



OPPORTUNITIES IN THE RUSSIAN MARKET FOR SRI LANKAN GARMENTS

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1. MARKET OVERVIEW

a. Sri Lanka's position in the Global Market (61& 62)

i. Global Market size and trend for Apparel (last 5 years) in US\$ Mn

Global Imports	2007	2008	2009	2010	2011
Value	325,232	344,588	310,408	337,406	391,866

ii. Main World Importers of Apparel (HS 61 & 62)

Value in US\$ - US Dollars Mn.

Importers of Garments	2007	2008	2009	2010	2011
World	325,233	344,588	310,408	337,405	391,866
United States of America	78,920	76,363	66,795	75,646	81,514
Germany	28,001	30,504	30,965	32,693	38,239
Japan	22,598	24,216	24,070	25,262	31,111
United Kingdom	23,619	23,427	20,765,953	22,042	24,840
France	19,864	22,024	19,789	20,357	22,829
Italy	15,096	16,570	14,819	15,509	17,580
Hong Kong, China	18,137	17,563	14,706	15,709	16,091
Spain	12,640	14,925	12,718	13,165	15,861
Netherlands	7,468	8,427	8,011	8,531	10,756
Belgium	8,597	9,737	8,381	7,530	8,785
Canada	6,908	7,453	6,857	7,542	8,653
Russian Federation	2,841	4,225	3,674	5,551	6,744
United Arab Emirates	2,162	2,617	4,652	4,831	6,102

Source : Trade Map

Countries with higher % growth rate in imported value :

- China 60
- Republic of Korea 39
- Netherlands 26
- Japan 23
- Russian Federation 21
- Spain, Poland, Sweden 20

iii. Exports value of Apparel to World (HS61 & 62)US\$ Mn

Sri Lanka is in the 20th position in the world market and market share is 1% in 2011.

