Cotton - Textile -Apparel

Value Chain Report Mauritius

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GLOSSARY OF ABBREVIATIONS

ACP	African, Caribbean and Pacific States
AGOA	Africa Growth and Opportunity Act
CDRC	Corporate Debt Restructuring Committee
CET	Common External Tariff
CMT	Compagnie Mauricienne de Textile Ltd
COMESA	Common Market for Eastern & Southern Africa
EAC	East Africa Community
EPZ	Export Processing Zone
EU	European Union
FDI	Foreign Direct Investment
FTA	Free trade area
IOC	Indian Ocean Commission
IVTB	Industrial and Vocational Training Board
JEC	Joint Economic Council
MEDIA	Mauritius Export Development and Investment Authority
MEPZA	Mauritius Export Processing Zone Association
MFN	Most favoured nation
MIDA	Mauritius Industrial Development Authority
PICT	Policy Intervention Committee on Textile
RATES	Regional Agricultural Trade Expansion Support Programme
SADC	Southern African Development Community
TEST	Textile Emergency Support Team
WTO	World Trade Organisation

1.0 INTRODUCTION

Because of these limited resources, the Mauritian economy is bound to be outward-oriented. In fact, its economic growth during the last 25 years has mainly been based on export-oriented activities (The export Processing Zone and Sugar) and the services sector (Tourism). Economic development in Mauritius is a non-starter when left to its reduced internal market size. Interaction within and outside of the region is therefore vital. One of the major reasons for the country's success has been the fact that by taking advantage of the Lomé Provisions, Mauritius has been importing raw material and exporting finished products with duty free access to the European market. In view of the upcoming liberalised world economy and the dismantling of existing trade preferences (Cotonou-MFN), Mauritius has been looking at the region both in terms of market and also as a potential source of imports. It is not a coincidence that Mauritius has been a founding member in most of the regional organisations namely the IOC, COMESA and the Indian Ocean Rim. Mauritius has also signed the SADC Protocol on Trade in 1996 and subsequently ratified it. Being an active member in these organisations, Mauritius is committed to implement free trade policies in the region to enable further economic development.

For Mauritian decision makers, regional integration is therefore considered as instrumental in enabling further economic development and international competitiveness. The Mauritian government feels that regional integration does increase market size, even if it represents the integration of small economies. In addition to economic gains, Mauritius is also using the regional organisations as a platform for the present international negotiations at the WTO and for the Cotonou Agreement.

Mauritius is one of the few countries in the region that has been closely monitoring the regional integration process and has been in involved in the negotiation processes for the setting up of the trade regimes both with the public and the private sector. The private sector institutions in Mauritius are well aware of the opportunities that are being offered under regional groupings such as COMESA, IOC and SADC.

Despite political efforts, the level of intra regional trade between Mauritius and the ESA region has been quite timid. For instance, trade with COMESA and SADC together represents 12 % (ESA imports represent 16% while exports represent 5%) of the total trade respectively. The percentage with SADC is relatively significant because of the dominance of South African imports (12% of the total imports) in Mauritius. The ESA region is however still not a major trading partner compared to the rest of the world. Competitive products from other sources tend to prevent faster growth of intra regional trade. Furthermore factors such as the existence of a number of tariff and more so non-tariff barriers, business ethics, lack of confidence in the operators and unsuccessful experiences are still considered as constraints to intra-regional trade.

During the last 10 years a wide variety of products have been exported to the region however textile and garments products were not among the main items. The textile sector in Mauritius has mainly focussed on the EU market because of free access and also the high returns compared to other markets. In fact, conditions under the LOME Trade provisions, which have triggered economic growth in this sector, allowed the use of inputs from third countries provided that the processes complied with the EUR1 rules of origin. Inputs in this sector were mainly sources from Asia and the finished products were meant for Europe and the US markets (Multifibre agreements). It is only recently with new opportunities offered under the Africa Growth and Opportunity Act (AGOA) that operators saw the ESA region more as an opportunity for trading inputs in the textile and yarn sector within the region in order to be able to export to the US markets. Countries like Mauritius who do not benefit from the third country fabric derogation under the AGOA have to look within the region for importing inputs to meet export requirements. Similarly this also creates opportunities for exporting other inputs from Mauritius to the ESA countries when the third country fabric is no longer applicable, hence the setting up of spinning plants in Mauritius.

The textile and garments sector in Mauritius is, however, at crossroads. Despite the fact that the government and the operators were aware of the phasing out of the LOME trade provisions and the dismantling of the Multifibre agreements and that counter measures were initiated some 15 years ago, the future of this industry does not look very bright. A number of manufacturers (mainly those who have not restructured themselves) are closing down. The main arguments are that the cost of labour and that of utilities are quite high and that the productivity rate is too low. The textile and apparel industry will still play an important role in the next 5-6 years but operations will be significantly reduced compared to the present situation. The actions that could be initiated by the government seem to be limited as this industry is very price elastic. One of the hopes to maintain a sustained development for the Mauritian textile and apparel sector is that the lobby for Mauritius' eligibility for third country fabric derogation is successful.

On the regulatory side, the government has provided quite a number of incentives in this sector. Considering the opening up of opportunities in the region, the Mauritian Government has even provided tax incentives to Mauritian business operators to invest or relocate in the region.

On one hand, the current situation in this sector is related to the external environment, which does not favour further development in the textile and apparel sector. On the other hand, the scope for sustained development in the Mauritian textile sector will greatly depend on a number of factors which are the willingness of companies to modernise rapidly, the capacity for companies to adapt to change, the lobby carried out at the AGOA level for the third country fabric derogation, and the outcome of the ACP-EU negotiations.

This study aims at providing data and information on the cotton and textile sector as an input to the RATES/COMESA/EAC/SADC effort of developing a trade policy framework in support of regional and extra regional trade in cotton and textile from ESA region.

2.0 BACKGROUND

2.1 Evolution of the sector

2.1.1. The beginning of the EPZ

The Mauritius Export Processing Zone (EPZ) was launched in 1970 with only 5 enterprises. It has been a great achievement and has been one of the main engines of economic development in Mauritius. From 5 enterprises in 1970, the EPZ has grown to 506 enterprises in 2003. Since the mid-1980s, the whole of Mauritius has been designated as part of the EPZ.

The EPZ provided a special area outside the nation's normal customs barriers within which investing firms enjoyed favoured treatment regarding:

- Intermediate goods, equipment, raw materials and technology
- Company taxation
- The provision of infrastructure and
- Freedom from industrial regulations applied elsewhere in the economy.

Firms were able to take advantage of these special incentives, provided all finished products were exported, and imported goods fully utilised within the zone or re-exported. From the outset, the main sector has been clothing. Output was mainly labour-intensive 'basic' garments at first. The largest market at that time was France, and the US.

2.1.2. The 1980s

The Mauritian clothing industry first grew to a significant size in the mid- and late-1980s, with employment increasing from less than 20,000 (1982) to 77,000 (1988). Investment was mainly from Hong Kong-based companies who were interested in cheap labour and having access to quota-free and subsequently, quota allocations - for the US (and to a lesser extent the EU) market. Sixty five percent of all equity of clothing sector enterprises set up in Mauritius during the period 1983-85 was Hong Kong owned. From 1984 onwards, changes in US Rules of Origin legislation led to a further outflow of Chinese capital from Hong Kong, some of which was attracted to Mauritius.

Both in the late 1980s and subsequently, the great bulk of Mauritian exports for the US market were manufactured by plants of Hong Kong, Singaporean and Taiwanese groups on the basis of cut, make and trim (CMT). Two large groups, Esquel and Novel established a presence on the island.

During most of the 80s, Far East Asian-owned plants were the most important source of exports for the EU market. However in the late 1980s, there was a steady increase in the proportion of exports from locally-owned enterprises, some of which started to integrate backwards into wool spinning, fabric knitting, dyeing, etc, in order to take advantage of the Lomé Convention. However, the rapid expansion of local small-scale CMT enterprises also led to a decline in productivity.

2.1.3 The EPZ in the 90s

In the 1990s, expansion led to a situation of almost full employment, which in turn led to large increases in wages (over one third in real terms between 1990 and 1992 alone). Many locally owned companies, especially small ones, closed down or were absorbed by their former local CMT contractors. As wage costs rose, new FDIs in Mauritian clothing virtually ceased. The 1990s witnessed the increase in demand for steady improvements in garment quality by EU and US buyers. Demands for shorter lead times also increased.

Hong-Kong owned firms exporting to the US market sought more internal efficiency during the early 1990s. This led to the introduction of foreign workers whose percentage of workforce in textiles increased from 1.8% in 1992 to 8.8% in 1994. There was also diversification into non-sweater items such as denim, cotton shirts, etc to take advantage of quota availability, and also specialisation in manufacture of important US private labels and brands.

Far Eastern Asian-owned firms producing for the EU market pursued similar strategies of diversifying into non-sweater items, but were less successful. The level of backward integration increased further, hence reducing the imported content in Mauritian exports.

From 1995 to 2000, helped by better efficiency and a decline in local real costs due to the USD depreciation (which was more than the inflation rate), firms exporting to the US consolidated their status as suppliers to well-known brands and private labels.

