

January 2009



[YNFX – YARN EXPORTWATCH REPORT]

A Monthly Digest on Indian Spun Yarn Exports

YnFx - Yarn ExportWatch Report covers monthly analysis of the Indian spun yarn exports based on data from four ports. It covers spun yarns made of cotton, viscose, polyester, acrylic, and their blends. Volumes, value and unit price realization are the three major indicators analysed by counts and destinations.

NOTES TO REPORT

Coverage

The report is based on data available four major ports of India namely **Tuticorin, Chennai, JNPT and Mumbai Sea ports**. These ports account for 75% of all spun yarn exported from India.

Notes to Report

While data on all spun yarns are covered in this report, detailed analysis is presented for yarns made of **Cotton, Viscose, Polyester, Polyester/Cotton and Polyester/Viscose** blended yarns only.

All **volume units** are expressed in '000 kgs equivalent to One Metric Tonne

All **value units** are expressed in US\$.

Unit Realisation weighted average of FOB rate expressed in US\$/kg. It may include commission and interest element depending on the terms and conditions of the transaction.

Elite Group is constituted on the basis of value of export earnings in a month. In case of cotton yarn any individual count/country with export worth US\$1 million or more forms the elite group. Similarly, the value is US\$0.10 million or US\$1 lakh for spun yarn made of viscose, polyester, Polyester/Cotton and Polyester/Viscose blended yarns.

Price Curve Chart plots the FOB price range on the X-axis and volume of yarn exported on the Y-axis for the two comparable months under review.

List of Importers/Exporters covered in this report excludes consignment sent to banks and financial Institutions. However, they are included as importers for all other purposes.

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EXECUTIVE SUMMARY

India's total textile exports in 2008-09 is expected to remain flat as compared with the previous year, as a falling rupee has offset losses in the first six months. According to Mr. J.N. Singh, Joint Secretary in the Ministry of Textiles exports will be more or less in line with last year's US\$22-23 billion.

Looking forward, India's overall exports are likely to stabilize by first quarter of 2009-10. According to Mr. G K Pillai, trade and commerce secretary, the textiles sector was stabilizing as many exporters have reportedly got orders for 60-90 days. This is corroborated by Mr. D.K. Nair, secretary of the CITI that the figures from textile mills suggest that there is a decline in the rate of contraction, which means the declining trend seems to be tapering off although there are no numbers to substantiate the recovery.

Data available until January 2009 suggest that the decline in export of spun yarns has deepened further. During the month, exports from four major ports (accounting for over 75% of total) declined 42% in terms of volume and 49% in terms of value in comparison with the corresponding month a year ago. About 31 million kgs of spun yarn was exported valued at US\$85 million. In January 2008, 53 million kgs were exported fetching US\$167 million. February and March would not be miraculous apart from that the Re. depreciated a bit further. Global economic crisis still persists with no evidence of immediate revival.

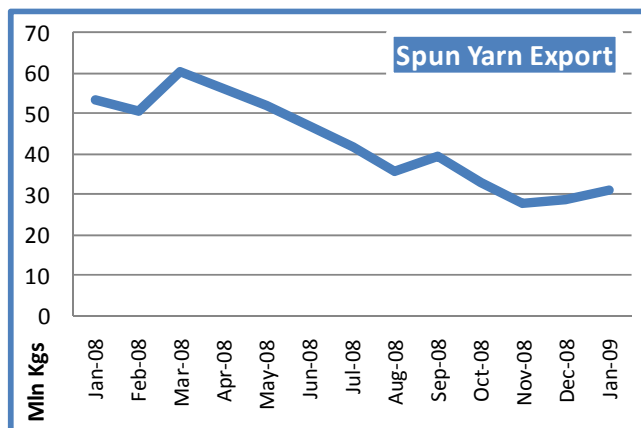
During January 2009, all excepting cotton/viscose and acrylic/cotton yarn, all yarns recorded significant declines from their last year's numbers. Major decline was seen in cotton yarn exports which accounts for almost 75% of all yarns. The overall unit price realization averaged US\$ 2.75/kg as against US\$3.12/kg last year, implying a fall of 12%. The Indian Re has depreciated by almost 20% during the 12-month period.

Among major destinations – accounting for 50% of India's exports, only Portugal recorded positive increases. The top importers of spun yarns were Bangladesh followed by Italy and Egypt. Exports to these three destination declined by almost one-third. Destinations which showed high growth potential were Iran, Tunisia and Romania each accounting for over US\$1 million worth of exports a month. In similar comparison, the losers were Sri Lanka, Belgium, Brazil and Japan – each accounting for over US\$2 million worth of exports a month.

EXPORT TRENDS IN JANUARY 2009

EARNINGS DECLINE

The decline in spun yarn exports deepened further in January 2009 compared to December. During the month exports from four major ports (accounting for over 75% of total) declined 42% in terms of volume and 49% in terms of value in comparison with the corresponding month a year ago. The



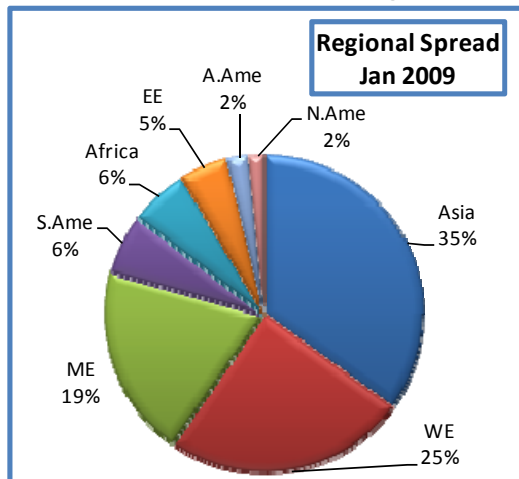
volume exports were at 31 million kgs valued at US\$85 million. The corresponding numbers a year ago were 53.5 million kgs and US\$167 million. Cotton yarn which accounts for over 70% of all spun yarns exports witnessed a significant fall of 42% in terms of volume and 48% in value. 100% manmade fibre spun yarns, accounting for 15% of yarn exports, recorded 29% drop in volume and 41% decline in value. Blended yarns exports were almost one-third of last year both in value and volume.

Overall unit realization averaged US\$2.75 per kg of spun yarn exported from India in January 2009 as against US\$3.12 per kg in January 2008. .

TABLE 1. SPUN YARN EXPORTS - BY FIBRE TYPE						
	'000 Kgs		Mln US\$		Unit Realisation (\$/kg)	
	Jan-08	Jan-09	Jan-08	Jan-09	Jan-08	Jan-09
Natural Fibre Yarn	40,662	23,741	126.18	65.15	3.10	2.74
Cotton	40,662	23,741	126.18	65.15	3.10	2.74
Manmade Fibre Yarn	6,608	4,690	22.10	12.96	3.34	2.76
Viscose	3,446	2,544	13.65	7.32	3.96	2.88
Polyester	2,719	1,025	7.46	2.84	2.74	2.77
Acrylic	217	138	0.66	0.35	3.06	2.56
MMF unspecified	226	982	0.33	2.45	1.45	2.49
Blended Yarn	6,138	2,610	18.32	7.28	2.98	2.79
Poly/cotton	2,695	1,352	6.97	2.88	2.59	2.13
Poly/viscose	2,874	806	9.04	2.49	3.15	3.09
Poly/wool	61	87	0.49	0.71	7.90	8.14
Acrylic/cotton	113	172	0.40	0.59	3.51	3.41
Cotton/viscose	46	100	0.19	0.35	4.03	3.47
Poly/acrylic	349	92	1.23	0.26	3.53	2.84
Acrylic/viscose	33		0.14			
Not Specified	77		0.20		2.61	
Grand Total	53,517	31,040	166.93	85.39	3.12	2.75

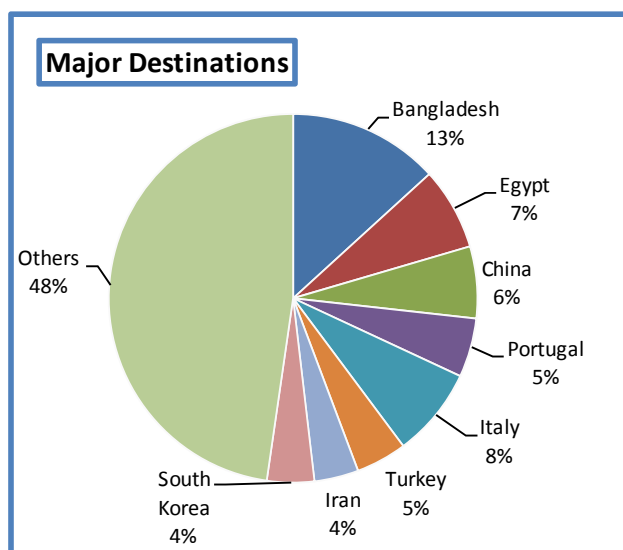
DESTINATIONS – LOST AND FOUND

During January 2009, spun yarn was exported to 70 countries across the world as against 79 last year. Asian countries accounted for 35% of export value, while West Europe accounted for another 24%. The third largest region was Middle East where 19% of spun yarn was exported. South American countries bought 6% while the rest 16% was exported to countries in Africa, East Europe, CIS, North America and Oceania. Last year, Middle East and South American countries accounted for a higher share (24% and 11% respectively). This year the increase in share was in Asia, West Europe, East Europe and Africa. Thus, the number of countries have declined 10% and volume exports declined significantly by 42%.



MARKET CONCENTRATION

Only 24 out the 70 countries formed the elite¹ group of destination in January 2009. The same number was 19 in January 2008. Of these 24 countries, Portugal, Tunisia and Romania entered the list of elite countries this year, while Taiwan, USA, Mauritius, Argentina, Malaysia and Philippines which were elite destinations last year saw export worth less than US\$ 1 million this year. Nearly half of Indian export was accounted by eight countries namely Bangladesh, Egypt,



China, Portugal, Italy, Turkey, Iran and South Korea Russia (In order of export value). Last year, the proportion was accounted by only seven countries namely Turkey, Bangladesh, Brazil, Egypt, Italy, South Korea and Peru. This year, the highest export value for individual country was US\$11 million (Bangladesh) almost half of US\$22 million (Turkey) in January 2008.

