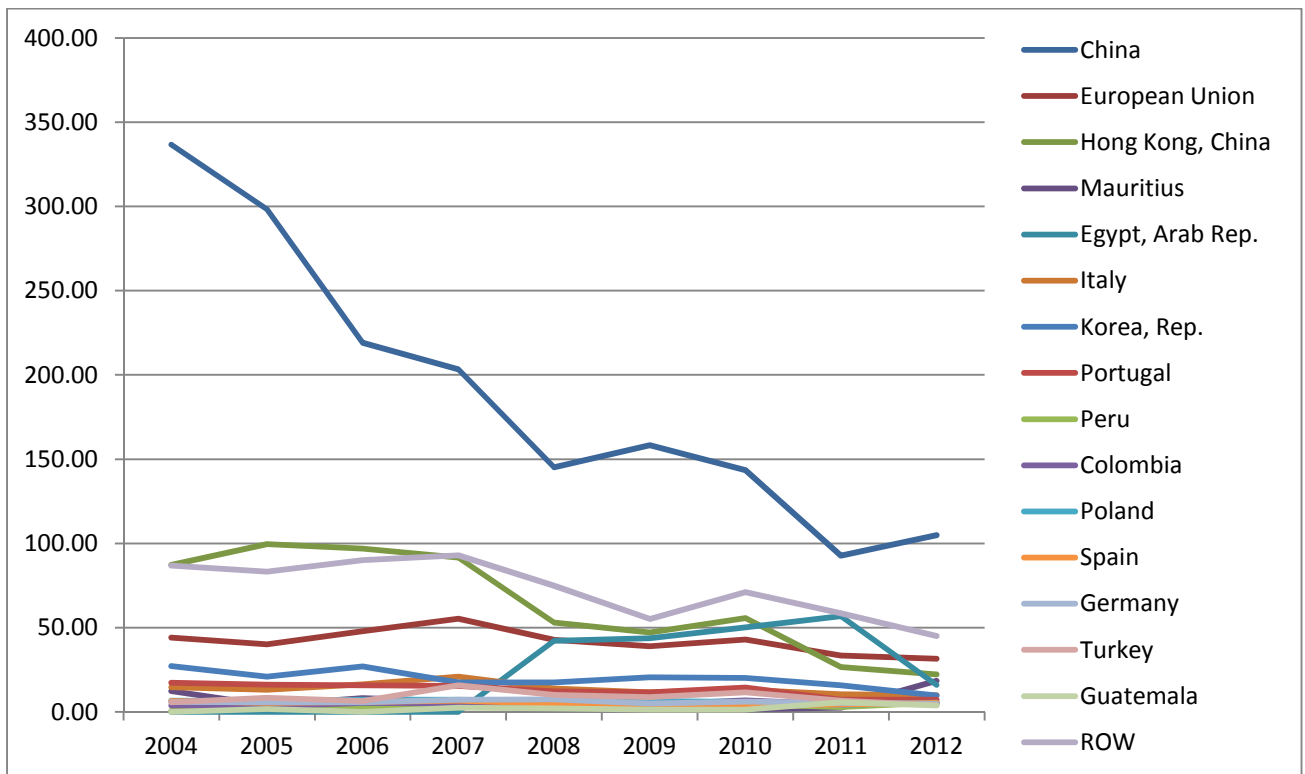


Figure (h) – Performance of top exporters of 520522 from 2004-2012 (Volume wise)



VII. Importance in Cotton Yarn basket and Global competitiveness

Table 1.5-Analysis for Importance of 520522 in Cotton Yarn Basket of top Importers: 2012 (Value in Mn USD)

Top 10 CY importers	Total CY Import Value (Mn USD)	Total Import of 520522 (Mn USD)	% Share of 520522 in Product Basket	Average Imports (2010-2012)	CAGR (2004-2012) for World Import of 520522
China	4952.82	341.55	6.90%	356.64	-9.60%
Hong Kong	1511.08	87.22	5.77%	136.81	-12.20%
European Union	1116.23	131.71	11.80%	158.99	-0.83%
Korea Republic	584.53	37.80	6.47%	63.97	-7.95%
Turkey	344.73	14.52	4.21%	29.23	-2.64%
Russia	288.75	15.43	5.34%	14.63	20.34%
Japan	271.39	13.63	5.02%	16.27	4.24%
Germany	248.67	19.31	7.77%	22.80	-1.34%
Egypt	238.27	91.28	38.31%	93.90	-6.28%
Guatemala	212.84	18.45	8.67%	19.01	63.45%
Portugal	211.41	27.53	13.02%	38.37	-7.99%
US	164.79	7.01	4.26%	9.62	-19.37%
El Salvador	151.82	2.46	1.62%	2.52	54.94%
Mexico	148.85	4.94	3.32%	6.31	-2.13%
Sri Lanka	127.44	15.67	12.29%	12.19	30.56%
Malaysia	126.62	3.38	2.67%	4.05	-8.82%
Spain	114.01	25.17	22.07%	22.35	2.43%
Czech Republic	112.05	4.10	3.66%	4.62	-4.03%
France	100.25	9.31	9.29%	10.74	-10.86%
World Total	11970.47	984.00	8.22%	1171.37	-6.07%