During the same period, faced by serious problems, firms producing for the EU market had to undertake new investments, increase quality and increase their portfolio of clients to include chain stores and sportswear brands. However, the upgrading of customer portfolios involved mostly the basics, but some differentiation in terms of fancy garments in sweaters had to be carried out. The demand for fancy garments came from partial redirection towards more expensive EU countries.

At the same time, large numbers of Mauritian suppliers sought to strengthen their foothold in classic and highly labour-intensive basics by shifting a large part of their production to Madagascar, where wage costs are 18% to 25% lower. It was mostly CMT production for some manufacturers, while for others sourcing of fabrics was done from Madagascar itself, especially in the case of woven types.

By the end of the 90's, however, the Textile and Clothing sector went into a decline with a gradual decrease in growth and exports, closures of enterprises and loss of employment. More recently the phasing out of the Multifibre agreement in December 2004 as well as the end of preferential agreements with the EU is creating greater opportunities for competitors such as China, India and Pakistan to take over a large share of the Mauritian export markets. Increasing labour costs, utility costs and freight costs relative to Asian competitors have contributed to eroding cost-competitiveness. The high interest rates and the appreciating Mauritian rupee have also not favoured the sector.

The table below shows the evolution of the EPZ sector, which is dominated by the textile and garment industry. The trend from 2001 shows a decline in the number of enterprises and a greater drop in the employment level. In US dollar terms, the level of exports has slightly decreased from 1998 to 2002 followed by a slight increase in 2003. The figures also indicate that the share of the EPZ decreased from 12% in 1998 to 10% in 2003. The growth rate is also on a downward trend from almost 7% in 1998 to –4% in 2003. Consequently, based on the above declining situation, new FDI has not been significant over the 1998-2003 period.

Table 1: Main Economic indicators 1990-2003 (US$). EPZ Sector

	1998	**1999**	**2000**	**2001**	**2002**	**2003**
No of enterprises as at December	495	512	518	522	506	506
New enterprises	48	37	34	24	9	23
Closures	33	20	28	20	25	23
Employment as at December	90,116	91,374	90,682	87,607	87,204	77,623
Net change	+ 6,725	1,258	(652)	(3,075)	(403)	(9,851)
Employment Growth rate (%)	+ 8.1	+ 1.4	(0.8)	(3.4)	(0.5)	(11.0)
No. of expatriates					16,918	15,392
Exports (f.o.b. US$ Million)	1,134	1,157	1,104	1,107	1,104	1,149
Imports (c.i.f. US$ Million)	704	625	585	563	571	558
Raw Materials	639	552	524	514	515	504
Machinery & Spare parts	65	73	61	49	56	54
Net Exports (US$ Million)	430	532	519	544	533	591
Net Exports to Exports (%)	38	46	47	49	48	52
Value added at current prices	457	464	447	449	462	482
Share in Manufacturing (%)	50	52	51	51	49	46
Share in GDP (%)	12	12	12	12	11	10
Growth rate (%)	+ 6.9	+6.0	+6.0	+ 4.4	(6.0)	(4.0)
Investment (US$ Million)	63	70	61	56	50	58
Machinery & Spare parts	59	65	56	45	49	54
FDI	1.17	11.91	0.29	0.10	1.38	1.94

Source: ***Central Statistical Office***

The Mauritian government has recognised the urgent need for restructuring in the sector and is making efforts to support the industry. Various measures have thus been taken by government to maintain the competitiveness of the industry.

3.0 SUPPLY and DEMAND ANALYSIS

3.1. The Spinning Sector

The spinning sector in Mauritius comprises two categories of activity. The first one consists of spinning of woven products for the manufacture of shirts, trousers and denim jeans, and the second one for woollen products including pullovers, cardigans, etc. For the woven products sector, there is only one company that produces yarn in Mauritius, namely, Arvind Spinning Mills (Mtius) Ltd. Regarding knitted products there are three operators, two of which (Ferney Spinning Mills Ltd and Independent Spinning Mills Ltd) produce woollen yarn, while the third one, Tianli Spinning (Mtius) Ltd, produces cotton for knitted T-shirts, Polo shirts, etc.

In the absence of official statistics on the industry's installed and utilised capacity, it has been estimated with available figures during interviews that the total installed capacity of woven spinning in Mauritius is 5,400 tons per annum. According to the operators, the used capacity is around 80%. The sector is not planning any expansion due to availability of excess capacity at present. Reasons, which explain this under utilisation, are mostly due to seasonal fluctuations of orders and also to the lack of available skilled labour in this area in Mauritius.
The total installed capacity for woollen spinning is 3000 tons per annum and on average the industry is running at 75% of its capacity. The unused excess capacity is due to the fact that the pullover sector has been facing a number of closures in the last two years, because of increasing production costs. The manufacture of pullovers is highly labour intensive and is limited in its capability to mechanise. Hence, increases in unit labour costs have led to a drop in competitiveness resulting in a sizeable drop in the demand for wool.

In the cotton-knitting sector, which is dominated by the manufacture of yarn for T-shirts, the production capacity of yarn per annum is 2,500 tons and the sector is running at full capacity. Demand for finished products made out of cotton yarn is very high in Europe, and especially under AGOA, where exported goods from Mauritius can benefit from duty free access on the condition that the yarn used in manufacturing is sourced from Sub Saharan Africa. The sector is increasing its capacity to 8000 tons per annum this year and is doing so with a view to exporting to the region. According to operators, it is expected that the demand for yarn in the ESA region will increase in the coming years to enable apparel-manufacturing plants to benefit from export advantages under AGOA. Despite the fact that these countries can benefit from third country fabric derogation, Mauritius represents a cheaper source of products and also reduces delivery time taking into account the reduced distance.

Table 2 gives an indication of the level of imported cotton lint to Mauritius in 2003. As shown, the percentage of imported cotton from the region represents only 15% both in volume and value terms for both non-carded or combed and carded cotton. The main sources are Madagascar for non-carded and combed cotton and South Africa for carded or combed cotton. The total market for cotton lint in Mauritius (non-carded and combed) is US$16.2 million and (carded and combed) US$2.7 million based on 2003 figures.

Table 2. Import of Cotton Lint in Mauritius

HSCODE	DESC	COUNTRY	QTY (Kgs)	CIF (US$)
52010000	Cotton, not carded or combed.	Zambia	38,461	52,473
52010000	Cotton, not carded or combed.	Madagascar	1,187,962	1,696,391
52010000	Cotton, not carded or combed.	Mozambique	368,769	556,445
52010000	Cotton, not carded or combed.	Uganda	101,262	144,745
	TOTAL Cotton, not carded or combed imported from the region		**1,696,454**	**2,450,053**
	Regional imports as a % of total imports		15%	15%
	TOTAL Cotton, not carded or combed imported		**11,646,397**	**16,218,105**
52030000	Cotton, carded or combed.	South Africa	165,786	407,649
	Regional imports as a % of total imports		16%	15%
	TOTAL Cotton, carded or combed imported		**1,055,399**	**2,720,225**

Source: Central Statistical office

3.1.1 Policies related to the Spinning sector

For the last three years, the Mauritian government has tried hard to stimulate investment in the cotton-spinning sector. The diversification of export markets and tapping such a large market as the USA created interesting opportunities. The fact that Mauritius was one of the countries not benefiting from third country fabric derogation encouraged Mauritian manufacturers to be vertically integrated so as to benefit from preferences under AGOA. As a strategy to give a boost to investment in this sector, the Mauritian government set up various schemes for the spinning sector.
Incentives include:
A special tax credit of up to 60% of the equity invested has been introduced as a fiscal incentive to encourage investment in spinning plants.
Provision has been made to provide land lease at highly concessionary rates.
With a view to increasing investment and stimulating employment, the government has also set up a National Equity Fund. The objective of this fund is for the government to subscribe to the equity capital of new ventures in cotton spinning and to participate in the equity capital of existing enterprises in the textile and clothing sector that have credible business plans for expansion or restructuring.

3.1.2 Issues/Constraints in the spinning sector

Spinning companies especially in the woollen category have been having difficulties with closures of numerous pullover producers. This has been mainly due to the loss of competitiveness of pullover companies in Mauritius. The pullover sector is labour intensive and with unit labour cost rising every year, pullover companies have been experiencing lower margins and even losses. This resulted in many pullover companies (especially foreign owned ones), closing down. Sales of yarn in the spinning sector have therefore been decreasing as a consequence of low prices. Companies also indicated that there is a significant shortage of Mauritian skilled operators and that the productivity of operators is not improving. Labour statistics from the Central Statistical Office show that labour productivity in the textile and clothing sector has been declining since 2001.

Other factors in the spinning sector, which have affected production costs as well as competitiveness, are high utility costs such as cost of electricity, water and wastewater. As an example, the table below shows comparative costs of electricity (available only for 1999) for different countries. The figures indicate that the cost of electricity in Mauritius was much higher than in Asian countries and South Africa.