¹ See page 2 for definition

TABLE 2. SPUN YARN EXPORTS - MAJOR DESTINATION (ABOVE US\$ 1 MLN.)							
	'000 Kgs		Mln US\$		% Share in Total Jan 09		Value % YoY
	Jan-08	Jan-09	Jan-08	Jan-09	Volume	Value	
Bangladesh	5,795	4,479	16.83	11.31	14.43	13.24	-32.84
Italy	2,027	1,670	9.11	6.71	5.38	7.86	-26.34
Egypt	3,393	2,693	9.62	6.17	8.68	7.22	-35.90
China	2,061	2,192	5.71	5.38	7.06	6.30	-5.84
Portugal	1,416	1,689	4.07	4.42	5.44	5.18	8.82
Germany	1,691	1,191	5.70	3.92	3.84	4.59	-31.16
Turkey	7,181	1,381	22.42	3.82	4.45	4.48	-82.94
South Korea	2,851	1,261	8.77	3.54	4.06	4.14	-59.65
Iran	796	1,311	2.71	3.31	4.22	3.87	22.02
Sri Lanka	1,716	1,081	5.35	3.18	3.48	3.72	-40.57
Belgium	1,238	899	4.31	2.86	2.90	3.36	-33.49
Brazil	3,572	892	10.20	2.44	2.87	2.86	-76.03
Japan	521	491	3.23	2.38	1.58	2.79	-26.25
Peru	2,892	744	7.96	1.86	2.40	2.18	-76.60
Colombia	1,452	802	3.65	1.77	2.58	2.07	-51.42
Spain	1,167	619	3.33	1.71	2.00	2.00	-48.83
Tunisia	464	591	1.32	1.54	1.90	1.80	16.29
Romania	167	292	0.99	1.43	0.94	1.68	44.30
United Arab Emirates	597	394	2.10	1.29	1.27	1.51	-38.49
Morocco	1,104	538	3.21	1.23	1.73	1.45	-61.55
Hong Kong	435	474	1.33	1.18	1.53	1.39	-10.98
Russia	951	464	2.42	1.09	1.49	1.28	-54.87
Israel	851	500	1.94	1.07	1.61	1.26	-44.53
Poland	419	451	1.99	1.07	1.45	1.25	-46.39
Taiwan	620	205	3.27	0.67	0.66	0.78	-79.63
USA	1,007	346	3.19	0.99	1.11	1.16	-68.97
Mauritius	581	178	1.95	0.51	0.57	0.59	-73.91
Argentina	657	283	1.77	0.71	0.91	0.83	-60.24
Malaysia	446	49	1.30	0.14	0.16	0.17	-88.87
Philippines	354	241	1.02	0.51	0.77	0.59	-50.51
	Lost Elites		Major losers		Major gainers		

COUNTS IN DEMAND- UPS AND DOWNS

In January 2009, 12 counts formed the elite group fetching over US\$ 1 million of export earnings and accounted for nearly 60% of total volume exports (See table below). Their cumulative value was US\$48 million and volumes at 18.8 million kgs. As against this, 23 count types fetched over US\$1 million each with total earning at US\$115 million in January 2008. Thus, these major counts itself witnessed sharp decline of 58%, while the overall export decline was lower at 49%. Volume exports of these counts declined 50% while their average realization was down by a significant 17% in January 2009 compared to last year.

TABLE 3. SPUN YARN EXPORTS - MAJOR COUNTS EARNING OVER US\$ 1 MLN.

	'000 Kgs		Mln US\$		Unit Realisation (\$/kg)	
	Jan-08	Jan-09	Jan-08	Jan-09	Jan-08	Jan-09
30/1 Cotton yarn	12,166	6,984	33.25	16.35	2.73	2.34
40/1 Cotton yarn	5,862	3,131	17.75	8.43	3.03	2.69
30/1 Viscose yarn	1,420	1,344	5.56	3.59	3.92	2.67
24/1 Cotton yarn	3,069	1,396	8.63	3.16	2.81	2.26
26/1 Cotton yarn	1,714	1,200	4.64	3.07	2.71	2.56
36/1 Cotton yarn	1,003	902	2.94	2.27	2.93	2.51
20/1 Cotton yarn	3,096	1,058	7.39	2.21	2.39	2.09
32/1 Cotton yarn	653	917	1.79	2.16	2.74	2.35
60/1 Cotton yarn	1,146	528	4.91	2.14	4.28	4.06
50/1 Cotton yarn	1,280	604	4.91	1.96	3.83	3.25
34/1 Cotton yarn	429	592	1.25	1.45	2.91	2.45
80/2 Cotton yarn	358	177	2.61	1.22	7.29	6.91
100/2 Cotton yarn	267	83	2.77	0.85	10.37	10.22
30/1 Poly/viscose	952	139	2.71	0.33	2.84	2.39
60/2 Cotton yarn	378	184	2.05	0.91	5.42	4.92
30/1 Polyester yarn	801	43	1.92	0.09	2.39	2.16
16/1 Cotton yarn	759	373	1.64	0.83	2.16	2.21
30/2 Poly/viscose	444	50	1.53	0.11	3.45	2.22
32/2 Cotton yarn	437	86	1.39	0.22	3.17	2.60
80/1 Cotton yarn	203	108	1.37	0.54	6.73	5.01
40/2 Cotton yarn	361	269	1.24	0.82	3.45	3.06
30/1 Poly/cotton	439	167	1.13	0.39	2.57	2.32
120/2 Cotton yarn	113	20	1.12	0.21	9.94	10.64
	Lost Elites		Major losers		Major gainers	

30/1 cotton was the major yarn earning over US\$16 million in exports. With volumes at 6.9 million kgs and average units realization of US\$2.34 / kg,. Exports of this count declined significantly by around 50%. In January 2008, over 12 million kgs of 30/1 cotton was exported earning over US\$33 million. The next major counts were 40/1 and 30/1 viscose yarn, together earning US\$12 million with volumes at 4..5 million kgs. Their average unit realization was US\$2.69 per kg and US\$2.67per kg respectively.

Thus, these 3 counts together accounted one-third of Indian spun yarn exports and were valued at US\$28 million in January 2009.

TABLE 4. SPUN YARN EXPORTS - COUNTRY WISE BY TYPE OF FIBRE ('000 KGS)

	Cotton	Po-lyest-er	Vis-cose	Acr-yllic	MMF other	PC	PV	PW	AC	CV	PA	Grand Total
Bangladesh	4,035	236	29			93	33			54		4,479
Egypt	2,277	70	68		46	160	46	27				2,693
China	1,969	21				195	0			6		2,192
Portugal	1,597		43			46		3				1,689
Italy	1,112	5	391		21	47	52	1	32	10		1,670
Turkey	619	147	152		69	70	264			9	52	1,381
Iran	1,018		190		65		19				19	1,311
S. Korea	1,242							19				1,261
Germany	844	17	133		104	13	9		72			1,191
Sri Lanka	1,002	51	10	0		3	11			4		1,081
Belgium	329		369		136	21		5	40			899
Brazil	451	1	367		50		24					892
Colombia	771		0			22	9					802
Peru	700		22			23						744
Spain	401	19	77		3	107		12				619
Tunisia	546		45									591
Morocco	344	23	149			22						538
Israel	419	40	9			13	20					500
Japan	417	37					8		29			491
Hong Kong	457		17									474
Russia	464											464
Poland	325		62		3	19	43					451
UAE	356	22			3	8	4					394
USA	181	2	149		1	13						346
Romania	1	52			111		129					292
Argentina	59	10	22	42	50	77	24					283
Kenya					251		22					273
Philippines	104	3				133						241
Taiwan	180	26										205
UK	48		79	17	27	8						180
Mauritius	161	16										178
S Africa	98	40				32						171
S. Arabia		34				117						151
Bulgaria	96	10	21									127
Indonesia	69	12	2								21	105
Czech Rep.	102											102
Syria			51		13		32					96
Australia	88	0	0		7			0				95
Algeria	44					48						92
Croatia	77									8		85
Mexico	29				23	20	0			9		81
Greece	76						3					79
Mada-gaskar	60	14										74
Denmark	47	24										71
Slovenia	69		0									69
Nigeria		65			0		3					68
Djibouti	17			48								66
Slovakia		20	20				22					63
Lithuania	62											62
Cote D'Ivoire	59											59

	Cotton	Po-lyest-er	Vis-cose	Acr-yl-ic	MMF other	PC	PV	PW	AC	CV	PA	Grand Total
Nether-lands	41					9						50
Thailand	34	9	6									49
Malaysia	48	1										49
Jordan			22	7		12	7					48
Venezuela	39											39
Ecuador	9					20						29
Uganda							22					22
Estonia	21				1							22
Dominican Republic	22											22
N. Korea	21											21
Myanmar								21				21
Vietnam	18					3						20
Hungary	20											20
Canada			20									20
Chile			20									20
Pakistan	19											19
Mozambi-que				17								17
Lebanon	9			7								17
Ethiopia	15											15
France							0					0
Total	23,741	1,025	2,544	138	982	1,352	806	87	172	100	92	31,040

UNIT REALISATION SPREAD

TABLE 5. COUNT-WISE PRICE SPREAD (UNIT REALISATION US\$/KG)							
Fibre	Cotton	Polyester	Viscose	Acrylic	PC	PV	CV
Count							
6/1	1.87		3.89				
7/1	3.19						
10/1	1.49			4.09	1.79	1.91	
16/1	2.21		3.11		1.90	2.02	
18/1	2.37	2.06	2.54				
20/1	2.09	2.99	3.95		2.00		2.62
24/1	2.26		2.64		2.21		2.93
26/1	2.56				2.08		2.70
28/1	2.51		2.40				2.35
30/1	2.34	2.16	2.67		2.32	2.39	3.26
32/1	2.35						
34/1	2.45		2.86		2.51		2.65
36/1	2.51	2.20	2.64		2.38	3.21	3.70
40/1	2.69		3.63		2.83	2.47	4.02
50/1	3.25	2.69	5.95			2.91	
60/1	4.06	2.47					
70/1	4.97						
80/1	5.01	3.07					
90/1	8.85						
100/1	4.24						
110/1	8.58						

SPECIALITY YARNS

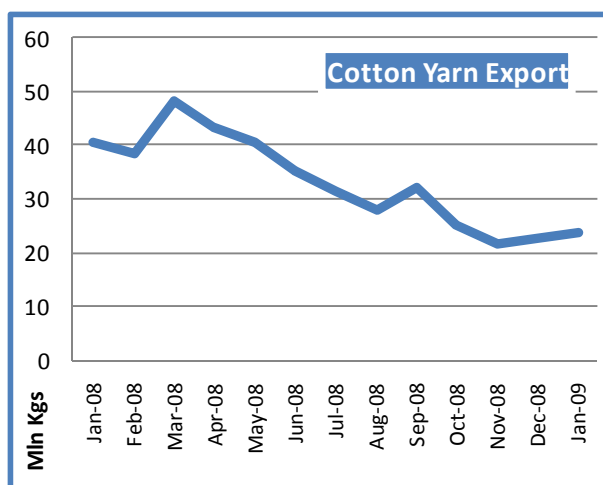
Among specialty yarns, (both cotton and non-cotton) mercerized yarns and synthetic shoddy yarns showed promising increases in January 2009. While 24 thousand kgs of mercerized yarns were exported (as against 9 thousand kgs in January 2008) during the month, 251 thousand kgs of shoddy yarns were exported (as against 185 thousand kgs in January 2008), However, unit price realization declined in case of mercerized yarns (US\$4.63/kg, -29%) while that of shoddy yarns improved (US\$1.08/kg, +3.5%).