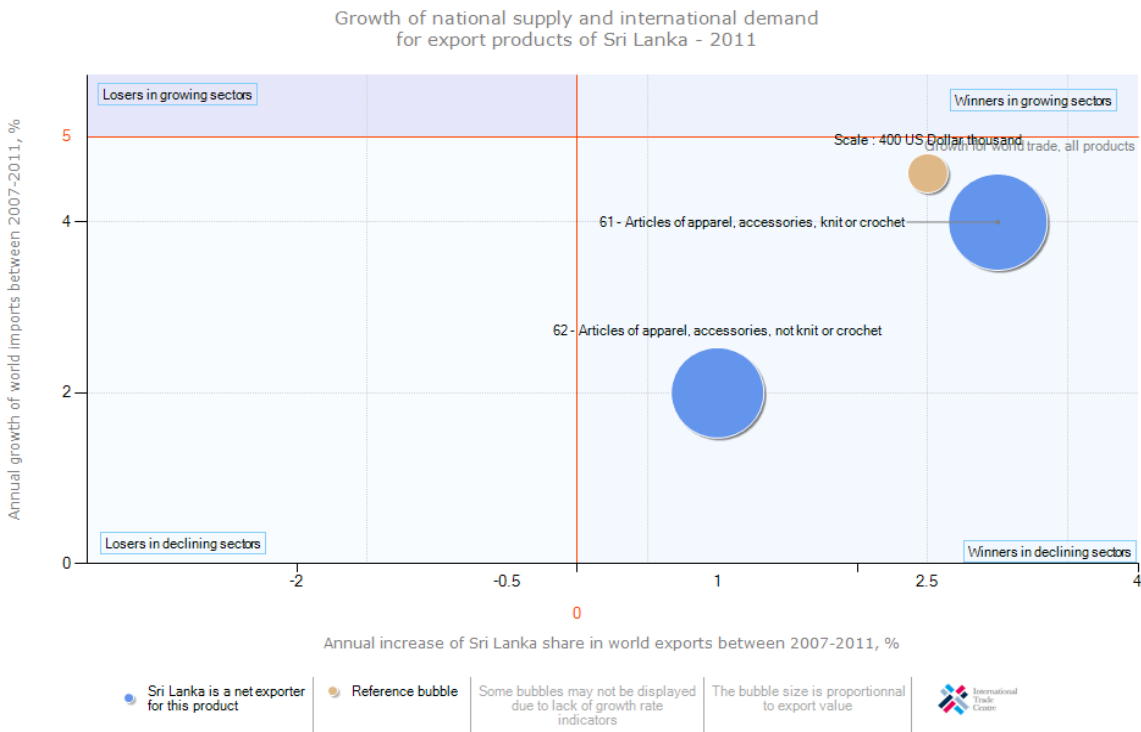
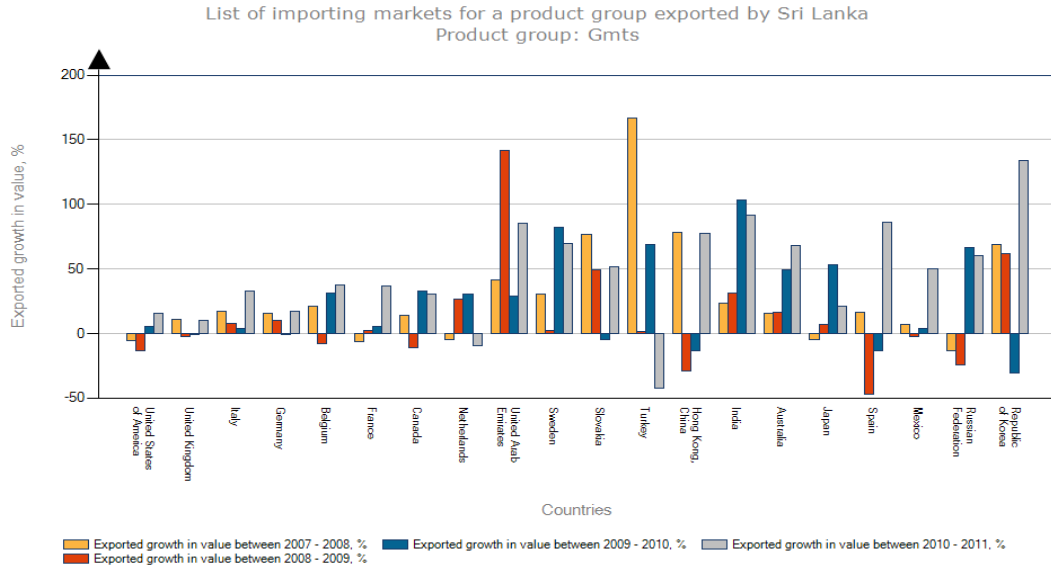
Exporting Country	2007	2008	2009	2010	2011
World	343,662,490	362,244,263	317,418,106	349,104,020	410,148,178
China	108,881	113,366	100,479	121,072	143,238
Hong Kong, China	27,277	26,488	21,796	22,884	23,171
Italy	21,711	23,579	18,480	18,567	21,399
Bangladesh	9,323	<i>13,193</i>	<i>13,818</i>	<i>16,194</i>	<i>21,398</i>
Germany	15,055	17,062	16,439	16,944	19,896
Viet Nam	7,204	8,500	8,329	10,119	<i>13,932</i>
India	9,373	10,265	11,312	10,604	13,745
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India	9,373	10,265	11,312	10,604	13,745
China	108,881	113,368	100,479	121,072	143,238
Turkey	13,468	13,155	11,223	12,382	13,513
France	10,107	10,867	9,317	9,221	10,111
Spain	5,490	6,913	7,063	6,893	9,228
Belgium	7,908	9,266	7,917	7,330	8,465
Netherlands	5,316	5,857	5,627	5,943	8,159
Sri Lanka	3,143	3,285	3,119	3,312	3,984

Source : ICT Calculations based on UN COMTRADE Statistics

(Data given in italics are based on Mirror data)

iv. Main Destinations of Sri Lanka's Garment Exports

Main importing markets of Garments from Sri Lanka are United States of America, United Kingdom, Italy, Belgium, India, Germany and Singapore



b) Sri Lanka's position in the Russian Market

Product	Russian Federation's Imports from Sri Lanka			Sri Lanka's Exports to world	
	Value in US\$ 000'2011	Annual Growth in value 2007-11% p.a	Share in Russian Federation's imports %	Value in 2011 (US\$ 000')	Annual Growth in Value 2007-2011% p.a
All Products	389,530	9	0.1	10,011,282	6
HS 61	46,733	38	1.4	2,110,464	7
HS 62	32,092	24	0.9	1,873,721	3
Total Garments	78,825			3,984,185	