Table 3. Comparative Electricity Prices (US$ per kilowatt hour)

Countries	**1999**
Mauritius	0.073
South Africa	0.015
Malaysia	0.057
Taiwan	0.058
Belgium	0.055

Source: World Competitiveness Yearbook 2000, CEB Annual Report

The cost of utilities definitely has an impact on the international market for low quality yarns. Mauritian yarn manufacturers find it very difficult to match Chinese products at very competitive prices.

The high investment cost for such initiatives as well as the lack of financial instruments offered by the Mauritian government has also taken its toll on investment in the spinning sector. The conditions in the existing National Equity Fund are quite rigid (the required rate of return on investment is 15%) which according to the operators is unrealistic given the prevailing market conditions. As an example, the Star Knitwear group as well as the Palmar Group (Fuel Sanghi joint venture) were both planning to be vertically integrated so as to be able to take full advantage of AGOA. However, due to high investment costs and not expecting to meet the conditions of the National Equity Fund, the projects did not go ahead.

3.2. The Textile Sector

3.2.1 Weaving

The weaving sector comprises two categories of products, woven denim fabrics for jeans and woven fabrics for shirts, trousers, etc. There are two weaving units for denim fabrics, which are Denim de l'Ile (ex- Novel Textiles) (a partnership of Mauritian and Italian investments with World Knits Ltd and Italdenim respectively) (Italian investments) and Arvind Overseas (Mtius.) Ltd, (Indian owned firm). For woven fabrics used by apparel companies for manufacturing shirts, trousers, etc, there are two companies operating in Mauritius, namely Socota Textile Mills Ltd (Malagasy Investments) and Consolidated Fabrics Ltd (a Mauritian company).

Based on some calculated data obtained from the operators, it has been estimated that the total installed capacity of the weaving sector for denim in Mauritius is around 16 million square metres per annum. The used capacity is 100%. The sector is planning expansion in the near future to cater for increasing demand from local apparel companies as well as regional producers, namely from Madagascar.

In the woven fabrics sector, it is estimated that the installed capacity is around 20 million square metres and the used capacity is around 97% according to the operators interviewed. However, the industry is not planning any expansion, due to the fact that unit labour costs and utility costs have been continuously rising and profit margins have been relatively low. However, some companies are upgrading machines for better productivity and quality.

3.2.2 Knitting

Most of the knitting companies in Mauritius are vertically integrated, which implies that they knit fabrics from yarn purchased locally or imported. These fabrics are then used to manufacture their own products. There are about 85 integrated knitting companies in Mauritius. They can be grouped in two main categories, fine knits, that is the production of T-shirts, Polo shirts, etc, and heavy knits, also known as threader knits, for the production of pullovers, etc.

Heavy knits

The largest manufacturers in this sector are:

- Floreal Knitwear Ltd
- Shibani Knitting Co. Ltd
- Southern Textiles Ltd

These companies account for about 65% of the total volume of pullovers produced in Mauritius.

Pullover companies purchase about 75% of their yarn locally and import about 25%. The companies then knit the yarn into fabrics for their own use. The installed capacity for this sub sector is approximately 25 million square metres of fabric. On average, the industry is running at 85% capacity and is not planning to expand due to the various constraints indicated above (high production costs and lower profit margins). The main reason for under utilisation of the existing capacity is the falling demand mainly as a result of the loss of competitiveness of Mauritius products as compared to low cost producers in Asia.

Fine knits
In this category the three main companies are***:***

- Compagnie Mauricienne de Textile Ltd (CMT)
- Star Knitwear Ltd
- Tropic Knits Ltd

These companies account for about 55% of the total volume of fabrics produced in Mauritius. The installed capacity for this sub sector is approximately 125 million kg. of fabric. On average, the industry is running at 100% capacity and is continuously expanding to meet growing demand in that sub sector which is still considered as profitable.

Table 4. Production of fabrics from 1997 to 2003

	Woven		**Knitted**	
	Volume m^2 million	**Value US$**	**Volume m^2 million**	**Value US$**
1997	59.5	0.35	118.7	0.44
1998	65	0.39	110.9	0.42
1999	73.2	0.42	126.3	0.40
2000	78.8	0.40	152.7	0.40
2001	76.8	0.38	152.9	0.42
2002	76.1	0.41	148.5	0.40

Volume: Million Sq. Metres
Value: US$ (Finished products)

From the table above, it can be seen that for both woven and knitted sectors, the volume constantly increased up until the year 2000. After that, the country witnessed stagnation and eventually a decrease in production for both types of fabrics. This can be explained by the downward trend of Mauritian exports to the main export markets hence the impact on supply. Since 2000, due to international competition from Asian countries, local production costs have been at a disadvantage.

For example, Table 5 shows the cost of electricity and water in Mauritius for the years 2000, 2003 and 2004. It can be observed that the cost of utilities has risen between 20% and 60% during the last four years by an average of 30%, which according to the operators adds pressure on production costs.

Table 5. Cost of electricity water and wastewater in Mauritius (prices in US$)

	2000		2003		2004		Average Increase
Utilities							
Electricity Tariffs	**Low Voltage**	**High Voltage**	**Low Voltage**	**High Voltage**	**Low Voltage**	**High Voltage**	
Demand Charge per KVA US$	$2.64	$2.28	$3.48	$3.3	$ 3.44	$3.26	30%
Running Charge							
1st 250,000 kWh	$0.052/kWh	$0.046/kWh	$0.061/kWh	$0.059/kWh	$0.063/kWh	$0.060/kWh	
Additional Units	$0.047/kWh	$0.041/kWh	$0.053/kWh	$0.051/kWh	$0.055/kWh	$0.052/kWh	
Water Tariffs							
First 100 m3	$0.25/m^3		$0.37/m^3		$0.36/m^3		42%
Next 150 m3	$0.29/m^3		$0.44/m^3		$0.43/m^3		
All additional m3	$0.36/m^3		$0.59/m^3		$0.58/m^3		
Min. Charge/month	$6.14		$7.33		$7.25		
Waste Water Tariffs	$0.08/m^3		$0.44/m^3		$0.41/m^3		450%

These factors have led to a decrease in competitiveness and consequently lower levels of confirmed orders from clients. The number of factory closures is partly a result of these factors and this has also led to a number of Hong Kong based companies relocating to countries with lower production costs. Madagascar is a clear-cut example of this phenomenon.

3.2.3 Imports of Yarn form ESA and outside ESA region

The market for imported cotton yarn in Mauritius is estimated at US$20 million for a quantity of 8000 tons. The table below shows that the region caters for only slightly more than a quarter of the total imports of cotton yarn into Mauritius. Regional imports are dominated by South Africa who supplies almost 95%. South Africa is known for the high quality of its products. Suppliers from the rest of the world are India with 46%, followed by China 20% and Pakistan 4%. These sources as pointed out in this report have been known for years as reliable and cheap suppliers of yarn, which explains the reluctance of sourcing from the ESA region apart from South Africa.

Table 6 Imports of Cotton Yarn in 2003

HS Code	Description	Country	Qty (Kgs)	Cif (Us$)
51061000	Yarn of carded wool, not put up for retail sale, containing >=85% of wool	Madagascar	600	994
51071000	Yarn of combed wool, not put up for retail sale, containing >=85% of wool	South Africa	545	7,960
52041100	Cotton sewing thread, with >=85% cotton, not put up for retail sale	South Africa	13,086	74,187
52051100	Uncombed single cotton yarn, with >=85% cotton, nprs, <=14mn	Madagascar	58,912	210,429
52051100	Uncombed single cotton yarn, with >=85% cotton, nprs, <=14mn	Zambia	49,632	81,863
52051100	Uncombed single cotton yarn, with >=85% cotton, nprs, <=14mn	South Africa	1,991,186	4,966,710
52071000	Cotton yarn (excl. sewing), put up for retail sale, with >=85% cotton	South Africa	2,170	17,682
	Total Yarn Imported from the region		**2,116,131**	**5,359,823**
	Regional imports as a % of total imports		**26%**	**27%**
	Total import of yarn		**8,032,110**	**19,970,200**

Source: Central Statistical office

3.2.4 Imports of Fabrics from ESA and outside ESA region

According to the required HS codes 5208 to 5212, the amount of fabric imported into Mauritius amounts to US$ 1.1 million for a volume representing 217 tons. Table 7 below indicates that the main sources for these products are Pakistan, Madagascar and Italy representing 56%, 25% and 5% respectively. Importing from Madagascar is partly due to trade between sister companies and also due to the fact that the quality and price are quite competitive for Mauritian companies. Other preferred sources such as Pakistan and Italy are due to them being known as traditional suppliers of fabrics. The reasons why local companies do not source in the region have been discussed above and are related to absence of knowledge of regional suppliers except the main ones, reliability of logistics and quality.