TABLE 6. SPECIALITY YARN EXPORTS - BY TYPE						
	'000 Kgs		Mln US\$		Unit Realisation (\$/kg)	
	Jan-08	Jan-09	Jan-08	Jan-09	Jan-08	Jan-09
Compact	771	816	3.60	2.60	4.66	3.19
Gassed	421	393	3.31	2.34	7.85	5.96
Shoddy	185	251	0.19	0.27	1.04	1.08
Mercerised	9	24	0.06	0.11	6.52	4.63
Core spun	228	1	1.66	0.01	7.29	8.05
Total	1,615	1,484	8.82	5.33	5.46	3.59

COTTON YARN

DECLINE DECELERATES

The decline 100% cotton yarn exports accelerated in January 2009 compared to that seen in December 2008. About 23.7 million kgs of yarn was exported from India implying a decline of 42% over last year. In similar comparison, unit value realization declined 12% resulting in a 48% fall in export earnings for the month. Cotton exports were worth US\$65 million in December 2008. However, compared to a month ago both volume and value were higher excepting unit value realisation. Thus, cotton yarn exports for the cumulative period April 2008 to January 2009 was 304 million kgs valued at US\$906 million. Unit value realisation averaged US\$2.97 per kg.



Of the 23.7 million kgs of cotton yarn exports, 19 million kgs were combed yarn, 2.3 million were carded and 500 thousand kgs of open-end yarns. Their respective unit value realization was US\$2.81 per kg, US\$2.29 per kg and US\$1.65 per kg.

Yarn by cotton quality indicates that 220 thousand kgs were of organic cotton with unit value realization of US\$3.33 per kg. Giza cotton yarn totaled 54 thousand kgs exported at unit value realization of US\$5.87 per kg. Pima and Supima cotton yarn export volumes were 38 thousand kgs and 6 thousand kgs respectively.

TABLE 7. TREND IN COTTON YARN EXPORTS

	'000 Kgs	US\$ Mln	Unit Realisation (US\$/Kg)
Jan-08	40,662	126.18	3.10
Feb-08	38,393	112.60	2.93
Mar-08	48,180	144.56	3.00
Apr-08	43,391	129.13	2.98
May-08	40,496	115.75	2.86
Jun-08	35,242	107.54	3.05
Jul-08	31,667	99.55	3.14
Aug-08	28,118	85.90	3.05
Sep-08	32,282	97.54	3.02
Oct-08	25,222	77.36	3.07
Nov-08	21,762	64.08	2.94
Dec-08	22,865	64.39	2.82
Jan-09	23,741	65.15	2.74

TABLE 8. COTTON YARN EXPORT: BY FIBRE TREATMENT AND COLORING CATEGORY

	' 000 kgs		US\$ Mln			' 000 kgs		US\$ Mln	
	Jan-08	Jan-09	Jan-08	Jan-09		Jan-08	Jan-09	Jan-08	Jan-09
Combed	31,368	19,084	102.61	53.68	Grey	40,410	10,781	125.20	31.10
Carded	8,282	2,334	21.24	5.36	Dyed	93	199	0.52	1.01
Open End	825	449	1.54	0.74	Melange	160	29	0.46	0.10
Unspecified	187	1,874	0.79	5.37	Unspecified		12,731		32.93
Total	40,662	23,741	126.18	65.15	Total	40,662	23,741	126.18	65.15

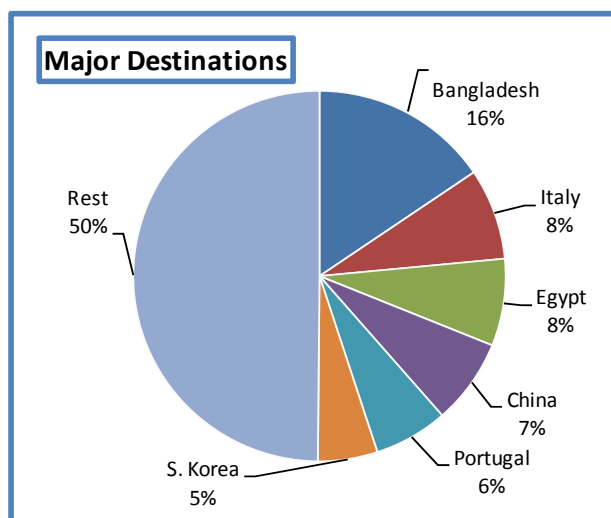
TABLE 9. YARN BY COTTON QUALITY

	' 000 kgs		US\$ Mln	
	Jan-08	Jan-09	Jan-08	Jan-09
Organic	268	220	1.06	0.73
Giza	70	54	0.59	0.32
Pima	185	38	1.35	0.26
Supima	43	6	0.32	0.03
Total				

DESTINATIONS AND MARKET CONCENTRATION

In January 2009, cotton yarn was exported to 58 countries as against 69 last year. About 19 countries in January 2009 formed the elite² group as against 25 in January 2009. Bangladesh, Italy, Egypt, China, Portugal and South Korea accounted for over 50% of Indian cotton yarn exports with volume at 12 million kgs.

In terms of market expansion, Portugal, Iran, Tunisia and Hong Kong recorded significant increase in imports from India with large volumes. While exports to Portugal expanded 16%,



those to Iran increased 254%. Imports by Tunisia increased 40% and Hong Kong by 13%. Although Bangladesh was the largest importer of Indian cotton yarn, its volume declined 28% while value was down 37%, implying a sharp decline of 13% in unit value realisation.

² See page 2 for definition

TABLE 10. COTTON YARN EXPORTS - MAJOR DESTINATION (ABOVE US\$ 1 MLN.)

	' 000 kgs		US\$ Mln		Unit Realisation (\$/kg)		% Share in Total Jan 09		Value % YoY
	Jan-08	Jan-09	Jan-08	Jan-09	Jan-08	Jan-09	Vol	Value	
Bangladesh	5,607	4,035	16.16	10.15	2.88	2.52	17.00	15.58	-37.19
Italy	1,367	1,112	6.63	5.17	4.85	4.65	4.68	7.93	-22.09
Egypt	2,624	2,277	7.14	4.92	2.72	2.16	9.59	7.56	-31.06
China	1,761	1,969	5.03	4.85	2.86	2.46	8.30	7.45	-3.57
Portugal	1,269	1,597	3.62	4.19	2.85	2.62	6.73	6.43	15.72
South Korea	2,851	1,242	8.77	3.39	3.08	2.73	5.23	5.20	-61.33
Sri Lanka	1,665	1,002	5.20	2.94	3.13	2.93	4.22	4.51	-43.60
Germany	1,295	844	4.35	2.88	3.36	3.41	3.56	4.42	-33.82
Iran	253	1,018	0.71	2.53	2.82	2.48	4.29	3.88	254.34
Japan	497	417	3.16	2.16	6.35	5.18	1.76	3.32	-31.49
Turkey	4,803	619	15.18	2.03	3.16	3.29	2.61	3.12	-86.60
Peru	2,631	700	7.33	1.76	2.79	2.51	2.95	2.70	-76.01
Colombia	1,345	771	3.32	1.70	2.47	2.21	3.25	2.61	-48.82
Tunisia	349	546	1.01	1.41	2.90	2.59	2.30	2.17	39.63
Brazil	1,815	451	5.11	1.15	2.81	2.56	1.90	1.77	-77.42
UAE	535	356	1.85	1.13	3.46	3.17	1.50	1.73	-38.97
Spain	605	401	1.79	1.11	2.96	2.78	1.69	1.71	-37.74
Russia	951	464	2.42	1.09	2.55	2.36	1.95	1.68	-54.87
Hong Kong	316	457	0.97	1.09	3.06	2.39	1.92	1.68	12.87
Taiwan	549	180	2.94	0.55	5.35	3.08	0.76	0.85	-81.16
Morocco	721	344	2.04	0.78	2.83	2.26	1.45	1.19	-61.87
Poland	358	325	1.77	0.75	4.95	2.31	1.37	1.15	-57.56
Israel	762	419	1.67	0.86	2.19	2.06	1.77	1.33	-48.23
Mauritius	503	161	1.65	0.46	3.27	2.83	0.68	0.70	-72.21
USA	468	181	1.47	0.51	3.14	2.83	0.76	0.79	-65.11
Malaysia	440	48	1.25	0.14	2.85	2.98	0.20	0.22	-88.66
Belgium	364	329	1.08	0.94	2.97	2.87	1.39	1.45	-12.43
	Lost Elites	New Elites		Major losers	Major gainers				

This January, 4 new destinations were added to the list of cotton yarn exports in addition to those covered in January 2008. However, their volumes were insignificant. They were Algeria, Estonia, Ethiopia and Ecuador. In similar comparison as many as 15 countries did not import any cotton yarn from India this January. The lost markets were Bahrain, Guatemala, Myanmar, Canada, Ireland, Switzerland, Puerto Rico, Chile, Singapore, France, New Zealand, Finland, Latvia, Cyprus and Swaziland. Their total volume import last year was close to 1 million kgs valued at US\$2.85 million.

COUNTS IN DEMAND

As many as 93 different counts of cotton yarn were exported from India in January 2009. Of these, only 11 counts formed the elite group. They were 30/1, 40/1, 24/1, 26/1, 36/1, 20/1, 32/1, 60/1, 50/1, 34/1 and 80/2. Together, their volume exports were 17.5 million kgs valued at US\$44 million and accounting for 68% of all cotton yarn exports in January 2009. Counts which

lost the elite category were 100/2, 60/2, 16/1, 32/2, 80/1, 40/2 and 120/2 compared to a year ago.

