

Cotton woven denim fabrics: Present and future prospects

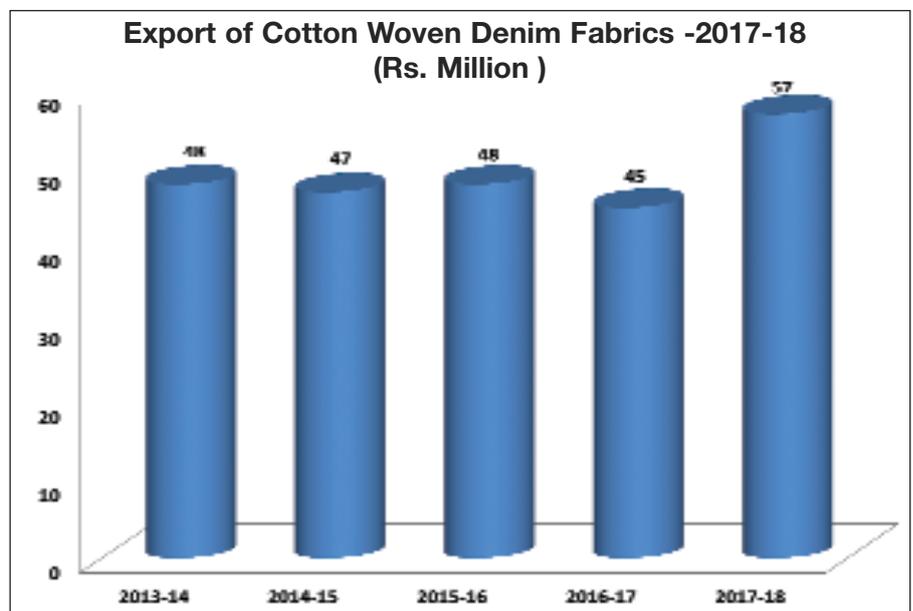
by Prof. Dr. Noor Ahmed Memon, Dadabhoy Institute of Higher Education.

Export of cotton denim fabrics from Pakistan increased from 363 million square metres worth Rs45 billion in 2016-17 to 434 million square metres worth Rs57 billion in 2017-18, thus showing an increase of 26% in terms of value. Bangladesh, Turkey, Egypt, Sri Lanka, Italy, Peru and Vietnam are the major markets for denim fabrics exports from Pakistan.

According to global market research firm Market Insights Reports, sales of the global denim fabric market are predicted to reach 9.13 billion metres in 2023, with a CAGR of 4.7%. The global denim fabric market was valued at US\$ 19.70 billion in 2018 and will reach US\$ 25.40 billion by 2025, growing at a CAGR of 3.2%.

On the other hand, the global denim fabric market was mainly driven by growing demand for clothing, household items and many other fields. In 2018, the market was led by China, India, Europe and North America. At present, the major manufacturers of denim fabric are concentrated in China and India.

Global denim jeans market valued approximately US\$ 4.47 billion in 2017 is



anticipated to grow at a healthy rate of more than 8.5% over the forecast period 2018-2025. The major driving factor of global denim jeans markets are rising disposable income of the individuals, surging e-commerce industry and increasing preference for wearing denim jeans.

Manufacturers are adopting the leading fibre technology that has enabled them to offer denim jeans products for at leisure and activewear besides the workwear and casual wear. The major restraining factor of global denim jeans markets are changes in consumer lifestyle & preference and the introduction of yoga pants and other active wear.

The denim jeans are a specific type of trousers which are made of denim or dungaree cloth. The denim jeans are one of the most significant parts of the clothing and apparel industry. Increasing

demand for denim jeans products is further expected to impact the global market growth of denim jeans positively.

There are many benefits of denim such as durability, cost effectiveness and style.

On the basis of product, the denim market has been categorised into jeans, jackets and shirts, dresses, and others, wherein others include tops and shorts. Of these, the market for jeans is expected to continue holding the largest revenue share, during the forecast period. This is attributed to the high demand for distressed and casual-wear globally.

Denim is now one of the key apparel sectors and the driving force behind the apparel exports of the country. The United States were the major denim producer throughout the years, but now with the emergence of the countries like China, India, Pakistan and Bangladesh, it

Table 1: Export of Cotton Woven Denim Fabrics

Year	Quantity (Million Sq M)	Value (Rs. Millions)
2012-13	326	46,707
2013-14	333	48,224
2014-15	316	46,920
2015-16	426	47,983
2016-17	363	45,394
2017-18	434	57,473

Source: Pakistan Bureau of Statistics

is evident that denim is not an American product anymore.