Table 7. Import of fabrics in Mauritius

HSCODE	DESC	Country	QTY (Kgs)	CIF US$
52081100	Unbleached plain cotton weave, with >=85% cotton, =<100g/m2	Madagascar	6,655	70,906
52081100	Unbleached plain cotton weave, with >=85% cotton, =<100g/m2	Italy	1,135	45,417
52081100	Unbleached plain cotton weave, with >=85% cotton, =<100g/m2	Austria	1,023	23,620
52081100	Unbleached plain cotton weave, with >=85% cotton, =<100g/m2	India	1,272	14,615
52081100	Unbleached plain cotton weave, with >=85% cotton, =<100g/m2	Pakistan	2,357	9,180
52081100	Unbleached plain cotton weave, with >=85% cotton, =<100g/m2	Portugal	135	5,867
52081100	Unbleached plain cotton weave, with >=85% cotton, =<100g/m2	Hong Kong	410	2,256
52081100	Unbleached plain cotton weave, with >=85% cotton, =<100g/m2	Turkey	53	1,957
52081100	Unbleached plain cotton weave, with >=85% cotton, =<100g/m2	France	31	316
52081100	**Unbleached plain cotton weave, with >=85% cotton, =<100g/m2**		**13,071**	174,135
52091100	Unbleached plain cotton weave, with >=85% cotton, >=200g/m2	Madagascar	3,980	17,288
52091100	Unbleached plain cotton weave, with >=85% cotton, >=200g/m2	Italy	1,160	11,009
52091100	Unbleached plain cotton weave, with >=85% cotton, >=200g/m2	India	1	45
52091100	**Unbleached plain cotton weave, with >=85% cotton, >=200g/m2**		**5,141**	28,343
52111100	Unbleached plain cotton weave, with <85% cotton, >200g/m2	Pakistan	125,480	644,500
52111100	Unbleached plain cotton weave, with <85% cotton, >200g/m2	Madagascar	45,548	208,963
52111100	Unbleached plain cotton weave, with <85% cotton, >200g/m2	Thailand	13,944	60,332
52111100	Unbleached plain cotton weave, with <85% cotton, >200g/m2	France	12	141
52111100	**Unbleached plain cotton weave, with <85% cotton, >200g/m2**		**184,984**	913,937
52121100	Unbleached woven fabrics of cotton, =<200g/m2, nes	China	12,404	45,200
52121100	Unbleached woven fabrics of cotton, =<200g/m2, nes	India	931	2,686
52121100	Unbleached woven fabrics of cotton, =<200g/m2, nes	Italy	17	1,261
52121100	**Unbleached woven fabrics of cotton, =<200g/m2, nes**		**13,352**	49,147
				-
	Total Woven fabrics		**216,548**	**1,165,561**

3.2.5 Exports of fabrics from Mauritius

The analysis below is based on domestic export figures available from the Central Statistical Office. Due to a large variety of different products, exports of fabrics from Mauritius have been grouped in three main product categories as shown in the table. The first category consists mainly of unbleached cotton fabrics with >=85% cotton, >=200g/m2. This category accounted for 23 % of the volume exported in 2003 and the main export destinations were Malta, Kenya and Madagascar, which represented 21%, 22% and 24% in terms of volume.

The second category consisting of Denim fabrics is the dominant export product and represents 71% of the volume and 59% of the value in US$. Fabric was mainly intended for Madagascar 19%, South Africa 14% and Turkey 11%. These countries are also huge manufacturers of jeans. However some of the denim manufacturers are also experiencing high production costs, which is eroding the competitive edge of their product.

The third category of product represents mainly coloured and bleached cotton fabrics. It accounted for only 6% in volume and 15 % in value terms, which indicates a higher value added product compared to the other categories.

Table 8 Exports of fabrics from Mauritius in 2003

Products by HS Code range	**Volume (Kgs)**	**% of Total**	**Fob (US$)**	**% of Total**
5208-5209	1,658,209	23%	6,945,066	26%
520942 Denim, with >=85% cotton, >=200g/m2	5,048,521	71%	15,783,393	59%
520949-5212	392,972	6%	4,117,512	15%
Total fabrics imported	**7,099,702**		**26,845,971**	

Source: Calculated from CSO figures.

The export of cotton fabrics represents a greater volume of transaction but with slightly declining figures from 2000 to 2003. In value terms the export figure shows a decrease from US$35 million to US$ 27 million in 2003 with a peak in 2001. As figures show in the table above, the share of export to the region is also important averaging almost 60% of the total exports. Among the different kinds of fabrics the dominant exports consist of denim (almost 80% of the volume representing US$ 14.5million), which is exported to Madagascar, Zimbabwe, South Africa and Kenya. Exports of denim to the rest of the world are Italy, Malta and Turkey. Regarding the other type of fabrics, regional destinations for exports have been mainly Madagascar. Important volumes also went to Zimbabwe, South Africa and Kenya. Export of fabrics to the rest of the world included countries such as Malta, Sri Lanka, India and China. In terms of market share exports to the region have been decreasing compared to the rest of the world.

3.2.6 Issues/constraints in the textile sector

Export of domestically produced yarn

The export level for domestically produced yarn is relatively low due to the fact that large scale spinning activity is relatively new to Mauritius. The total volume of exports amounts to 166 tons representing US$1.1 million. The majority of it is exported to the ESA region mainly to Madagascar and South Africa. In fact companies who are involved in spinning are those who are already vertically integrated. At the moment, most of the yarn produced is used by the local weaving companies, such as Socota Textile Mills Ltd, Consolidated Fabrics Ltd, and Denim de L'ile Ltd. Weaving companies feel that yarn produced domestically is advantageous because of better prices and the reduced delivery times compared to imported yarn. The policy of encouraging the setting up of local spinning companies is in line with the strategy of providing the local market as well as exploring opportunities for the regional (mostly ESA countries) markets especially under the AGOA trade regime.

Table 9. Exports of Cotton Yarn in 2003

Hs Code	**Description**	**Country Of Destination**	**Quantity**	**US$**
52052100	Combed single cotton yarn, with >=85% cotton, nprs, <=14mn	BOTSWANA	7,530	21,357
52052100	Combed single cotton yarn, with >=85% cotton, nprs, <=14mn	MADAGASCAR	16,933	96,282
52052300	Combed single cotton yarn, with >=85% cotton, nprs, >43mn but <=52mn	MADAGASCAR	35,114	357,864
52052600	Single yarn of combed fibres between 125 decitex and 106.38 decitex	MADAGASCAR	122	220
52054200	Combed cabled cotton yarn, with >=85% cotton, nprs, >14mn but <=43mn	MADAGASCAR	12	354
52054600	Multiple or cabled yarn measuring more than 106.38 decitex	MADAGASCAR	255	1,620
52062500	Combed single cotton yarn, with <85% cotton, nprs, >80mn	MADAGASCAR	5,029	43,691
52079000	Cotton yarn (excl. sewing), put up for retail sale, with <85% cotton	MADAGASCAR	2,000	11,839
52051100	Uncombed single cotton yarn, with >=85% cotton, nprs, <=14mn	SOUTH AFRICA	41,144	82,770
52052100	Combed single cotton yarn, with >=85% cotton, nprs, <=14mn	SOUTH AFRICA	19,848	55,348
52052300	Combed single cotton yarn, with >=85% cotton, nprs, >43mn but <=52mn	SOUTH AFRICA	38,583	422,659
52079000	Cotton yarn (excl. sewing), put up for retail sale, with <85% cotton	SOUTH AFRICA	36	232
	Exports of yarn to ESA countries		**166,606**	**1,094,235**
	Total exports of yarn		**176,212**	**1,137,220**

Source: Central Statistical office

Operators in the knitting sector are vertically integrated and use most of their fabrics for manufacturing their own products/garments. The level of exports is relatively low. The setting up of knitting units in the region would not affect them in any way. On the contrary, spinning mills in Mauritius could play the role of a regional supplier to knitting companies in the region and obtain yarn at cheaper prices and with shorter delivery times.

3.2.7 Issues/constraints regarding sourcing of yarn

The main problem in the sourcing of yarn from the domestic market is that the limited number of spinning firms cannot meet the high level of demand from both weaving and knitting companies. In the denim-weaving sector, there is only one supplier, Arvind Spinning Mills (Mtius) Ltd, while for the knitting sector, only Ferney Spinning Mills Ltd and Independent Spinning Mills Ltd produce woollen yarn. Tianli Spinning (Mtius) Ltd produces yarn only for fine knits.

Importing yarn from the ESA region would enable the final products manufactured in Mauritius to qualify for rules of origin (EUR1 and under AGOA) for exports to both Europe and the USA. One element of uncertainty raised by operators and institutions in that sector is that weaving companies could face lack of reliability in terms of delivery time, costs, quality, etc. One of the operators indicated that Asian suppliers are world renowned for their quality and prices. Shifting to ESA suppliers could take time and would probably depend on marketing efforts by ESA companies.

Other problems foreseen with imports from the region and elsewhere are related to logistics and freight constraints. Being away from the main sea traffic lines, the cost of freight between Mauritius and ESA countries is relatively high. Furthermore many operators in this sector complain about the inefficiency of most of the ports and the high handling costs. This has often resulted in increased freight costs and charges, which have taken their toll on the sector.

Yarn sourced from outside the region, although reliable, costs more due to high freight costs and does not meet the rules of origin requirements under AGOA. The lead-time for delivery is also increased due to the amount of time taken for shipping, especially when sourcing from Asia. Often, inefficient handling by port services increases delivery time of the raw materials. Another factor when sourcing from Asia is that minimum quantities have to be respected. Flexibility is reduced and smaller orders are prevented. Sometimes importers of yarn complain about slow administrative procedures in Mauritius at customs and especially health regulations (mainly in the case of wool), which cause delays.