TABLE 11. COTTON YARN EXPORTS - MAJOR COUNTS (ABOVE US\$ 1 MLN.)									
	' 000 kgs		US\$ Mln		Unit Realisation (\$/kg)		% Share in Total Jan 09		Value % YoY
	Jan-08	Jan-09	Jan-08	Jan-09	Jan-08	Jan-09	Vol	Value	
30/1 Cotton	12,166	6,984	33.25	16.35	2.73	2.34	29.42	25.10	-50.83
40/1 Cotton	5,862	3,131	17.75	8.43	3.03	2.69	13.19	12.94	-52.52
24/1 Cotton	3,069	1,396	8.63	3.16	2.81	2.26	5.88	4.85	-63.38
26/1 Cotton	1,714	1,200	4.64	3.07	2.71	2.56	5.06	4.71	-33.79
36/1 Cotton	1,003	902	2.94	2.27	2.93	2.51	3.80	3.48	-22.84
20/1 Cotton	3,096	1,058	7.39	2.21	2.39	2.09	4.46	3.39	-70.10
32/1 Cotton	653	917	1.79	2.16	2.74	2.35	3.86	3.31	20.74
60/1 Cotton	1,146	528	4.91	2.14	4.28	4.06	2.23	3.29	-56.30
50/1 Cotton	1,280	604	4.91	1.96	3.83	3.25	2.54	3.01	-60.02
34/1 Cotton	429	592	1.25	1.45	2.91	2.45	2.49	2.23	16.47
80/2 Cotton	358	177	2.61	1.22	7.29	6.91	0.74	1.88	-53.09
100/2 Cotton	267	83	2.77	0.85	10.37	10.22	0.35	1.30	-69.46
60/2 Cotton	378	184	2.05	0.91	5.42	4.92	0.78	1.39	-55.70
16/1 Cotton	759	373	1.64	0.83	2.16	2.21	1.57	1.27	-49.70
32/2 Cotton	437	86	1.39	0.22	3.17	2.60	0.36	0.34	-83.85
80/1 Cotton	203	108	1.37	0.54	6.73	5.01	0.45	0.83	-60.40
40/2 Cotton	361	269	1.24	0.82	3.45	3.06	1.13	1.26	-33.93
120/2 Cotton	113	20	1.12	0.21	9.94	10.64	0.08	0.33	-80.90
	Lost Elites		Major losers						

In case of 30/1 cotton yarn Egypt, Bangladesh, Portugal and Colombia were the major destinations with imports worth over US\$ 1 million in December 2008. However, in terms of growth Hong Kong, South Africa, Tunisia and United Arab Emirates recorded significant increases almost doubling imports from India. They together imported US\$1.3 million worth of 30/1 cotton yarn as against just US\$0.4 million last year.

Major destinations for 40/1 were Bangladesh and China where exports were worth over US\$ 1 million. Fast growing markets were Italy, China, United Kingdom, Iran, Portugal, Hong Kong and Tunisia while Germany, Malaysia and Turkey declined significantly to almost half of last year.

Following table presents country-wise exports of major counts in terms of volume and unit prices realization. They are ordered by the total value exports of these major counts.

TABLE 12. COTTON YARN EXPORTS - MAJOR COUNTS BY COUNTRY IN VOLUME ('000 KGS) - JANUARY 2009

In order of val.	30/1	40/1	24/1	26/1	36/1	20/1	32/1	60/1	50/1	34/1	80/2
Bangladesh	895	580	127	375	78	102	168	19	8	558	0.05
Italy	140	75	94		168	13		10	16		13
Egypt	1,147	162	343		139	318					
China	226	496		167	22	22	332		0		
Portugal	768	127	188		127	21		18	136		19
South Korea	220	259	91					62	145		8
Sri Lanka	234	225	45	148	9	47	62	1	20	20	16
Germany	289	58	89		3	7		93	10		
Iran	301	295		161			120				
Japan	22	7				0		79	22		51
Turkey	152	178			44	1			69		9
Peru	205	25			39	154	20		52		
Colombia	525	21				118					19
Tunisia	289	59	31		36	1			29		
Brazil	106			303	19	22					
UAE	39	96				3		133	7		
Spain	113	12	13	2	70	9					
Russia	215				38	19					
Hong Kong	133	61	22	44			153	5			

Comprising Elite Group only (see page 2)

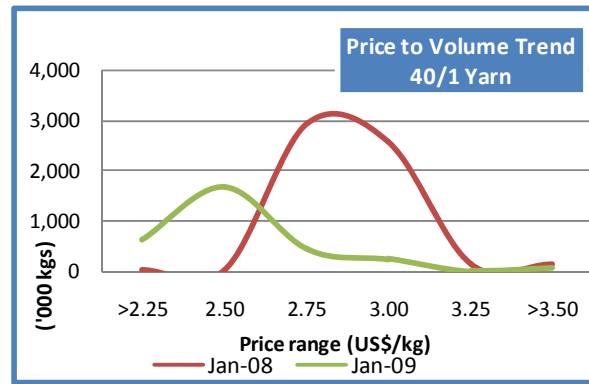
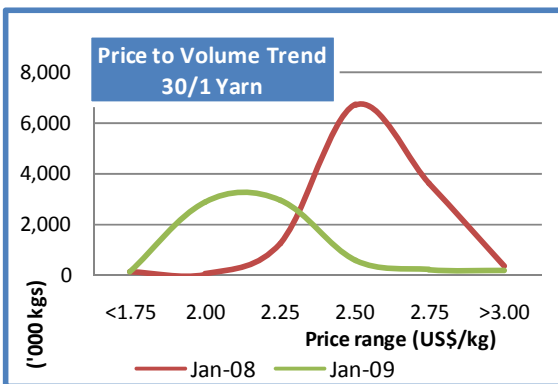
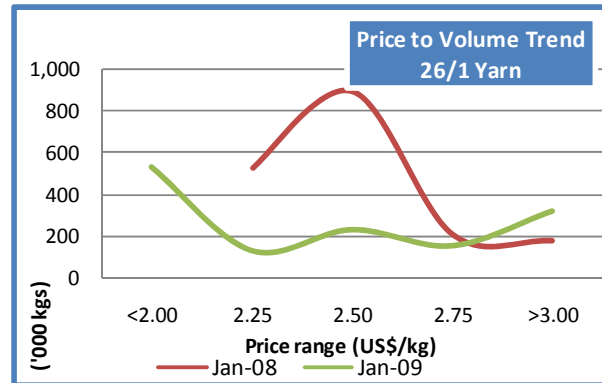
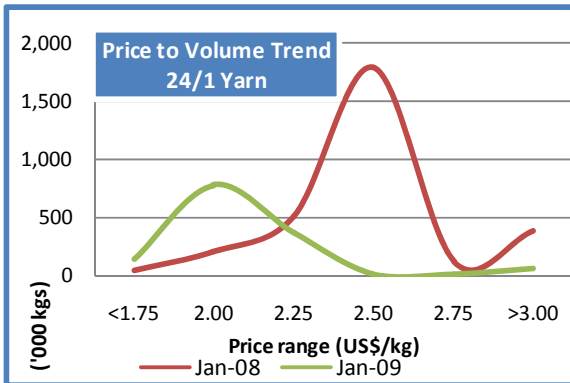
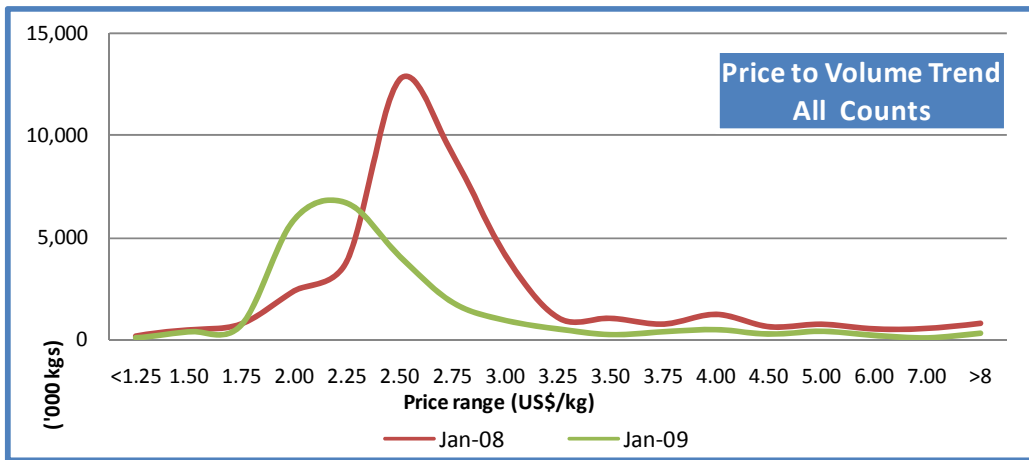
TABLE 13. COTTON YARN EXPORTS - MAJOR COUNTS BY COUNTRY IN UNIT REALISATION (\$/KG) - JANUARY 2009

	30/1	40/1	24/1	26/1	36/1	20/1	32/1	60/1	50/1	34/1	80/2
Bangladesh	2.38	2.72	2.13	2.48	2.30	1.98	2.33	3.81	3.92	2.43	2.48
Italy	2.64	2.76	2.34		2.61	2.09		3.24	3.89		6.92
Egypt	2.11	2.58	2.04		2.38	1.83					
China	2.27	2.64		2.25	2.61	2.42	2.29		6.25		
Portugal	2.32	2.68	2.30		2.41	2.03		3.10	3.11		7.73
South Korea	2.31	2.53	2.11					3.53	3.21		6.74
Sri Lanka	2.82	2.94	4.25	3.49	2.49	3.07	2.84	8.41	3.03	2.87	6.01
Germany	2.44	2.77	2.36		3.18	3.52		4.43	3.34		
Iran	2.36	2.73		2.26			2.53				
Japan	2.62	4.07				4.19		4.80	5.34		7.81
Turkey	2.88	2.71			2.51	15.70			3.03		5.40
Peru	2.30	3.13			2.48	2.09	2.44		3.32		
Colombia	2.20	2.36				1.99					5.10
Tunisia	2.45	2.66	2.25		2.88	4.60			2.93		
Brazil	2.56			2.57	2.61	2.39					
United Arab Emi- rates	2.22	2.56				4.32		3.30	3.07		
Spain	2.21	2.58	2.27	3.36	2.69	2.17					
Russia	2.34				2.60	2.06					
Hong Kong	2.36	2.61	2.19	2.23			2.24	6.13			

Comprising Elite Group only (see page 2)

PRICE CURVE³

The average unit price realization for all cotton counts was US\$2.74 per kg, down by 12% compared to the realization a year ago. However, it was 6% lower than the average a month ago. Compared to the peak (July 08), January numbers have lost almost 12%. The following charts presents the volumes to unit price realization for all major counts of cotton yarn for January 2009 as against January 2008.

