

Curtains & Furnishings

Sector Brief

The objective of this short write-up is to provide the reader with an overview of the sector. The information covers global trade of the product, status of Pakistan's exports and summary of industry structure. Trade information for global comparisons has been obtained from PC-TAS, International Trade Centre's Database. Latest available export data on Pakistan has been obtained from the Federal Bureau of Statistics, Pakistan.

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1. Introduction

Textile made-ups are one of the most valuable and important international trading commodities. In 1999 the international textile made-ups trade value was above US\$ 11 billion which can be divided into six major categories i.e. towel & cleaning cloths, bed wear & bed linen, blankets, curtains and furnishings, canvas products and table linen. Major exporters of textile made-ups include China, Pakistan, Turkey and Portugal exporting nearly 47% of the total international market of textile made-ups. Compared to previous years, the textile made-ups sector has had a slow growth rate of 3% for the last five years and 1999 was the worst year for textile made-ups products (3% decline in international exports) which is the only year with negative growth in last five years.

Pakistan being the second largest exporter of textile made-ups has increased its share in the international market from 6.6% to 10.1% in previous five years by earning a foreign exchange of US\$ 1.18 billion in 1999 and an average growth of 15% per annum. According to Federal Bureau of Statistics data, Pakistan exports for the year 2000-01 were about US\$ 1.3 billion.

2. Global Trade of Curtains

Curtains and its allied products constitute an important sub-sector of textile sector. In made ups, the curtains sub-sector is the third largest in terms of production and exports and accounted for 16.81% of total textile made-ups market in 1999. Its share has declined from 17.10% as a sub category but has grown by 3% per annum if total exports are analyzed from the last five years i.e. 1995-99. 1999 was the worst year for curtains and furnishings as the market declined by a high percentage value of 11%.¹

Table 1:

Value in \$ million					
World Exports					
	1995	1996	1997	1998	1999
WORLD	1786	1943	2045	2205	1962
Growth % age		9%	5%	8%	-11%

Curtains exports can be subdivided into three categories i.e. Curtains & interior blinds, bedspreads and other furnishing articles that are not specified. In 1999, the export market of curtains and interior blinds was \$856 million which accounted for 44% of the total curtain exports. Bedspreads constituted 14% of the curtain exports while the rest were claimed by curtains not elsewhere specified.

¹ World trade of curtains is reported under different SITC codes. For the purpose of analysis, all these codes have been summed together to get the overall picture of the world's trade of curtains.

Table 2:

Value in \$ million							
World Exports Category-wise							
Commodity	Code	1995	1996	1997	1998	1999	% Share in 1999
(Aggregate)		1786	1943	2045	2205	1962	100%
Curtains, interior blinds	65851	643	681	728	814	856	44%
Bedspreads	65852	378	402	399	375	281	14%
Furnishing articles, nes	65859	765	860	918	1017	826	42%

India is the top exporter of curtains and furnishing as a whole and exported 24.61% of the curtains market in 1999. Mexico which had 19.88% of the export share had a phenomenal growth of 52% per annum in previous five years while China, capturing 12.77% of curtain and furnishing market was the third largest exporter..

Table 3:

Value in \$ million						
Major Exporters						
	1995	1996	1997	1998	1999	% Share in 99
INDIA	482	561	541	511	483	24.61%
MEXICO	78	95	129	201	390	19.88%
CHINA	213	193	202	250	250	12.77%
TURKEY	142	151	214	223	244	12.46%
ITALY	98	99	89	101	95	4.83%
GERMANY	82	84	89	98	94	4.77%
PORTUGAL	54	52	62	73	71	3.64%
Other	637	708	718	748	334	17.04%

U.S.A. has been the largest importer of curtains and furnishing for the last five years and shared 26.81% of total imports of 1999 valued at US\$ 541 million. USA export growth in terms of value has increased by 17.7% per annum in last five years. Germany was second, with nearly 12.11% of world imports of curtains and furnishings.

Table 4:

Value in \$ million						
Major Importers						
	1995	1996	1997	1998	1999	% Share in 99
USA	292	270	326	404	541	26.81%
GERMANY	230	228	220	243	244	12.11%
UNTD KINGDOM	78	101	123	158	177	8.78%
FRANCE	93	89	103	120	147	7.30%
JAPAN	131	136	111	92	113	5.58%

3. Pakistan:

In 1999 curtains & furnishings accounted for \$57.6 million in foreign exchange earnings, which was nearly 4.86% of total textile made-ups exports of Pakistan. The share has increased from 2.78% that shows that Pakistan exports of textile made-ups as a whole has not increased with a greater rate than exports of curtains & furnishings. In Pakistan, the curtain & furnishings market has increased by an annual average of 35% in last five years, with negative growth in 1998 of 3%, while there was a high growth rate in 1996 and 1999 i.e. 78%

and 45% respectively. Looking at the international perspective, Pakistan share of the total curtain market has increased from 1.07% in 1995 to 2.94% in 1999.

Table 5:

Value in \$ million					
Pakistan Exports					
Years	1995	1996	1997	1998	1999
Value	19.16	34.16	40.88	39.75	57.65
Growth % (Value)		78%	20%	-3%	45%

For international comparisons the data used is for the year 1999. However, data is also available for Pakistan for the year 2000-2001, which shows that there has been an increase in exports from \$57.65 million to nearly \$71.15 million in 1999-2000 and then it declined to \$65.81 million in 2000-01.

Some of the leading importers from Pakistan include U.S.A., which imported 60.4% of Pakistan's curtains and furnishings, UK, which imported nearly 5.30% and Germany, which shared 4.55% of the Pakistan exports of curtains and furnishings in 1999.

Table 6:

Value in \$ million				
Pakistan Major Partner				
Country	1998	% Share	1999	% Share
UNITED KINGDOM	20.8	52.39%	25.9	44.99%
USA	4.6	11.69%	8.7	15.06%
GERMANY	2.8	7.06%	7.9	13.64%
FRANCE	1.7	4.18%	3.3	5.79%
BELGIUM	0.9	2.38%	2.5	4.25%

Looking at the break-up of Pakistani curtain exports, it has been found that about whole of the total value exported is accounted for by just one category which is 'Curtains and interior blinds' i.e. 94% of the total curtains and furnishings exports. This is in line with the world trend since this category is the largest category in the global exports with a share of 44%.

Table 7:

Value in \$ million			
Pakistan Export Mix		2000-01	1999-2000
Commodity	PSTC Code	C-Value	C-Value
Curtains, interior blinds	65851		
Cotton Curtains Mill-made	6585101	44.01	46.48
Cotton Curtains Hand Loom	6585102	0.08	0.03
Synthetic Curtains Mill-made	6585103	14.79	14.29
Synthetic Curtains Hand Loom	6585104	0.08	0.3
Curtains of other textile	6585109	3.3	5.23
Bedspreads	65852		
Knit Bedspreads	6585201	0.09	0.55
Other Bedspreads	6585202	0.54	0.65
Furnishing articles, nes	65859		
Cushions	6585901	2.77	3.26
Mosquito nets	6585902	0.08	0.1
Furnishing Articles nes	6585909	0.06	0.26
Total		65.81	71.15
Exchange Rate RS/US\$ 51.8 1999-2000			
Exchange Rate RS/US\$ 58 2000-01			