3.2.8 Issue/constraints regarding sale of fabrics

Weaving and knitting units have been facing difficulties with the closures in the various sub sectors, such as pullovers, shirts and trousers. The consumption of fabrics has followed a downward trend since the year 2000. Consumption both in the knitting and weaving sectors has dropped due to the difficulties faced by the EPZ during that period.

Table 10: Volume of fabrics consumed (1997 - 2003)

	Volume in sq metres	
	Knitting	**Weaving**
1997	118.7	59.5
1998	110.9	65.0
1999	126.3	73.2
2000	152.7	78.8
2001	152.9	76.8
2002	148.5	76.1
2003	147.3	62.6

Source: MEPZA

Over the last few years, increases in costs of production, such as that of utilities and labour costs, have had an upward impact on prices for woven and knitted fabrics. This resulted in an increase in the cost of raw materials for apparel firms. Taking into consideration these factors and in view of foreseen opportunities under AGOA, the strategy adopted especially by apparel manufacturing firms in Mauritius was to integrate vertically. This process of vertical integration has caused a drop in the level of sales of knitting firms.

In the case of exports of fabrics, one of the major problems that have been reported by operators is the freight issue. The cost of freight has recently increased and according to the shipping companies, the main reason is a head office policy decision in relation to international economic climate. On the other hand there has also been an increase of charges with local forwarding companies. These combined effects have adversely affected the prices of exported goods especially in the textile sector where the operating margins are quite thin. In addition to the high freight costs, operators have also been complaining about handling problems at the port. Due to the development of high volumes of transhipment activities, Mauritian Port authorities have been prioritising that area instead of shipping lines working with the Textile industry. In order to comply with the conditions in the transhipment contract, the port authorities have been delaying the captive cargo movement, which included imports and exports for the textile and apparel industry. This definitely had an impact on deadlines regarding export orders. Operators also claim that over recent years the sea freight environment has been characterised by the creation of a cartel of shipping lines. According to the operators, this cartel has almost been monopolising the services of the port and arbitrarily increasing freight costs and charges. These elements have had serious impact on the export process.

3.3 The Apparel sector

3.3.1 Utilization and demand for Fabrics

In 2003, the wearing apparel sector consisted of 229 enterprises of which 195 represent garments other than pullovers. That sub sector employed more than 49000 workers. The apparel industry in that year consumed approximately 219 million square metres of fabrics. The trousers sub sector used more than 39 million square metres of fabric last year and represented 19% of fabric consumed. The Shirts and Pullovers sub sectors absorbed 23 million square metres and 21.6 million square metres of fabric respectively, representing 11% and 10% of total fabric utilised. The T-shirts sub sector is by far the largest consumer of total fabric with a share of 60%, representing 125.7 million square metres. Compared to the other sectors, the T-shirt sub sector is highly capital intensive. Companies such as CMT, Tropic Knits, and Star knitwear, who are the leaders in this area, have invested massively in newest technology machinery and production processes to enable them to produce effectively and more efficiently and thus export significant volumes.

Table 11 Use of fabrics by products category in 2003

	T-shirts	Trousers	Shirts	Pullovers	Total
Volume of fabrics (Sq. Metres millions)	125.7	39.6	23.0	21.6	209.9
% of total textiles	60%	19%	11%	10%	100%

The biggest consumers of fabric are shown in the table below. Due to the fact that figures of consumption per company are not available, the table below provides an indication of the size of the companies in terms of employment.

Table 12 Companies by category of manufactured product

Products And Company	Employment
Trousers	
Sinotex	2216
Grove Industries	1764
Denim de l'ile	1100
Firemount Textiles	798
Pullovers	
Floreal Knitwear	4557
Shibani Knitting	1798
Sentosa	929
Southern Textiles Ltd	650
Shirts	
Textile Industries Ltd	3000
Aquarelle Clothing Ltd	1682
New Island Clothing	650
Noblesse	616
Bentley	500
T Shirts	
CMT	4612
Tropic Knits	2659
World Knits	1360
Star Knitwear	1259

3.3.2 Issues/Constraints related to the sourcing of fabric

Most of the apparel companies making knitted products are vertically integrated, which implies that they manufacture their own fabrics. The only companies concerned with the sourcing of fabrics are those making woven products. The domestic supply of locally manufactured fabric is limited by the existence of only few weaving companies. Due to the small size of the market, weaving companies produce only a limited variety of basic fabrics. Therefore, local companies sometimes have to rely on imported fabrics to be able to sustain the manufacture of garments, especially for higher value added products intended for niche markets.

The only imports of fabrics from the region are from Madagascar. These products have the advantage of benefiting from rules of origin for exports to both Europe and the USA. Imports from Madagascar have been quite important during the last 10 years due to free trade between the two countries and also as a result of the delocalisation and rationalisation of tasks between sister companies. In fact, trade between Madagascar and Mauritius has been boosted during the last few years due to imports and exports of raw material and semi-finished goods between sister companies.

Interviews with the operators indicated that the perception of sourcing from the ESA region (unless they are known sources like South Africa and Madagascar) is negative. The major concerns raised as discussed above were related to logistics, freight constraints and unstable socio economic conditions. The recent social and political unrest in Madagascar is an unprecedented example. Many companies have been severely affected due to the fact that orders were delayed for months. This situation has been responsible for many bankruptcies. The inefficiency of the port services (high costs of handling etc, due to unsophisticated equipment), increasing freight costs and port handling charges have been indicated as constraints to the sector.

According to operators, as with sourcing yarn, fabric sourced from outside the region is generally more expensive and also bears the increased probability of being delayed. Under AGOA, these products do comply with rules of origin requirements.

4.0 TRADE PERFORMANCE

4.1 Trade policy and regulatory environment

Following difficult economic situations during the late 70's and early 80's the government has been implementing recommendations made by World Bank and IMF structural adjustment programmes. These concerned mainly economic liberalisation issues. Trade liberalisation was among the most important policies that started to be implemented by the government and thereafter further decisions in favour of the development of the three main industries (Sugar, EPZ and Tourism) were experienced in this sector. In the textile sector, decisions were taken to set up various incentive schemes to encourage investment in this area. The Export Processing Zone incentives were also reviewed and included tax holidays for companies, duty free import of raw material and machinery.

Regarding trade policies, since the mid 80's, Mauritius has gradually adopted trade liberalisation measures with the abolition of trade licences. This has led to a number of other trade liberalisation measures, which have been implemented since then. Following the same trend, a major tariff reduction programme was implemented in 1994 where the tariff structure, which consisted of 60 different tariff rates, was reduced to 8 rates. The maximum MFN customs tariff was reduced from 600% to 80%. In fact, 4 400 products were subject to a significant tariff reduction in 1994. Other tariffs and taxes of equivalent effect were combined into a single customs tariff.

An 8-band customs tariff structure was therefore established with 8 different rates ranging from 0% to 80% (0-5-15-20-30-40-55-80). Major decisions regarding tariff reductions are often made during budget speech exercises. However, the responsible Minister can also make modifications whenever necessary. Based on the different modifications in the tariff rates, Mauritius now has a 9-band tariff structure with a 10% rate, which has been added to the existing 8-band.

In the last 6 years, despite the fact that Mauritius is still considered to be a high tariff country compared to other COMESA member states, there has been significant reduction in the tariff rates.

The table below gives an indication of the changes in the tariff rates since 1998. Comparing 1998 and 2004 tariff, there has been a significant reduction of the 80%, 55% 20%, 15% rates and more than a 300% increase in the 0% rate. This shows the government's policy to bring down rates. Nevertheless, the 80%, 55%, 40% still represent 23% of the products with high tariffs. The existence of high rates in the tariff structure clearly shows that some local industries are being protected through customs tariffs. Furthermore customs revenues still represent an important source of revenue for the government. It accounts for approximately 17% of the government revenue.

Table 13. Number of Products under Current Customs Tariff Structure

	Number of products concerned	
Tariff	**1998**	**2004***
80%	803	676
55%	455	185
40%	493	470
30%	375	233
20%	942	111
15%	1,088	464
10%	-	159
5%	347	54
0%	937	3528

*Post budget 2004

On the other hand, most of the raw materials and capital goods for local industry are either exempted from or subject to 0% customs duty. A number of consumables such as food items and basic necessity items are also zero-rated. The main categories of products in this range are live animals, preserved foods, fruits and vegetables and raw materials and other inputs for the textile industry. Medicaments, chemical products, machinery, paper and inputs for iron and steel products are the main products bearing a tax of 5%.

Looking at imports from the region i.e. with COMESA and SADC, customs tariffs do not affect the textile and garments industry due to the fact that all raw material and production equipment for this sector is exempt from duty under the EPZ act.