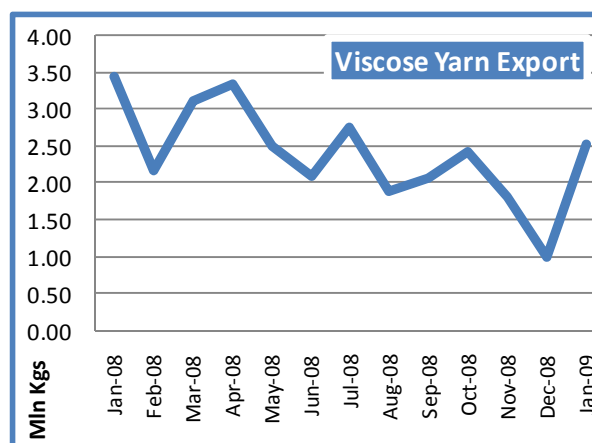


³ See page 2 for explanation

MANMADE FIBRE YARNS

VISCOSE YARN

Viscose yarn is the second largest export item among spun yarns, only after cotton and the largest among all man-made fibre yarns. In January 2009, 2.54 million kgs of viscose yarn was exported earning about US\$7 million. Compared to a year ago, the volumes were down 26% while value showed a decline of 46%. Thus, among all spun



yarns, the performance of viscose yarn had improved significantly. Unit realization too was significantly down by 27% during January 2009 from its year ago level. Thus, viscose yarn exports for the cumulative period April 2008 to January 2009 was 22.5 million kgs valued at US\$74 million. Unit value realisation averaged US\$3.24 per kg.

Compared to a month ago, viscose yarn export showed significant improvement in January 2009. It volumes were up 150% while value showed a bit lower growth of 137%. This implied that unit value realization was down 5%. The monthly volume was the third highest in this fiscal only after April and July 2008.

TABLE 14. TREND IN VISCOSE YARN EXPORTS

	'000 Kgs	US\$ Mln	Unit Realisation (US\$/Kg)
Jan-08	3,446	13.65	3.96
Feb-08	2,178	8.25	3.79
Mar-08	3,125	12.07	3.86
Apr-08	3,348	12.67	3.78
May-08	2,509	8.35	3.33
Jun-08	2,112	7.32	3.46
Jul-08	2,754	9.14	3.32
Aug-08	1,902	6.00	3.16
Sep-08	2,068	6.42	3.11
Oct-08	2,443	7.79	3.19
Nov-08	1,837	5.79	3.15
Dec-08	1,015	3.08	3.04
Jan-09	2,544	7.32	2.88

VISCOSE YARN: DESTINATION AND MARKET CONCENTRATION

In January 2009, viscose yarn was exported to 31 countries as against 26 last year. This implies that more markets were captured in the last 12 months. Exports to about 15 countries were

worth over US\$0.10 million in January 2009 as against 19 last year. This year two countries topped with export worth over US\$1 million each as against 4 last year. Four countries, Belgium, Italy, Brazil and Iran accounted for about 50% of viscose yarn exports with total volumes at 1.3 million worth US\$3.89 million.

In terms of new market, Bangladesh, Jordan, Slovakia, Canada, Peru and Chile entered the list of importing countries this January in comparison to last year's importing countries. However, their combined volumes were insignificant at 133, 000 kgs worth US\$0.40 million. While exports declined significantly to most countries in January, Spain and Tunisia were exception to this trend. Exports to Spain jumped 425% with volumes touching 77,000 kgs valued at US\$0.20 million. Similarly, export to Tunisia was up 59% at US\$0.13 million with volumes of around 45,000 kgs.

The fast losing markets were Belgium, Iran, Germany, Turkey and Egypt among major destinations. No exports were recorded to Mauritius, Switzerland, Denmark, Saudi Arabia, United Arab Emirates, Lithuania and Guatemala this January. Last year they together had imported 226,000 kgs of viscose yarn worth US\$0.87 million. Thus, the gained market partially covered the value of the lost markets.

TABLE 15. VISCOSE YARN EXPORTS - MAJOR DESTINATION (ABOVE US\$ 0.10 MLN.)									
	' 000 kgs		US\$ Mln		Unit Realisation (\$/kg)		% Share in Total Jan 09		Value % YoY
	Jan-08	Jan-09	Jan-08	Jan-09	Jan-08	Jan-09	Vol	Value	
Belgium	607	369	2.47	1.21	4.06	3.28	14.49	16.52	-51.03
Italy	511	391	1.99	1.12	3.89	2.87	15.37	15.35	-43.53
Brazil	381	367	1.56	1.08	4.10	2.93	14.43	14.70	-31.17
Iran	411	190	1.56	0.48	3.80	2.54	7.48	6.61	-69.07
USA	177	149	0.73	0.43	4.10	2.90	5.87	5.91	-40.52
Germany	199	133	0.79	0.39	3.99	2.94	5.22	5.34	-50.63
Turkey	210	152	0.85	0.37	4.04	2.45	5.97	5.08	-56.20
Morocco	136	149	0.51	0.34	3.73	2.29	5.84	4.65	-32.96
UK	70	79	0.29	0.21	4.09	2.72	3.11	2.94	-25.34
Spain	9	77	0.04	0.20	4.15	2.61	3.05	2.77	427.62
Egypt	236	68	0.91	0.19	3.86	2.82	2.68	2.63	-78.85
Syria	71	51	0.28	0.19	4.00	3.63	2.00	2.53	-34.60
Poland	41	62	0.17	0.17	4.14	2.71	2.44	2.30	-0.13
Tunisia	20	45	0.08	0.13	3.93	2.83	1.76	1.73	59.35
Portugal	29	43	0.12	0.10	4.18	2.33	1.69	1.37	-16.01
Mauritius	77		0.30		3.87				
Argentina	66	22	0.26	0.05	3.92	2.31	0.86	0.69	-80.62
Switzerland	36		0.17		4.75				
Denmark	50		0.15		3.00				
	Lost Elites	New Elites			Major losers	Major gainers			

VISCOSE YARN: COUNTS IN DEMAND

As many as 21 different counts of viscose yarn were exported in January 2009 as against 22 in January 2008. Of these only 9 counts were worth exports over US\$0.10 million. They were 30/1, 40/1, 24/2, 24/1, 12/4, 34/1, 20/2, 28/1 and 36/1 Viscose yarn. The single largest was 30/1 fetching US\$3.59 million during January 2009. The distant second was 40/1 with exports of US\$0.36 million.

This January 34/1 was the new count entering the list of all counts exported a year ago. In similar comparison, counts which lost out were 16/4, 28/2, 12/1, 19/2, 16/2, 26/1, 60/1, 18/2 and 7/2.

TABLE 16. VISCOSE YARN EXPORTS - MAJOR COUNTS (ABOVE US\$ 0.10 MLN.)

	' 000 kgs		US\$ Mln		Unit Realisation (\$/kg)		% Share in Total Jan 09		Value % YoY
	Jan-08	Jan-09	Jan-08	Jan-09	Jan-08	Jan-09	Vol	Value	
30/1 Viscose	1,420	1,344	5.56	3.59	3.92	2.67	52.83	49.10	-35.42
40/1 Viscose	13	98	0.07	0.36	5.02	3.63	3.86	4.87	428.20
24/2 Viscose	135	67	0.54	0.22	3.99	3.34	2.62	3.05	-58.54
24/1 Viscose	107	74	0.42	0.20	3.97	2.64	2.91	2.68	-53.89
12/4 Viscose	103	59	0.39	0.17	3.75	2.90	2.33	2.34	-55.62
34/1 Viscose		49		0.14		2.86	1.94	1.94	
20/2 Viscose	70	51	0.25	0.14	3.63	2.79	1.99	1.93	-44.31
28/1 Viscose	22	44	0.08	0.10	3.82	2.40	1.71	1.43	24.74
36/1 Viscose	61	36	0.26	0.10	4.20	2.64	1.43	1.32	-62.35
16/4 Viscose	155		0.66		4.23				
16/2 Viscose	135	23	0.50	0.06	3.69	2.45	0.91	0.77	-88.60
30/2 Viscose	88	32	0.37	0.09	4.14	2.83	1.26	1.24	-75.26
20/1 Viscose	65	8	0.29	0.03	4.46	3.95	0.31	0.43	-89.18
28/2 Viscose	43		0.18		4.28				
12/1 Viscose	43		0.14		3.37				
	Lost Elites	New Elites			Major losers	Major gainers			

The major buyers of 30/1 viscose yarn were Italy, Brazil, Iran and Morocco 100,000 kgs. They together imported more than half the 899,000 kgs of viscose yarn in January 2009.

In other major count, 40/1 was largely exported to USA and UK while 24/2 was solely Germany. 24/1 exports were mainly to Morocco and UK while Egypt was the only importer of 12/4 viscose yarn.

Following tables present country-wise exports of major counts in terms of volume and unit prices realization. They are ordered by the total value exports of these major counts.

TABLE 17. VISCOSE YARN EXPORTS - MAJOR COUNTS BY COUNTRY IN VOLUME ('000 KGS) - JANUARY 2009

	30/1	40/1	24/2	24/1	12/4	34/1	20/2	28/1
Italy	327	1						
Brazil	254	16						
Iran	190							
Germany	62		67	3				
USA		36					51	
Morocco	127			21				
Turkey	65							44
United Kingdom	20	20		39				
Egypt	9				59			
Spain	60	4						
Belgium	21							
Tunisia	42							
Poland	34							
Portugal	43							

Comprising Elite Group only (see page 2)

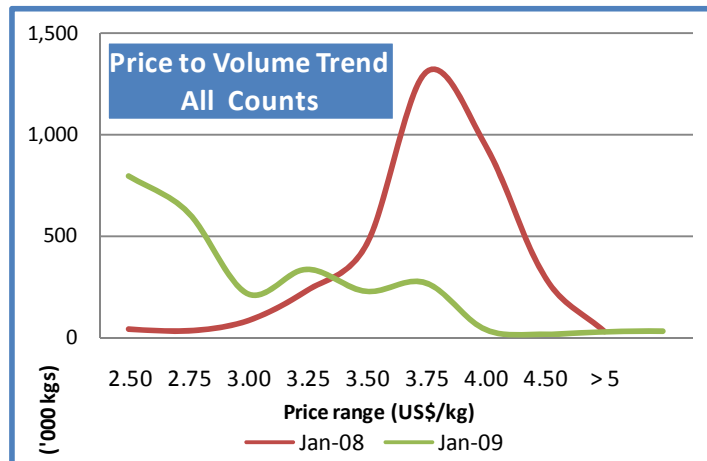
TABLE 18. VISCOSE YARN EXPORTS - MAJOR COUNTS BY COUNTRY IN UNIT REALISATION (\$/KG) - JANUARY 2009

	30/1	40/1	24/2	24/1	12/4	34/1	20/2	28/1
Italy	2.94	4.13						
Brazil	2.93	3.25						
Iran	2.54							
Germany	2.45		3.34	4.05				
USA		3.04					2.79	
Morocco	2.33			2.05				
Turkey	2.34							2.40
United Kingdom	2.39	3.30		2.58				
Egypt	2.32				2.90			
Spain	2.43	5.15						
Belgium	2.37							
Tunisia	2.77							
Poland	2.66							
Portugal	2.33							

Comprising Elite Group only (see page 2)

VISCOSE YARN: PRICE CURVE

The average unit price realization for all viscose counts was US\$2.88 per kg in January 2009, down 27% compared to the realization a year ago. This is the first time in last 12 months that prices have fallen below the US\$3.00 per kg mark. However, it was 5% lower than

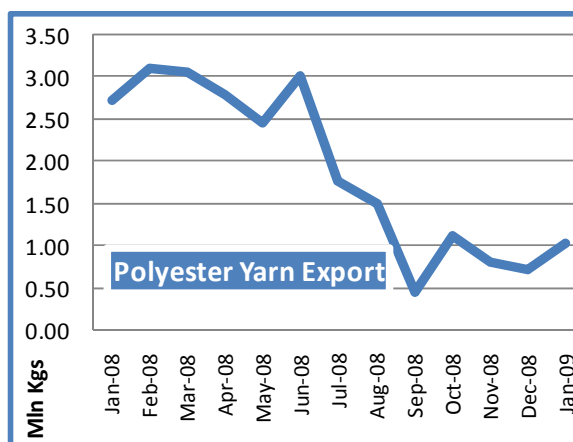


the average a month ago. The average unit price realization has been on a consistent decline. From a high of US\$3.96 per kg in January 2008, it reached US\$2.88 per kg in December, with a substantial fall witnessed in May 2008.