Table 1.6-Market Share (%) of top exporters in top Import markets :2012

Top Importers	Total Import Mn USD	Top Exporters						
		India	Pakistan	United States	Indonesia	China	Turkey	Korea Rep.
China	341.55	26.51	36.32	0.07	5.93	13.29		9.31
Hong Kong	87.22	15.26	36.81		3.80	34.75		6.63
European Union	131.71	39.73	11.33		0.95	0.25	37.70	0.51
Korea Republic	37.8	57.68	10.20		0.16	31.28		
Turkey	14.52	20.09	15.35		0.14	2.63		
Russian Federation	15.43	8.74	2.76			1.21	17.54	
Japan	13.63	18.33	12.32	1.88	30.23	9.46	0.04	9.70
Germany	19.31	43.00	3.01		1.65	0.57	17.11	1.01
Egypt	91.28	79.59	2.41	0.16	0.69	4.30	6.65	0.25
Guatemala	18.45	12.04	1.35	20.69		1.33		3.27
Portugal	27.53	62.79	20.38		2.04		1.01	1.71
United States	7.01	11.62	13.35		8.35	4.39		16.16
El Salvador	2.46		1.20	70.84				
Mexico	4.94	6.54	2.39	67.38				21.41
Sri Lanka	15.67	75.59	3.54		8.84	3.46		0.35
Malaysia	3.38	32.22	10.76		1.87	3.10		14.54
Spain	25.17	25.17	17.36		0.41		11.99	
Czech Republic	4.1	25.42	1.63		2.07		14.94	
France	9.31	3.72	2.21				9.75	

Table 1.7- UVR of Top Exporters in top import destinations: 2012

UVR	India	Pakistan	United States	Indonesia	China	Turkey	Korea Rep.
China	2.99	3.21		3.36			3.63
Hong Kong	3.24	3.28		3.63	4.32		3.57
European Union							
Korea Republic	3.14	3.71		3.44	5.86		
Turkey	3.3	3.97			4.7		
Russian Federation	2.55	5.32			4.35	5.12	
Japan	4.19	3.62		4.24	6.41	10.12	3.55
Germany	3.33	4.19			5.79	4.35	
Egypt	3.12	3.58	5.47	2.81	5.84	3.48	3.66
Guatemala	3.05	3.64	6.8		5.87		4.05
Portugal	3.12	4.01				3.74	3.36
United States	2.81	4.11		5.29	8.17		3.61
El Salvador	3.62		4.13				
Mexico	3.24		4.41		7.9		5.16
Sri Lanka	3.69	5.16		4.01	4.72		3.58
Malaysia	3.01	3.43			5.48		3.63
Spain	3.78	4.12		3.72	10.43	4.88	
Czech Republic	3.95	5.92				4.26	
France		2.15				4.43	

Table 1.8- Top exporters CAGR in Top importers market (2004-2012)

Top Importer	Top Exporters													
	India	Pakistan	United States	Hong Kong	China	Turkey	Korea, Rep.	Indonesia	Thailand	European Union	Italy	Germany	Greece	Austria
China	58.41%	13.71%	-100.00%	-11.85%	-	-	17.88%	89.52%	65.33%	17.63%	17.19%	-	-	-
Hong Kong	21.08%	-11.98%	-	-	13.98%	-	-3.99%	23.28%	-4.77%	-7.67%	-9.28%	-	-	-
Mauritius	12.17%	-7.96%	-	-100.00%	18.05%	-	-24.53%	-65.06%	-	-	-	-	-	-
Egypt, Arab Rep.	30.96%	4.19%	-	-100.00%	13.85%	21.80%	-0.49%	7.88%	-	-22.91%	-	-	-100.00%	-
Italy	25.73%	-14.55%	-	-100.00%	-1.73%	6.27%	-	-100.00%	-100.00%	-	-	-6.61%	-12.33%	-
Korea, Rep.	4.24%	-26.24%	-	-2.68%	6.78%	-	-	-73.96%	29.35%	-10.97%	-7.32%	-	-	-59.26%
Portugal	65.97%	-7.66%	-	-	-	-2.90%	-	-100.00%	-100.00%	-	-11.83%	0.79%	-37.56%	-
Peru	75.01%	100.00%	-31.36%	-	-	-	-	-	-	-	-	-	-	-40.63%
Colombia	48.74%	-11.24%	-100.00%	-	-	-100.00%	-	-73.23%	-	-100.00%	-	-	-	-
Poland	41.61%	-26.89%	-	-	-	7.15%	-	-100.00%	-	-	0.62%	-0.90%	-67.52%	-
Spain	50.43%	-15.48%	-	-	-	30.79%	-	-49.92%	-100.00%	-	3.69%	-24.41%	-1.99%	-2.90%
Germany	59.76%	-8.69%	-	-	23.39%	15.28%	-	-	-100.00%	-	-22.23%	-	-3.26%	-100.00%
Turkey	6.20%	7.40%	-	-	18.87%	-	-	-100.00%	0.81%	-15.54%	-14.22%	27.53%	-44.13%	6.65%
Guatemala	28.34%	-9.85%	-35.97%	-	35.70%	-	-5.29%	-	-	-	-	-	-	-