Table 14: Tariffs and non-tariff charges for Cotton and Textiles in Mauritius

HS & Commodity Description	**Tariff on imports from**			**Non tariff charges (specify)**
	COMESA (in the case of Mauritius)	**SADC**	**Tariff on imports from other countries**	**VAT**
HS5201: Cotton not carded or combed (cotton lint)	0	0	0	15%
HS5203: Cotton, carded or combed	0	0	0	15%
HS5204: Cotton sewing thread, whether or not put up for retail sale (not captured)	0	0	0	15%
HS5204: Cotton	0	0	0	15%

sewing thread, whether or not put up for retail sale (not captured)				
HS5205: Cotton yarn (other than sewing thread) containing 85% or more by weight of cotton not put up for retail sale.	0	0	0	15%
HS5206: Cotton yarn (other than sewing thread), containing less than 85% by weight of cotton, not put up for retail sale. (Not captured)	0	0	0	15%
HS5207: Cotton yarn (other than sewing thread) put up for retail sale. (Not captured)	0	0	0	15%
HS5208, 5209, 5211, 5212: Woven fabrics of cotton, containing 85% or more by weight of cotton, weighing not more than 200g/m2 (not captured)	0	0	0	15%

The tariff regime for cotton and textile in Mauritius as indicated in the table above is zero. The main reason being that these items are used as inputs in the spinning and apparel industry especially in the EPZ sector. In order to encourage the garments industry, companies manufacturing for the local market also benefit from this regime. These products however are subject to a 15% VAT on the CIF value of which the EPZ sector is exempted. Similar products from COMESA or SADC countries are also zero-rated.

Table 15: Tariffs and non-tariff charges for Garments in Mauritius

HS & Commodity Description	**Tariff on imports from**			**Non tariff charges (specify)**
	COMESA (in the case of Mauritius)	**SADC**	**Tariff on imports from**	**VAT**

					other countries	
			Other SADC	RSA		
60032000	- Of cotton	0	0	0	0	15
61012000	Men's or boys' coats, capes, cloaks etc of cotton, knitted/crocheted	0	0	0	80	15
61022000	Woman's or girls' coats, cape, cloak etc of cotton knitted/crocheted.	0	0	0	80	15
61032200	Men's or boys' ensembles of cotton, knitted or crocheted	0	0	0	80	15
61041200	Women's or girls' suits of cotton, knitted or crocheted	0	16	48	80	15
61051000	Men's or boys' shirts of cotton, knitted or crocheted	0	16	48	80	15
61061000	Women's or girls' blousers, shirts etc of cotton, knitted/crocheted	0	16	48	80	15
61071100	Men's or boys' underpants and briefs of cotton, knitted or crocheted	0	0	0	80	15
61082100	Women's or girls' briefs and panties of cotton, knitted or crocheted	0	16	48	80	15
61091000	T-shirts, singlets and other vests, of cotton, knitted or crocheted	0	16	48	80	15
61102000	Jerseys, pullovers, cardigan,waist-coat etc of cotton,knitted/crocheted	0	0	0	80	15
61112000	Babies' garments & clothing accessory of cotton,knitted/crocheted	0	16	48	80	15
61121100	Track-suits of cotton, knitted or crocheted	0	16	48	80	15
61142000	Garments of cotton, knitted or crocheted, nes	0	0	0	80	15
61159210	---Varicose vein stockings	0	0	0	0	15
61169200	Gloves, mittens and mitts, of cotton, knitted or crocheted	0	0	0	40	15
62011200	Men's or boys' overcoat,raincoat,cloak etc of	0	0	0	80	15

	cotton,not knitted/crochete					
620192 00	Men/boy's anorak,wind-cheater,wind-jacket of cotton,not knitted/crocheted	0	0	0	80	15
620212 00	Woman's/girl's overcoat,raincoat etc of cotton,not knitted/crocheted	0	0	0	80	15
620322 00	Men's or boys' ensembles of cotton,not knitted/crocheted	0	0	0	80	15
620332 00	Men's or boys' jackets and blazers of cotton,not knitted or crocheted	0	16	48	80	15
620342 00	Men's/boys' trouser,bib,short etc of cotton,not knitted/crocheted	0	16	48	80	15
620412 00	Women's/girls' suit of cotton, not knitted or crocheted	0	0	0	80	15
620422 00	Women's or girls' ensembles of cotton, not knitted or crocheted	0	0	0	80	15
620432 00	Women's or girls' jackets of cotton, not knitted or crocheted	0	0	0	80	15
620442 00	Women's or girls' dresses of cotton, not knitted or crocheted	0	16	48	80	15
620452 00	Women's or girls' skirt & divided skirt of cotton, not knitted/crocheted	0	16	48	80	15
620462 00	Women's/girls' trouser,bib,short etc,of cotton,not knitted or crocheted	0	16	48	80	15
620520 00	Men's or boys' shirts of cotton, not knitted or crocheted	0	16	48	80	15
620630 00	Women's/girls' blouses,shirts,shirt blouses, of cotton,not knitted/croche	0	16	48	80	15
620721 00	Men's/boys' nightshirt & pyjamas of cotton,not knitted or crocheted	0	0	0	80	15
620821 00	Women's/girls' nightdress & pyjama of cotton, not knitted or crocheted	0	16	48	80	15
620891 00	Women's/girls' singlet,brief,pant,neglige,etc of cotton,not knitt/crochet	0	0	0	80	15
620920 00	Babies' garment & clothing accessories of cotton,not knitted or crocheted	0	16	48	80	15
621132 10	Dhoties of cotton not knitted and crocheted	0	0	0	0	15
621141	Women's or girls'	0	0	0	80	15

00	tracksuit,garment of wool,nes,not knitted or crocheted					
630221 00	Printed bed-linen of cotton (excl. knitted or crocheted)	0	0	0	80	15
630231 00	Bed linen of cotton, not printed, knitted or crocheted	0	0	0	80	15
630232 00	Bed linen of man-made fibre not printed, knitted or crocheted	0	0	0	80	15
630251 00	Table linen of cotton not knitted or crocheted	0	0	0	80	15
630291 00	Toilet linen and kitchen linen of cotton, excl 630260	0	0	0	80	15
630311 00	Curtain & interior blind; bed valances of cotton, knitted or crocheted	0	0	0	80	15
630391 00	Curtain & interior blind of cotton etc; not knitted/crocheted	0	0	0	80	15
630520 00	Sacks and bags, used for the packing of goods, of cotton	0	0	0	15	15
630611 10	Tarpaulins of cotton	0	4	12	20	15
630621 00	Tents of cotton	0	0	0	40	15
630641 00	Pneumatic mattresses, of cotton	0	0	0	80	15
630691 00	Sail board/landcraft & camping goods of cotton	0	0	0	40	15

Regarding garments and finished products made out of fabrics, the duties vary from 15 to 80%. The above selected items, of which the dominant ones are garments; attract a duty of 80%. For COMESA countries, if imports justify the rules of origin criteria, the products are zero-rated. However the case is different for SADC countries where imports from RSA benefit from only 40% reduction whereas those from other SADC countries benefit from 80% reduction.

On the non-tariff barriers side, with the liberalisation of trade, no permit is required for imports of raw material (except health permits for wool) and equipment.

4.1.2 Trade Agreements

COTONOU

On the trade agreements side, Mauritius being a member of the ACP, exports from the EPZ benefited from duty free and quota free access (subject to the EU rules of origin) to the EU markets through the Lomé Convention. However with the new Cotonou agreements, the EPZ industry will have to face a different scenario. The outcome of the ongoing negotiations will probably be decisive for the future of this industry. The Cotonou Agreement will not only change the relationship between the ACP states and the EU, but also with the regional integration organisations. This agreement sets new parameters for regional integration that in a way may overturn traditional cooperation links.

The Cotonou agreement however has strict rules of origin and often apparel companies had difficulty in benefiting from it. This also explains one of the reasons why apparel companies have had to integrate vertically to qualify for these rules of origin. In a regional perspective, for example, South Africa is known to be an interesting source of yarn and fabrics. However, they cannot the meet rules of origin laid down by the Cotonou Agreement.

Regional Trade Agreements

Mauritius has always been in favour of developing free trade relationships with countries of the region hence its membership of most of the regional organisations (IOC, COMESA, SADC, IOR). The trade policy adopted by Mauritius for the development of intra-regional trade is also in line with the objectives of the free trade agenda of the various regional organisations to which it belongs. On the trade agreements side, Mauritius being a member of the ACP, exports from the EPZ benefited from duty free and quota free access (subject to the EU rules of origin) to the EU markets through the Lomé Convention.

At the IOC level, Mauritius has opened its trade to country members. On the COMESA, Mauritius is a member of the free trade area and is giving a 90% rebate on imports from other non-FTA COMESA members even if there is no reciprocity from the relevant member state. At the SADC level, Mauritius has signed the SADC Trade protocol and is implementing the tariff reduction programme.

In view of the proposed Common External Tariff under COMESA and the proposed FTA under SADC in 2008, special consideration should be given to the context of the Mauritian economy. The complexity of the Mauritian case is that firstly, local industries will face severe competition vis à vis imported products at least in the short term if customs duties are reduced and secondly, the rates for raw materials and capital goods (which are already zero rated) cannot increase in a CET due to the already high production costs in Mauritius. These measures will also have adverse effects on exports and severely affect the Export Processing Zone sector.