The price curve has shifted backward significantly in January 2009. Although the prices have declined demand did not pick up and volumes remained abysmally low.

POLYESTER YARN

Polyester yarn is the fourth largest among exports of spun yarns. In January 2009, over 1 million kgs of polyester spun yarn was exported worth US\$2.84 million. This was almost half the volume and value exported a year ago. Although exports have declined, its unit realization improved in January 2009. At US\$2.77 per kg, the realization was up



1% compared to a year ago. Thus, cumulatively polyester yarn exports during the period April 2008 to January 2009 was 15.6 million kgs valued at US\$43 million. Unit value realisation averaged US\$2.78 per kg.

TABLE 19. TREND IN POLYESTER YARN EXPORTS

	'000 Kgs	US\$ Mln	Unit Realisation (US\$/Kg)
Jan-08	2,719	7.46	2.74
Feb-08	3,105	7.46	2.40
Mar-08	3,055	7.62	2.49
Apr-08	2,783	7.54	2.71
May-08	2,467	6.80	2.76
Jun-08	3,011	8.19	2.72
Jul-08	1,776	5.43	3.06
Aug-08	1,504	3.61	2.40
Sep-08	451	1.26	2.80
Oct-08	1,114	3.18	2.85
Nov-08	809	2.24	2.77
Dec-08	717	2.13	2.97
Jan-09	1,025	2.84	2.77

POLYESTER YARN: DESTINATIONS AND MARKET CONCENTRATION

In January 2009, polyester yarn was exported to 30 countries as against 31 last year. Thus, the loss in number of destination was insignificant. 11 countries formed the elite group with export value of over US\$0.10 million during January 2009 whereas last they were 16 in total. This January no destination was above US\$1 million mark while last year Turkey was the sole destination to import polyester spun yarn worth above US\$1 million.

Polyester exports found 7 new destinations of which Nigeria and Taiwan were the major ones forming the Elite group. The minor new markets were Mauritius, Slovakia, Madagascar and Aus-

tralia. These 7 destinations were worth US\$0.45 million with total volume export of 182,000 kgs.

TABLE 20. POLYESTER YARN EXPORTS - MAJOR DESTINATION (ABOVE US\$ 0.10 MLN.)

	' 000 kgs		US\$ Mln		Unit Realisation (\$/kg)		% Share in Total Jan 09		Value % YoY
	Jan-08	Jan-09	Jan-08	Jan-09	Jan-08	Jan-09	Vol	Value	
Bangladesh	64	236	0.27	0.67	4.29	2.85	23.02	23.64	145.17
Turkey	633	147	1.54	0.35	2.44	2.39	14.37	12.39	-77.19
Romania	122	52	0.65	0.20	5.34	3.83	5.03	6.95	-69.66
Egypt	219	70	0.55	0.19	2.50	2.73	6.78	6.69	-65.42
Nigeria		65		0.15		2.27	6.36	5.20	
Sri Lanka	1	51	0.00	0.13	7.09	2.65	4.93	4.71	3545.18
Taiwan		26		0.11		4.45	2.49	4.00	
Israel	15	40	0.09	0.11	5.99	2.67	3.87	3.73	19.14
China	14	21	0.07	0.10	4.84	4.59	2.05	3.40	43.57
Japan	17	37	0.05	0.10	3.27	2.59	3.60	3.36	73.80
UAE	5	22	0.02	0.10	3.53	4.26	2.18	3.35	391.08
Brazil	597	1	1.42	0.00	2.38	5.29	0.09	0.16	-99.67
Peru	187		0.42		2.27		0.00	0.00	-100.00
USA	173	2	0.41	0.01		5.09	0.21	0.39	
Belgium	117		0.31		2.67		0.00	0.00	-100.00
Spain	116	19	0.26	0.04	2.26	2.24	1.86	1.51	-83.74
Indonesia	27	12	0.24	0.04		3.07	1.13	1.25	
Germany	69	17	0.22	0.05	3.13	3.10	1.64	1.83	-76.00
Argentina	65	10	0.16	0.02		2.14	0.94	0.72	
Kenya	44		0.13						
Morocco	57	23	0.13	0.07	2.34	2.98	2.26	2.43	-48.27
Italy	44	5	0.11	0.01	2.57	1.75	0.45	0.29	-92.76
Singapore	42		0.10		2.49				

Lost Elites New Elites Major losers Major gainers

POLYESTER YARN: COUNTS IN DEMAND

TABLE 21. POLYESTER YARN EXPORTS - MAJOR COUNTS (ABOVE US\$ 0.10 MLN.)

	' 000 kgs		US\$ Mln		Unit Realisation (\$/kg)		% Share in Total Jan 09		Value % YoY
	Jan-08	Jan-09	Jan-08	Jan-09	Jan-08	Jan-09	Vol	Value	
60/1 Polyester		46		0.11		2.47	4.48	3.99	
30/2 Polyester	21	47	0.06	0.10	2.86	2.18	4.61	3.62	68.66
70/2 Polyester		21		0.10		4.54	2.09	3.42	
80/1 Polyester		31		0.10		3.07	3.06	3.39	
30/1 Polyester	801	43	1.92	0.09	2.39	2.16	4.22	3.28	-95.14
20/1 Polyester	196	18	0.43	0.05	2.21	2.99	1.72	1.86	-87.81
16/3 Polyester	122		0.30		2.43				
12/4 Polyester	135		0.29		2.12				
20/2 Polyester	73	34	0.20	0.09	2.68	2.54	3.31	3.04	-55.81
20/3 Polyester	48		0.12		2.53				
18/2 Polyester	25		0.12		4.70				
12/1 Polyester	52		0.11		2.15				
24/1 Polyester	40		0.11		2.63				

Lost Elites New Elites Major losers Major gainers

BLENDYED YARNS

POLYESTER / COTTON BLENDED YARN

TABLE 22. TREND IN PC YARN EXPORTS

	'000 Kgs	US\$ Mln	Unit Realisation (US\$/Kg)
Jan-08	2,695	6.97	2.59
Feb-08	2,831	7.39	2.61
Mar-08	3,055	7.62	2.49
Apr-08	3,391	8.37	2.47
May-08	2,915	7.10	2.43
Jun-08	3,058	7.77	2.54
Jul-08	2,582	6.76	2.62
Aug-08	2,368	6.04	2.55
Sep-08	1,733	4.38	2.53
Oct-08	1,372	3.50	2.55
Nov-08	1,299	3.29	2.53
Dec-08	1,625	3.92	2.41
Jan-09	1,352	2.88	2.13

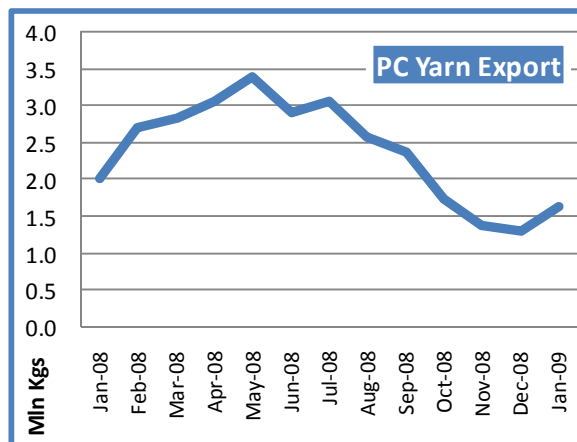


TABLE 23. POLY/COT BLENDED YARN EXPORTS - MAJOR DESTINATIONS (ABOVE US\$ 0.10 MLN.)

	' 000 kgs		US\$ Mln		Unit Realisation (\$/kg)		% Share in Total Jan 09		Value % YoY
	Jan-08	Jan-09	Jan-08	Jan-09	Jan-08	Jan-09	Vol	Value	
Egypt	29	160	0.11	0.42	3.73	2.60	11.86	14.47	283.84
China	287	195	0.61	0.37	2.13	1.88	14.42	12.75	-39.95
Philippines	45	133	0.10	0.26	2.17	1.94	9.84	8.95	166.08
Spain	351	107	0.95	0.25	2.71	2.32	7.94	8.65	-73.74
Bangladesh	55	93	0.14	0.18	2.48	1.95	6.84	6.26	31.87
Saudi Arabia	47	117	0.11	0.18	2.40	1.52	8.69	6.18	59.52
Argentina	68	77	0.16	0.14	2.28	1.80	5.68	4.79	-11.47
Turkey	315	70	0.74	0.12	2.34	1.76	5.16	4.26	-83.33
Algeria	112	48	0.30	0.12	2.65	2.46	3.52	4.07	-60.30
Portugal	113	46	0.30	0.12	2.61	2.53	3.39	4.02	-60.85
Italy	78	47	0.26	0.10	3.38	2.03	3.51	3.34	-63.43
USA	167	13	0.52	0.03	3.12	2.68	0.93	1.17	
Brazil	195		0.48		2.45				
Morocco	134	22	0.33	0.05	2.45	2.17	1.60	1.62	-85.72
Germany	107	13	0.28	0.04	2.58	2.91	0.95	1.30	-86.48
Chile	64		0.18		2.83				
Taiwan	41		0.18		4.25				
Peru	65	23	0.16	0.04	2.54	1.96	1.67	1.53	-73.15
Belgium	65	21	0.16	0.05	2.45	2.42	1.52	1.72	-69.04
Tunisia	71		0.15		2.14				
Israel	66	13	0.15	0.03	2.21	2.24	0.96	1.01	-80.07
Pakistan	22		0.10		4.79				

Lost Elites

New Elites

Major losers

Major gainers

TABLE 24. POLY/COT BLENDED YARN EXPORTS - MAJOR COUNTS (ABOVE US\$ 0.10 MLN.)