Source; ICT Statistics

i. Russian Market Size and Trend in the last five years

	2007	2008	2009	2010	2011
All Products	352,266,399	467,993,955	301,796,059	400,100,000	478,009,197
All Garments	126,167	102,299	84,412	89,193	101,282
HS 61 Articles of apparel, accessories, not knit or crochet	108,784	84,942	66,753	69,449	79,501
HS 62 Articles of apparel, accessories, knit or crochet	17,383	17,357	17,659	19,744	21,781

Russian Federation recorded 37-41% annual growth of Garments/Apparel imports and 27-36% increase in terms of import value as per the 2010 statistics. It appears, that the trend remain in the year 2011 too.

Russia imports more than 100 products under HS 61& 62, and accounts for 70% of imports of the top three garment importing countries.

ii. Value of Sri Lanka's Exports of Apparel to Russian Federation (US\$ '000)

Value of Sri Lanka's Garment (HS 61&62)Exports to Russian Federation in US\$ 000'

Product	2009	2010	2011	2012 (Jan-Sep)
HS 61	3,488	5,479	9,020	4,678
HS 62	1,948	2,420	5,439	5,639
Total	5,436	7,900	14,459	10,307

Source : Sri Lanka Customs Statistics

2. TRENDS IN THE RUSSIAN FEDERATION FOR GARMENT MARKET

Given below is the analysis of current Garment exports from Sri Lanka to Russia in terms of value.

HS Number	Product Name	2010 (US\$ 000')	2011 (US\$ 000')	As a% to Total Garment Exports to Russian Federation
Total 61&62		7,899	14459	
611610	Gloves, Mittens and mitts knitted or crocheted	2,989	3,371	23.31
610711	Underpants, briefs, night shirts, pyjamas, bathrobes	292	2554	17.67
611020	Jersey,pullovers,cardigans,waistcoats	475	788	5.4
610712	Boys/men's underpants,briefs,night suites	-	563	3.8
610990	T-shirts,singlets and other vests	389	292	2.1
620342	Mens or boys suits,ensembles,jackets,blazers,trousers	657	2185	15.1
620462	Cotton Women's girls suits,ensembles,jackets,blazers,dresses,skirts	910	779	5.4
620469	Women's girls suits,ensembles,jackets,blazers,dresses,skirts made out of other textile materials	247	603	4.7
620520	Cotton Men's or boys shirts	168	336	2.3

Source : SL Customs Statistics

Top Garments supplying markets to Russian Federation the values, % growths and the share in Russian federation

Supplying Market	Imported Value 2011 (US\$ 000')	Growth in Value 2010-11%	Share in value in Russian Federation's imported % in 2011
China	3,465,003	15.6	51.4
Turkey	493,026	13.7	7.3
Italy	480,613	15.9	7.1
Bangladesh	269,806	85.3	4
India	192,970	63.5	2.9
Vietnam	175,041	66.3	2.6
Usbekistan	152,322	35.4	2.3
Kyrgyzstan	114,830	-13.9	2.3
Gemany	114,830	-29.1	1.7

Indonesia	89,796	54.7	1.3
Sri Lanka	78,825	76.8	1.2

Source : ICT Calculations based on UN COMTRADE Statistics



i. International Apparel brands in Russian Apparel Market

The leading brands in the Russian market are,

- GAP – Banana Republic, Old Navy, Piperlime, Athleta



- Victoria's Secret – Women's lingerie
- NIKE

ii. Companies importing Garments in Russia

The companies given below are engaged in the importation of products under HS 62 & HS 61,

- cotton, linen and knitted clothes for ladies & girls, men & boys, babies & children
- Gloves
- Hosiery

- Jackets & blazers
- Lingerie

Company Name	Web Site	Contact Details (Ph.No)
Otdel	http://www.remni.ru	7 495 2311 005
TDL Textil	http://www.tdl-txtil.ru	7 4932 591111
Adonis	http://www.adonis-kazan.ru	7 8432 920057
Mirmakes-M	http://www.mairamax.ru	7 4957 815628
Aneksteam	http://www.aneksteam.ru	7 3433 762554
Solo	http://www.solo.com.ru	7 499 1724990
Tecnoavia Production & Introction Firm	http://www.technoavia.ru	7 495 7879030
Dzhuliya	http://www.julia-opt.ru	7 8122 724212

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