It will be extremely difficult, therefore, for Mauritius to move from its current tariff structure to that being proposed for the COMESA CET, with its currently proposed maximum rate of 30% and a three non-zero rate band. Furthermore, there are extensive discussions underway with COMESA to reduce this maximum rate to 25%. The adjustment measures that Mauritius would need to be able to conform to these rates would be excessive. On the other hand, Mauritius is committed to COMESA and is an active trading partner within the COMESA Free Trade Area. Some accommodation therefore has to be found and transitional measures be introduced.

The private sector does not consider the SADC or the COMESA market for exports as very attractive. Apart from exports to South Africa, textile and clothing exports have not been high. Imports from SADC, however, are quite high, especially textiles from South Africa.

Mauritius has also been promoting partnerships between countries in regional blocks (between AGOA–SADC–COMESA) especially in the context of exploring opportunities under AGOA and thus boosting regional synthesis. This synthesis will help in encouraging companies into vertical integration as well as horizontal integration of the sector. Examples are: investment in spinning plants in Mali, the setting up of basic manufacturing in Madagascar, Mozambique, etc. The idea of producing yarn and exporting to the region is part of this strategy to enable Mauritian EPZ firms to develop business opportunities under AGOA.

AGOA

The trade provisions of the Africa Growth and Opportunity Act (AGOA), enacted in November 2000, allows duty-free and quota-free access to US for apparel made in Mauritius, subject to conditions regarding fabrics sourcing. This benefit is extended to AGOA eligible countries within Sub Saharan Africa.

The AGOA also provides for an extension of the GSP Scheme, up to 2008 and covering an additional list of over 1800 products such as footwear, leather articles and glassware. These products are henceforth admitted duty-free if there is substantial transformation leading to at least 35% value addition. Main exports to the US comprise garments, jewellery items, cut/polished diamonds, spectacles, carnival masks, etc.

AGOA brings increased opportunities for Mauritius and the region enabling countries to diversify their export markets to USA. The Mauritian government has on the one hand, continuously been lobbying with SADC and COMESA for extending the period of AGOA as well as for more flexible conditions; and on the other hand, been giving support to the Textile and Clothing sector to take advantage of AGOA.

Over and above quota free and duty-free access to the US market, Mauritius can also reap benefits from the AGOA on the condition that it develops its cotton yarn spinning industry. One of the problems is that quite a number of Mauritian companies have not been well exposed to the US markets and will therefore take time to adapt to a relatively demanding market.

4.1.3. Institutional support

The EPZDA

Being aware of the possible problems and the future requirements of the EPZ sector the Mauritian government set up a parastatal institution in 1992 called the Export Processing Zones Development Authority (EPZDA). Mauritius was then in its second phase of industrialisation characterised by low production cost stemming from low wages, favourable international conditions and an abundance of semi-skilled labour. In order to make a successful transition to the second phase of development, a proactive approach to industrial policy and industrial restructuring was required. To be able to face international competition, improvement in skills, the production of higher value added products, improved delivery times and creativity in product design were vital requirements. Therefore the idea behind setting up the EPZDA was to be able to address those issues critical to the successful transition from a labour-abundant to a skills-intensive economy. Specialised skills were needed to enhance productivity through improvement in the level of technology and management techniques.

According to the EPZDA the institution has been closely monitoring the whole of the export processing zone sector (of which the textile and garment sector represents a large proportion) and have a number of programmes in line with their objectives.

In 2002 –2003 the EPZDA had redefined its strategy such as:

- To promote technology in the industry through technology watch and technology transfer
- To carry out business process re-engineering to maximize the efficiency of enterprises
- To carry out research and dissemination of information
- To provide training to the industry
- To promote clusters
- To provide support services in the field of regional cooperation

Objectives

- To promote the diversification of new product range
- To sustain the growth of the core textile products
- To move up market to attain higher value added for exports
- To promote and foster the promotion of textile clusters
- To promote technology transfer and act as a technology watch
- To provide support services in the field of regional cooperation
- To reinforce knowledge transfer through research and dissemination of information
- To impart skills development
- To promote ICT applications in the industry
- To enhance enterprise efficiency through Business Process Re-engineering

The CTC

Due to the specificity of the textile and garments sector and the increasing demands by operators, another arm of the EPZDA was set up. More geared towards the technological aspects of the industry, the Clothing and Textile Centre was created with the following strategy:

- To make "Made in Mauritius" an established label
- To prepare the Mauritian Textile and Clothing Industry to face up to new challenges
- To assist towards the development of an integrated fashion industry
- To maintain a regular in plant presence and be a source of constant support through the user scheme
- To carry out Productivity and Quality Improvement Programmes in the non-textile sectors, while taking on board green productivity
- To provide information in the most timely and cost-effective manner
- To strengthen existing and establish new international links to facilitate the acquisition of technology and technical know-how
- To develop ways and means to increase financial autonomy over time with due consideration to National Development Objectives

The objectives of the CTC are:

- To assist the textile & apparel industry to enhance its value-addition throughout the value chain

- To promote and enhance improvement in clothing manufacturing technology
- To assist industry in building up the design and creative content of products
- To assist in the development of human resource potential for the industry
- To be a source of information on all matters related to industry
- To carry out R & D
- To carry out commissioned studies

The Textile Emergency Support Team (TEST)

Despite support from the above institutions, many of the textile and garments manufacturing companies have been deteriorating. In order to examine the decline in this sector, the government had set up an high powered Committee in 2001. This consisted of representatives of the public and private sector operators. As a result a Policy Intervention Committee on Textile (PICT) was set up in 2003 followed by the Textile Emergency Support Team (TEST). The PICT is a policy oriented body and comprises relevant Ministers and representatives of the private sector. The role of the TEST (a joint private/public sector initiative to assisting enterprises) was to re-structure the textile and apparel sector leading to the enhancement of their international competitiveness. The TEST functions on the principle of mutual commitment and a shared vision for the betterment of the textile and clothing sector. This committee is under the joint chairmanship of the Ministry of Finance and the Joint Economic Council (JEC).

The functions of the TEST are as follows:
(a) Act as a driving force for the restructuring of textile and clothing companies,
(b) Undertake a corporate diagnosis of individual companies to identify their strengths and weaknesses in various areas,
(c) Assist companies in developing business restructuring plans aimed at increasing efficiency and international competitiveness,
(d) Interact with relevant support institutions/ministries to address specific problems of companies,
(e) Report to the Policy Intervention Committee on issues requiring policy decisions.

The TEST reports to the Policy Intervention Committee on Textile (PICT). The role of the PICT is then to examine and intervene on policy issues based on results from TEST's analysis. One of the first actions of the TEST programme was a diagnosis of enterprises through productivity measurements. The TEST then generated productivity indicators, from which a confidential and personal report was sent to the various enterprises.

Three main areas of action were identified. These were found to be generic problems experienced in the sector consisting of:

- Productivity improvement to improve general level of productivity,
- Financial management, and
- International marketing.

In terms of productivity, two productivity improvement programmes, the Kurt Salmon Associates productivity improvement program and the Gemba Kaizen programme have been set up.

As regards financial management, a Corporate Debt Restructuring Committee (CDRC) has been set up by the Bank of Mauritius to assist TEST companies in financial restructuring.

The CDRC have co-opted a consultant to assist in its task and the process will involve the active participation of debtors (enterprises) and creditors (Banks and Leasing companies).

Marketing

On the marketing front, the body presently responsible for the promotion of exports is the (MIDA) Mauritius Industrial Development Authority. MIDA (formerly MEDIA) used to be the investment promotion and also the marketing body for mainly EPZ products. With the separation of the respective roles, MIDA focused more on the marketing of Mauritian exports. This agency carries out market surveys and also marketing missions to the main markets as well as in the region. Presently it has initiated a programme through the services of a consultant who will help to improve the marketing skills of companies so that they are in a better position to identify promising export markets, identify promotion channels, and develop appropriate marketing strategies for improved competitive advantage.

4.1.4 Financial Policies and Budgetary Measures

Budgetary Measures

Since the 90's with the objective of positioning Mauritius in its second development phase in the textile and apparel sector, a number of decisions have been taken during yearly budgetary exercises. Some of the regular measures concerned the annual increase of funds to the EPZDA for the extension of its services in terms of consultancy for the upgrade and modernisation of the companies in that sector. Additional funds were also allocated for the investment and export promotions of the relevant parastatal organisations like the former Mauritius Export Development and Investment Authority (MEDIA).

Other measures concerned the opening up of access to additional financing through equity. Through the Development Bank of Mauritius, a Textile Modernisation Loan Scheme had been set up and this fund was raised four fold last year in 2003 with a ceiling of almost US$ 700 000 and the interest rate has been lowered from 10% to 8%. A new scheme has also been provided to finance the working capital requirements of textile companies.
In order to promote vertical integration of the textile sector the Mauritian government has also introduced a special package of incentives for the promotion of investment in the spinning mills. The scheme includes a special tax credit of up to 60 per cent of the equity invested, spread over a maximum period of six years. Land is also being provided for lease at highly concessionary rates.

An additional financial measure consists of a working capital fund, which has been set up for firms with fixed orders having cash flow problems. The Development Bank of Mauritius can finance up to 80% of the value of the order with a ceiling of Rs 5 million (approx. US$ 170 000) and an interest rate of 10% per annum.