	' 000 kgs		US\$ Mln		Unit Realisation (\$/kg)		% Share in Total Jan 09		Value % YoY
	Jan-08	Jan-09	Jan-08	Jan-09	Jan-08	Jan-09	Vol	Value	
30/1 PC	439	167	1.13	0.39	2.57	2.32	12.33	13.42	-65.72
24/1 PC	230	171	0.58	0.38	2.51	2.21	12.63	13.11	-34.76
10/1 PC	135	143	0.29	0.26	2.11	1.79	10.58	8.87	-10.37
36/1 PC	4	101	0.01	0.24	2.35	2.38	7.50	8.39	2701.17
20/1 PC	185	115	0.47	0.23	2.54	2.00	8.47	7.94	-51.52
16/1 PC	259	118	0.57	0.22	2.18	1.90	8.73	7.79	-60.29
40/1 PC	30	67	0.11	0.19		2.83	4.99	6.64	70.44
12/3 PC	84	59	0.20	0.10	2.40	1.76	4.35	3.60	-48.68
12/4 PC	297	29	0.68	0.05	2.30		2.13	1.73	-92.70
30/2 PC	170	21	0.50	0.05	2.93	2.36	1.53	1.70	-90.18
24/2 PC	86	30	0.23	0.07	2.72		2.21	2.43	-70.02
60/2 PC	47		0.23		4.86				
14/3 PC	73	14	0.17	0.02	2.30	1.76	1.04	0.86	-85.35
8/1 PC	60		0.14		2.27				
36/2 PC	35	7	0.11	0.03	3.21	3.47	0.54	0.87	-77.81
	Lost Elites	New Elites			Major losers	Major gainers			

POLYESTER / VISCOSE BLENDED YARN

TABLE 25. TREND IN PV YARN EXPORTS

	'000 Kgs	US\$ Mln	Unit Realisation (US\$/Kg)
Jan-08	2,874	8.91	3.10
Feb-08	2,825	8.45	2.99
Mar-08	2,502	7.42	2.97
Apr-08	1,823	5.68	3.11
May-08	2,357	7.14	3.03
Jun-08	2,488	7.23	2.91
Jul-08	2,068	6.26	3.03
Aug-08	1,208	3.12	2.59
Sep-08	2,622	7.02	2.68
Oct-08	1,612	4.74	2.94
Nov-08	1,241	3.51	2.83
Dec-08	777	2.30	2.96
Jan-09	806	2.49	3.09

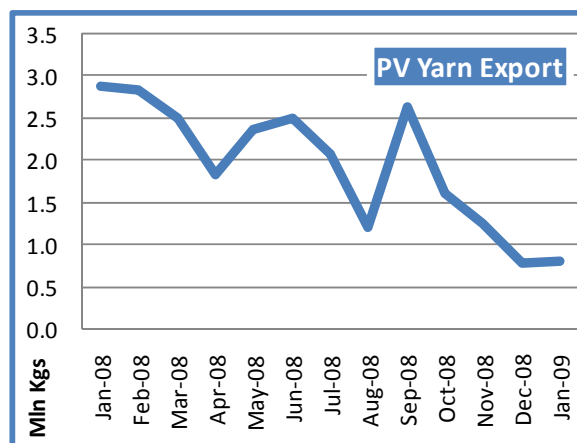


TABLE 26. POLY/VIS BLENDED YARN EXPORTS - MAJOR DESTINATIONS (ABOVE US\$ 0.10 MLN.)

	' 000 kgs		US\$ Mln		Unit Realisation (\$/kg)		% Share in Total Jan 09		Value % YoY
	Jan-08	Jan-09	Jan-08	Jan-09	Jan-08	Jan-09	Vol	Value	
	Romania		129		0.79		6.16	15.97	
Turkey	851	264	2.67	0.62	3.14	2.36	32.78	25.08	-76.62
Italy	4	52	0.02	0.14	3.80	2.60	6.50	5.46	786.99
Egypt	261	46	0.80	0.12	3.06	2.53	5.66	4.63	-85.57
Poland		43		0.10		2.39	5.28	4.09	
Brazil	475	24	1.30	0.05	2.75	2.20	2.97	2.12	-95.96
South Africa	101		0.37		3.63				
Sudan	95		0.36		3.83				
Iran	116	19	0.35	0.06	3.00	3.04	2.34	2.31	-83.53
France	50	0	0.32	0.00	6.42	4.47	0.01	0.02	-99.86
Colombia	98	9	0.30	0.03	3.08	3.13	1.12	1.14	-90.59
Hong Kong	97		0.28		2.93				
Yemen	66		0.21		3.24				
Mexico	65	0	0.21	0.00	3.21	0.50	0.03	0.01	-99.94
Kenya	56	22	0.20	0.05	3.50	2.17	2.69	1.89	-75.96
Argentina	65	24	0.18	0.07	2.82	2.91	3.04	2.87	-60.81
Belgium	59		0.18		3.05				
Singapore	60		0.17		2.77				
Bangladesh	42	33	0.15	0.08	3.64	2.34	4.05	3.07	-50.08
Syria	45	32	0.14	0.08	3.07	2.55	3.97	3.28	-41.39
UAE	28	4	0.12	0.02	4.13	5.26	0.50	0.85	-81.61
Saudi Arabia	48		0.10		2.09				
Spain	32		0.10		3.12				
	Lost Elites	New Elites			Major losers	Major gainers			

TABLE 27. POLY/VIS BLENDED YARN EXPORTS - MAJOR COUNTS (ABOVE US\$ 0.10 MLN.)

	' 000 kgs		US\$ Mln		Unit Realisation (\$/kg)		% Share in Total Jan 09		Value % YoY
	Jan-08	Jan-09	Jan-08	Jan-09	Jan-08	Jan-09	Vol	Value	
30/1 PV	952	139	2.71	0.33	2.84	2.39	17.23	13.34	-87.73
37/2 PV	10	47	0.04	0.31	3.60	6.58	5.86	12.48	772.79
40/2 PV	71	100	0.25	0.29	3.57	2.85	12.43	11.47	12.69
30/2 PV	444	50	1.53	0.11	3.45	2.22	6.15	4.42	-92.83
14/3 PV		48		0.10		2.03	5.97	3.93	
24/1 PV	289		0.86		2.97				
28/1 PV	262		0.77		2.94				
40/1 PV	148	9	0.51	0.02	3.42	2.47	1.14	0.92	-95.49
24/2 PV	135	10	0.47	0.03	3.45	2.83	1.29	1.18	-93.70
20/1 PV	137		0.42		3.09				
28/2 PV	101		0.33		3.23				
36/2 PV	53		0.28		5.29				
20/2 PV	43		0.11		2.64				
	Lost Elites	New Elites		Major losers	Major gainers				

COUNTRY PROFILE - EGYPT



ABOUT EGYPT

Egypt is the world's 38th-largest country. In terms of land area, it is approximately the same size as all of Central America, twice the size of France, four times the size of UK and the combined size of the US states of Texas and Cali-

fornia. Egypt is bordered by Libya to the west, Sudan to the south, and by the Gaza Strip and Israel to the east. Egypt's important role in geopolitics stems from its strategic position: a transcontinental nation, it possesses a land bridge (the Isthmus of Suez) between Africa and Asia, which in turn is traversed by a navigable waterway (the Suez Canal) that connects the Mediterranean Sea with the Indian Ocean via the Red Sea. Egypt is the most populated country in the Middle East with an estimated 75 million people (as of mid-2008). Almost all the population is concentrated along the banks of the Nile (notably Cairo and Alexandria), in the Delta and near the Suez Canal.

Capital: *Cairo*

Currency: *Egyptian pound (EGP)*

Textile exports: *US\$2,019 million (US\$702 million textile and US\$1,317 million clothing)*

Textile imports: *US\$2,041 million (US\$1,234 million textile and US\$807 million clothing)*

TEXTILE DEVELOPMENT

Egypt's textile industry covers the entire spectrum of cotton processing operations, including spinning, weaving, converting, knitting, and garment manufacture. The industry is of paramount importance to the Egyptian economy as it employs more than half a million people and is also a crucial foreign exchange earner. The industry has clocked an average rate of growth of 6.5%.

There are 4,250 weaving, textile and clothing manufacturers in Egypt, with their production accounting for 26% of national industrial revenues and 24% of industrial exports. Total Egyptian exports of ready-made clothing itself are estimated at US\$448 million per annum, making Egypt the world's 38th largest garment exporter. The Egyptian apparel industry is one of the most dynamic industrial sectors in Egypt. It comprises about 1500 private sector apparel and intermediate manufacturers. Apparel manufacturers also apply the latest technical innovations such as

Electronic Data Interchange, Supply Chain Management, and Product Data Management. Total apparel production is estimated at US\$ 3 billion a year, representing 3.5% of Egypt's total GDP.

The most important characteristic of Egypt's the textile/garment industry is that it is one of the very few manufacturing processes is handled completely in country. Thirty-one large public entities account for 100% of spinning, 70% of weaving, 40% of knitting, and 30% of the garment manufacturing industry. Although government-owned companies have traditionally dominated the industry, many have recently suffered from losses. The public sector is by far the main supplier for many textile products such as lint, yarn, and fabrics. On the other hand, textile exports with higher value added items, such as ready-made garments and clothing dominated by the private sector, have expanded successfully.

CHANGE IN PRODUCT MIX – MOVING TOWARDS HIGH VALUE GOODS

Egypt's textile (fibres, yarns and fabrics only) trade in 2008 indicates significant changes in the product mix. Its import of fabrics increased substantially by 17 folds during the year. A 21 folds increase was seen in cotton fabric imports at US\$205 million. Similarly, manmade fabric imports surged 14 folds to US\$148 million. This implies that the Egyptian



textile industry was moving towards high value added products like apparels and garments.

Exports (of textiles) also grew handsomely despite the global recession during the year, beating almost many major textile economies. Total exports at US\$380million were up 29% during the year. They comprised US\$135 million worth of yarn, US\$37 million worth of fabric and US\$207 million worth of fibres.

These changes largely reflected the country's strategy to invest huge amount in textile industry. A latest report of the Industrial Development Authority revealed that the number of textile and clothing factories established between January 2006 and January 2009 reached 452. The total investment had reached 7.6 billion EGP (US\$1.38 billion). This included 171 large factories representing investments worth 6.6 Billion EGP (US\$1.2 billion) The number of medium factories was 95 with investment in each ranging from 5 million EGP to 15 million EGP and total of 664.5 Million EGP (US\$120.8 million). About 186 small sized factories were also set during this period.