Pakistan's Role: Pakistan has become denim hub in the region in less than a decade and is considered one of the leading suppliers of quality denim fabric to the world's known brands for the garments.

Historically, local cotton was considered most suitable for manufacturing of denim fabric due to its low staple length catering to lesser count requirement; however, given the weakening in quality of the cotton crop, reliance on imported cotton of local players has increased.

Denim fabric has been developed and over the last few years; there is rapid growth and expansion in its use and production capacity in Pakistan. There are about 40 major players in the denim industry of Pakistan. Some of them, like Artistic Fabric Mills, Pak Denim Limited, Al-Ameen Denim Mills Limited, S.M Denim Mills Ltd, Denim International, Classic Denim, Rajby Industries, Soorty, etc. are producing more than 50 million square metres of finished denim fabrics monthly.

Supply of denim fabric from Pakistan is a specialised textile product with its diversified increasing use in jeans, fancy and fashion apparel, curtain, bed sheets, canvas, uniforms, fire-resistant apparels for all seasons and all ages.

Exports: There is a constant increase in the export of denim fabrics from Pakistan. Export of cotton denim fabrics increased from 363 million square meters worth Rs45 billion in 2016-17 to 434 million square meters worth Rs57 billion in 2017-18, thus showing an increase of 27% in terms of value. Exports of cotton

denim fabrics from Pakistan are given in **Table-1.**

Bangladesh, Turkey, Egypt, Sri Lanka, Italy, Peru and Vietnam are the major markets for denim fabrics exports from Pakistan. With about 212 million sq. meters of cotton denim fabric being exported to Bangladesh in 2017-18, it is a major market for Pakistan. Country-wise exports of cotton denim fabrics from Pakistan are given in **Table-2.**

The world's top denim fabric exporting country in 2018 was China while the top denim fabric importing country was Bangladesh. Mexico was the largest supplier of denim jeans to the USA while Bangladesh was the largest supplier of denim jeans to the EU. America tops the list of denim jeans users and an average estimate puts the figure at 450 million pairs a year. The top global denim fabric exporting countries are China, Hong Kong, Turkey, Italy, Pakistan India, Spain and Brazil.

Future Prospects

Currently, jeans are available in a variety of colors and styles to suit various consumer needs. Denim represents an evergreen fashion trend. Denim sales based on styles and fits are heavily

Table 2: Export Cotton woven Denim Fabrics
Quantity: 000 sq. Meters
Value: Rs. Million

Country	2016-17		2016-17	
	Quantity	Value	Quantity	Value
Bangladesh	211,773	26,857	200,206	24,245
Turkey	9,226	13,941	50,463	6,757
India	3,729	555	4,407	636
Italy	8,959	1,153	9,820	1,280
Vietnam	18,845	900	9,631	883
Hong Kong	1,943	291	3,185	308
Cambodia	5,390	768	7,103	886
Egypt	26,063	3,908	23,955	3,196
Sri Lanka	9,248	1,341	8,043	1,085
Mexico	2,899	431	3,289	426
UAE	3,318	499	4,719	647
Peru	8,014	1,032	4,425	571
Germany	1,408	201	2,004	228
Tunisia	1,163	153	1,789	215
Lesotho	1,582	246	3,907	515
Spain	2,438	347	1,364	176
China	2,768	396	1,345	192
All others	115,568	4,454	23,268	3,148
Total	434,334	57,473	362,923	45,394

Source: Pakistan Bureau of Statistics

dependent on street fashion and celebrity fashion trends. Growth in the market is influenced by economic, social and demographic trends.

The innovation remains critical to market growth and jeans have been reinvented from time to time over the last few decades. The manufacturers are focusing on newer designs, styles, and fit to suit changing consumer preferences and fashion trends.

The market situation does not allow the global players in the denim to increase consumer prices and therefore they have to absorb the price increases from denim fabric producers worldwide. In this scenario, Pakistan has emerged as a key supplier of this highly demanded fabric due to the competitive prices and in house innovations by the denim manufacturers in Pakistan.

References

1. Pakistan Bureau of Statistics.
2. State Bank of Pakistan-Annual Reports.
3. Trade Development Authority of Pakistan. ♦