VIII. Target Countries for export

Table 1.11- Target countries for export in the world (Value in Mn USD)										
Importing Countries	2004	2005	2006	2007	2008	2009	2010	2011	2012	CAGR
Spain	20.76	15.18	17.69	20.72	17.09	17.96	15.71	26.16	25.17	2.43%
Peru	2.32	5.54	6.01	10.69	17.17	8.86	14.14	14.64	21.13	31.77%
Colombia	11.93	9.47	15.32	14.37	14.33	10.15	20.98	20.49	19.62	6.42%
Guatemala	0.36	6.30	0.28	10.59	8.84	5.45	5.81	32.75	18.45	63.45%
Sri Lanka	1.86	1.70	1.20	1.62	2.81	0.93	4.23	16.67	15.67	30.56%
Russian Federation	3.51	3.10	0.54	1.87	5.54	9.31	13.30	15.15	15.43	20.34%
Japan	9.78	7.93	7.28	9.32	8.95	6.96	12.91	22.28	13.63	4.24%
Belarus	2.93	3.96	3.35	6.26	7.68	6.78	9.27	12.87	10.25	16.95%
Thailand	0.72	1.00	4.08	2.89	3.50	3.32	3.25	9.09	6.71	32.12%
Indonesia	0.00	0.00	0.00	0.00	0.00	0.00	6.03	9.21	6.49	3.75%
Croatia	4.89	5.18	6.59	7.62	8.08	5.91	6.30	9.03	6.04	2.68%
Pakistan	0.00	0.37	0.01	0.00	0.21	0.11	1.84	1.08	5.44	172.85%
Ukraine	0.00	0.00	0.00	0.00	2.44	2.13	4.24	5.95	5.14	20.53%
Brazil	1.85	3.27	3.32	5.65	12.92	7.40	9.38	8.07	5.07	13.47%
Bulgaria	3.48	6.27	8.18	7.55	6.46	5.33	4.75	5.43	4.31	2.73%
Macedonia, FYR	0.18	0.31	0.13	0.13	0.98	4.53	4.46	5.13	3.28	44.09%
Chile	1.50	0.85	1.09	1.00	1.85	1.09	1.69	2.60	2.53	6.74%
El Salvador	0.07	0.42	1.99	2.62	0.91	0.13	1.98	3.13	2.46	54.94%
Yugoslavia	0.00	1.42	1.09	1.30	1.95	1.29	1.55	3.21	2.35	7.43%
Ecuador	0.32	0.38	0.40	0.75	0.49	0.93	1.00	1.86	2.20	27.12%
Kazakhstan	0.03	0.13	0.02	0.10	0.15	0.09	0.00	1.17	2.03	66.39%
Netherlands	1.02	0.64	0.81	0.59	1.20	0.67	0.79	1.41	1.40	4.13%
Costa Rica	0.06	0.00	0.63	0.25	0.04	0.09	0.54	0.03	0.86	39.76%

IX. Findings

- 520522 belong to the combed cotton yarn segment having cotton content more than 85% and a count of 8.27-25.41.
- The total export value of this product in the world is 1034.58 Mn USD (2012) and the total import value is 984 Mn USD (2012).
- Major exporters of this product are India, Pakistan, Indonesia, United States, Thailand and Turkey. Major importers include China, Hong Kong, Egypt, Italy, Korea etc.
- The target market for chosen on the basis of their volume of import and growth rate are: Spain, Peru, Columbia, Guatemala, Sri Lanka, Russian Federation, Japan and Belarus.