TARIFF PROFILE FOR TEXTILE AND CLOTHING

TABLE 28. EGYPT: TARIFFS PROFILE AND IMPORTS		
	Textile	Clothing
Final bound duties		
Average	27.80	40.00
Duty-free in %	-	-
Maximum	60.00	60.00
Binding in %	100.00	100.00
MFN applied duties		
Average	10.90	28.80
Duty-free in %	3.90	-
Maximum	20.00	20.00

TRADE WITH INDIA

India accounts for almost 18% of Egypt's imports of cotton and man-made fibres, yarns and fabric. Over the past three years, India's share in Egypt's import has increased from a mere US\$19 million in 2006 to almost US\$173 million in 2008 largely comprising of cotton yarn. Cotton yarn imports from India surged from US\$7 million in 2006 to a whopping US\$131 million in 2008.

Recently Egypt applied safeguards on all imports of yarn and fabrics to support its domestic textile industry. The applied safeguards are due to the massive surge of imports in 2007 and are valid until January 2010 will reach 25% of FOB value invoices of imported cotton and cotton blended yarn or 0.5US/cents for every imported KG of yarn. Meanwhile, safeguards have also been applied on imported cotton and cotton blended fabrics that will reach 25% of FOB value invoices or 1 USD for every KG of imported fabric. The applied safeguards are expected to dramatically reduce imports of Asian origin yarn and fabrics.

The Indian government has approached Egypt asking it to remove the additional duties imposed on Indian cotton textile imports or pay suitable compensation. The move by Cairo was actionable at the World Trade Organization), and if discussions fail India would drag Egypt to WTO.

DETAILS OF EGYPT'S TEXTILE IMPORT AND INDIA'S SHARE

TABLE 29. EGYPT'S FIBRE AND YARN IMPORT DETAILS - 2008					
HS code	Product description	Total Imports		India's share (%)	
		Qty '000 kgs	Value Mln US\$	Qty	Value
52	Cotton		619.43		22.3
5204	Cotton sewing thread	293	1.74	20.3	17.3
520411	Cotton sewing thread >85% cotton, not retail	207	0.94	25.5	18.7
520419	Cotton sewing thread, <85% cotton, not retail	57	0.67	4.9	15.8
520420	Cotton sewing thread, retail	28	0.13	13.1	14.1
5205	Cotton yarn not sewing thread >85% cotton, not retail	83,245	262.88	42.1	48.8
520511	Cotton yarn >85% single uncombed >714 dtex, not retail	31,019	70.97	29.1	29.8
520512	Cotton yarn >85% single uncombed 714-232 dtex, not ret	367	1.07	25.7	25.8
520513	Cotton yarn >85% single uncombed 232-192 dtex, not ret	74	0.21	29.0	22.2
520514	Cotton yarn >85% single uncombed 192-125 dtex, not ret				
520515	Cotton yarn >85% single uncombed <125 dtex, not retail	20,339	49.64	17.0	14.7
520521	Cotton yarn >85% single combed >714dtex, not retail	956	4.82	73.0	77.6
520522	Cotton yarn >85% single combed 714-232 dtex, not retail	23,077	114.45	80.3	75.7
520523	Cotton yarn >85% single combed 232-192 dtex, not retail	83	0.23	34.2	34.0
520524	Cotton yarn >85% single combed 192-125 dtex, not ret.	99	0.71	79.6	81.6
520525	Cotton yarn >85% single combed <125 dtex, not retail	365	1.15	70.6	55.3
520531	Cotton yarn >85% multiple uncombed >714 dtex, not ret	287	0.87	69.9	70.3
520532	Cotton yarn >85% multiple uncomb 714-232 dtex, not ret	43	0.14	95.2	89.2
520533	Cotton yarn >85% multiple uncomb 232-192 dtex, not ret				
520535	Cotton yarn >85% multiple uncombed <125 dtex, not ret	46	0.20	-	-
520541	Cotton yarn >85% multiple combed >714 dtex, not retail	197	0.89	60.2	37.4
520542	Cotton yarn >85% multiple combed 714-232 dtex, not ret	63	0.59	83.5	40.0
520543	Cotton yarn >85% multiple combed 232-192 dtex, not ret				
520544	Cotton yarn >85% multiple combed 192-125 dtex, not ret	1,779	4.28	33.1	38.6
520545	Cotton yarn >85% multiple combed <125 dtex, not retail	4,451	12.65	43.0	39.3
5206	Cotton yarn (except sewing) < 85% cotton, not retail	1,876	4.76	31.1	39.3
520611	Cotton yarn <85% single uncombed >714dtex, not retail	535	1.55	32.8	28.3
520612	Cotton yarn <85% single uncombed 714-232 dtex, not ret				
520613	Cotton yarn <85% single uncombed 232-192 dtex, not ret	511	0.63	-	-
520614	Cotton yarn <85% single uncombed 192-125 dtex, not ret				
520615	Cotton yarn <85% single uncombed <125 dtex, not retail				
520621	Cotton yarn <85% single combed >714 dtex, not retail	40	0.12	100.0	100.0
520622	Cotton yarn <85% single combed 714-232 dtex, not retail	87	0.48	37.8	52.3
520623	Cotton yarn <85% single combed 232-192 dtex, not retail	7	0.09	-	-
520624	Cotton yarn <85% single combed 192-125 dtex, not retail	20	0.06	100.0	100.0
520625	Cotton yarn <85% single combed <125 dtex, not retail	244	0.76	54.1	65.4
520631	Cotton yarn <85% multiple uncombed >714, not ret., ne	39	0.15	-	-
520632	Cotton yarn <85% multiple uncomb 714-232 dtex, not ret	0.44	0.01	-	-
520633	Cotton yarn <85% multiple uncomb 232-192 dtex, not ret				
520634	Cotton yarn <85% multiple uncomb 192-125 dtex, not ret	155	0.37	100.0	100.0
520635	Cotton yarn <85% multiple uncombed <125 dtex, not ret.	20	0.04	-	-
520642	Cotton yarn <85% multiple combed 714-232 dtex, not ret	1	0.01	100.0	100.0
520645	Cotton yarn <85% multiple combed <125 dtex, not retail	217	0.50	12.9	25.9
5207	Cotton yarn (except sewing thread) retail	42	0.53	10.1	16.9
520710	Cotton yarn (except sewing thread) >85% cotton, retail	13	0.20	2.3	8.7
520790	Cotton yarn (except sewing thread) <85% cotton, retail	29	0.33	13.6	22.0
55	Manmade staple fibres and yarns		341.86		10.2
5509	Yarn (not sewing), synthetic staple fibre, not retail	11,122	43.73	9.9	14.9
550911	Yarn >85% nylon, etc staple fibres, single, not retail	442	0.98	3.9	10.0

HS code	Product description	Total Imports		India's share (%)	
550941	Yarn >85% other synth staple fibres, single not retail	2	0.01	89.4	94.1
550942	Yarn >85% other synth staple fibre multiple not retail	226	0.65	-	-
550951	Yarn of polyester & artif staple fibres, not retail	821	1.78	21.9	27.6
550952	Yarn of polyester & wool or hair, not retail, nes	97	0.86	96.9	99.6
550953	Yarn of polyester & cotton, not retail, nes	3,393	7.52	3.1	3.7
550959	Yarn of polyester staple fibres, not retail, nes	3,024	20.42	16.0	19.0
550961	Yarn of acrylic staple fibre & wool or hair,not retail	41	0.52	-	-
550962	Yarn of acrylic staple fibres & cotton, not retail	23	0.11	-	-
550969	Yarn of acrylic staple fibres, not retail, nes	21	0.24	-	-
550991	Yarn of other synthetic staple with wool or hair, nes	44	0.40	68.1	67.9
550992	Yarn of other synth staple fibres + cotton not retail	62	0.13	98.5	79.4
550999	Yarn of other synth staple fibres + cotton not retail	669	3.52	13.3	10.3
5510	Yarn (not sewing), artificial staple fibre, not retail	534	3.64	50.2	28.2
551011	Yarn >85% artificial staple fibres, single, not retail	148	1.33	41.6	18.5
551012	Yarn >85% artif staple fibres, multiple,not retail,ne	12	0.02	-	-
551020	Yarn of artif staple fibres & wool or hair, not retail				
551030	Yarn of artificial staple fibres & cotton, not retail	20	0.11	87.6	80.3
551090	Yarn of artificial staple fibres, not retail, nes	354	2.18	53.3	31.7
5511	Yarn (not sewing), of manmade staple fibres, retail	61	0.17	15.6	18.3
551110	Yarn >85% synthetic staple fibres, retail, not sewing	18	0.04	-	-
551120	Yarn <85% synthetic staple fibres, retail not sewing	32	0.08	30.0	40.4
551130	Yarn of artificial fibres except sewing thread, retail	12	0.06	-	-
52+55	Total	-	961.29		18.0

ABOUT YNFX.COM

www.YnFx.com is a leading provider of Textile Market Intelligence and Market Development with a membership base spread across more than 150 countries. YnFx is a part of Mediagrif Interactive Technologies (Montreal, Canada) with head office in Dubai and corporate office in Mumbai, India.

With 9 years of experience serving the textile industry YnFx has built a formidable base of clients globally. With an aspiration to be the one-stop-shop for the textile industry, YarnsandFibers.com has evolved to **YnFx.com**. It covers a wide spectrum of the textile chain from Fibre to Fabric.

YNFX SERVICES

YnFx focuses on using online and offline mechanisms to bring people closer and deliver maximum value to members. YnFx understands business needs and builds an environment for textile professionals to conduct business providing users with highly targeted, easy-to-use interface, utilizing advanced Internet technology.

We offer 2 primary services:

Market Intelligence

From a stage of dearth of data, the excess of it overwhelms today's decision maker. Much of the data is raw and not consumable to assist in the decision making process.

The Market Intelligence team at YnFx senses and captures real-time intelligence about the industry. The team has a variety of sources on the Internet and on the ground to compile and provide members with authentic data.

Our Market Intelligence service is delivered through four channels

Primary channels:

1. PriceWatch
2. Industry News
3. Yarn ExportWatch Report
4. Industry Reports
5. Statistics
6. Researched Reports
7. Customized Reports

Secondary Channels:

1. Yarn Monitor
2. Inperspective
3. Business Confidence Index
4. Blogs
5. India Speaks

Market Development

The Market Development solution allows YnFx members to create their own dynamic Microsite to showcase their products, publish pricelists online, manage member communications, new user-friendly interface, and many more features and functions. Members can learn complete details of prospective buyers and suppliers prior to contacting them. YnFx is a platform for both buyers and suppliers to promote their products globally.

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