On the human resource side, the government is aware that there is a need for labour with multiple skills for greater production flexibility and increased productivity. With the expected closure of various production units the government anticipated the need to re-skill the retrenched workers to facilitate their mobility and redeployment both within and outside the textile sector. This role has to be carried out under programmes created by the Industrial and Vocational Training Board (IVTB) in collaboration with the Export Processing Zone Development Authority (EPZDA). In that context, provision has been made for the launch of special re-skilling schemes for workers aged over 40 who cannot be re-absorbed in the sector. Their access to micro-credit has also been facilitated.

Exchange Rate Policy

In July 1994, the rupee was floated. The Bank of Mauritius no longer sets the buying and selling price of foreign currency. The role of the central bank has changed from market maker to market player. Intervention in the currency market is limited to dollar transactions with the objective of stabilising the rupee.

The Exchange rate situation for the last few years has not helped the export competitiveness of the Mauritian EPZ especially when the US$ (mainly used for payments of imports) was stronger than the Euro (representing mainly revenue from EPZ exports). The situation however seems to be more favourable to Mauritian exporters.

Investment Policies and incentive schemes

Since the mid eighties the Mauritian government has been trying to improve the investment conditions in Mauritius. Some of the factors that have contributed to the economic development of Mauritius during the last decades have been the existence of a conducive regulatory framework and tax incentives. The latter have been instrumental in attracting foreign as well as local investment in the country. Various initiatives have been taken and new incentives have been put forward over the years. One of the main problems however remained administrative delays. Starting any new production unit requires a number of operating permits and licences such as the EPZ certificate, Trade Licence, the Factory Licence, the Environmental Impact Assessment, etc. However the government is making efforts to streamline procedures with a view to facilitate investment.

Following the 2003/2004 Budget, reforms have been proposed in the delivery of permits and licences for investment. The objective of these reforms was made to reduce delays, provide for greater predictability, fast track procedures and eliminate overlapping. Policy guidelines for private investment in strategic areas were elaborated. In fact in the restructuring process, a new institution for the promotion of investment known as the Board of Investment was set up in 2000. The idea is to provide a boost to investment through a more aggressive approach to market Mauritius as an investment hub especially in new areas like Information and Communication Technology.

The investment environment in Mauritius benefits from various incentive schemes, which are aimed at encouraging development in specific sectors. The first investment incentive schemes were set up as far back as 1970's for stimulating export oriented industries. Other schemes added thereafter concerned the Export Service Zone in 1981 and the Industrial Building scheme in 1986. Under these schemes companies benefited from a lower corporate tax and a tax holiday for 10 and 20 years. In 1993 with a view to modernise the existing schemes, amendments were made to the legislation leading to the "Industrial Expansion Act 1993". Under that legislation, the main advantage (for existing schemes) was no corporate tax for export-oriented enterprises whereas a 15% corporate tax scheme was given for the local enterprises with the possibility of export in specific sectors. These concerned the Pioneer Status Enterprise, the Strategic local enterprise and the Small and Medium Enterprise. There are other schemes outside the industrial sector, which also benefits from relatively similar advantages such as: Health Development Certificate Scheme and Hotel Management Incentive Scheme.

Examples of existing investment schemes and their objectives are:

Schemes	**Objectives and Qualifying Activities**	**Incentives**
Export processing zone scheme (EPZ)	to encourage the establishment of export oriented manufacturing enterprises	No customs duty or VAT on raw materials and equipment Corporate tax of 15% No tax on dividends and capital gains 60% remission of customs duties on buses of 15-25 seats 50% exemption on the normal registration fee for the purchase of land and buildings 50% relief on personal income tax for 2 expatriate staff
Export service zone scheme (ESC)	to promote the establishment of export oriented service enterprises	15% Corporate tax, exemption from payment of income tax on dividends No customs duty on office equipment
Industrial Buildings Enterprise Scheme	to invest in industrial buildings to be used by a manufacturing enterprise Construction, for rental purposes, of industrial buildings or levels thereof, provided floor space is at least 1,000 square meters	15% corporate tax No tax on dividends 50% exemption on the normal registration dues for land purchase
Pioneer status scheme	to boost the development of the electronics assembly industries, micro electronic including watch making products, light engineering and informatics together with high precision machinery of metal	No customs duty on raw materials and equipment as per schedule list Corporate tax of 15% No tax on dividends Free repatriation of profits, dividends and capital

Schemes	Objectives and Qualifying Activities	Incentives
	and plastic part, electroplating, plastic rubber injection, moulding and their related services and maintenance industries	
Small and medium enterprises (SMIDO)	to provide for the promotion and development of small scale industries which engage in manufacturing and which use production equipment, the aggregate value of which does not exceed approximately US$ 170 000	No customs duty on production equipment and raw materials as per schedule list Corporate tax of 15%
Modernisation and Expansion scheme	to provide a new legal framework for industrial modernisation, transfer of technology, upgrading of small and medium enterprises, integration of non-Export Processing Zone Sub sectors into Export Processing Zone Sectors and for the protection of the environment Investment in productive machinery and equipment, such as automation equipment and processes and computer applications to industrial design, manufacture and	No customs duty on production equipment Income Tax credit of 10% (spread over 3 years) of investment in new plant and machinery, provided at least Rs. 10 million are spent within two years of date of issue of certificate. This is in addition to existing capital allowances, which amount to 125% of capital expenditures An additional allowance of 30% over the normal initial allowance of 50% on investment made on anti-pollution machinery or plant

Schemes	Objectives and Qualifying Activities	Incentives
	maintenance (CAD/CAM) Investment in anti-pollution and environment protection technology to be made within 2 years of date of issue of certificate	
Spinning Incentives schemes	An attractive tailor-made package of incentives is in fact offered to spinning units in Mauritius	A ten-year tax holiday for spinning companies starting operation before 30 June 2006 Any unrelieved loss (after deduction of profits) incurred by a spinning company during the period of exemption shall be available for carry forward under section 59 of the Income Tax Act Investors subscribing at least 20% to the share capital of a spinning company, or over Rs. 60 million (whichever is the higher), will be granted a special investment tax credit. They may opt to deduct from their tax payable, 15% of the amount so invested per annum over 4 years or 10% over 6 years. The tax credit will be made available to the investing company right from the year the investment is made and not in the subsequent year as is usually the case Any unrelieved special tax credit may be carried forward for a period of five consecutive income years following the year the investment is made. The deduction allowed in respect of the special tax credit shall be withdrawn if the spinning company has not started operations by 30 June 2006 Land at very concessionary rates 5% registration duty on purchase of land and buildings for industrial purposes Possibility of equity participation up to a maximum of Rs 100 mn in the share capital of spinning units by the National Equity Fund

Schemes	Objectives and Qualifying Activities	Incentives
		Duplicate remission on construction materials No customs duty and VAT on raw materials and equipment No tax on dividends No capital gains tax Free repatriation of profits, dividends and capital 60% remission of customs duties on the purchase of buses of 15-25 seats used for the transportation of workers 50% relief on personal income tax for two expatriate staff Concessionary Electricity rates Duty remission on the import of two cars (maximum duty remission of Rs 500,000 per car) provided the initial investment exceeds Rs 50 million or the project creates at least 200 jobs for Mauritian workers
Strategic local Enterprise Scheme	Companies manufacturing for the domestic market and engaged in such activity likely to promote and enhance the economic, industrial and technological development of Mauritius.	15% corporate tax No tax on dividends

Under the Export oriented enterprises the following operations are encouraged:

- Printing and publishing as well as associated operations
- Information Technology activities
- Agro industries
- Export-oriented Enterprises
- Produce of deep-sea fishing (including fresh or frozen fish)

The success of the development of the textiles and garments export oriented sector is to a large extent due to the establishment of the EPZ and the ESZ schemes. In fact these schemes have had a tremendous impact on FDI in the Export Processing Zone sector. In addition to the stable political and social conditions, these incentives have provided the appropriate legal framework and helped in attracting the foreign investors in the textile and garments manufacturing sector in Mauritius.

Few years ago, the government introduced a night tariff for electricity for EPZ companies, which was aimed at reducing the costs of heavy users, such as weaving and knitting units. However, this tariff plan, instead of helping companies, turned out to be more costly.

Recent policy developments

In 2004, with the objective of synergising efforts of the existing institutions who are directly related to the export oriented manufacturing industry, it has been proposed to set up a new body called the Enterprise Mauritius which will integrate existing organisations such as EPZDA, MIDA (Mauritius Industrial Development Authority formerly MEDIA) and SUBEX-M. The new organisation will be a private company limited by shares and its primary customers will be existing and new entities as well as entrepreneurs in the industrial sector, i.e. those involved in the processing and transformation of goods.
The objectives of this new organisation will be:

- To act as technology watch and a focal point for technology diffusion;
- To provide market information, develop competitive intelligence and cater for export promotion;
- To identify, track and coordinate skills needs and trends;
- To provide start-up and infrastructure facilities to entrepreneurs;
- To facilitate strategic partnership and networking;
- To provide advisory services on enterprise development
- To provide consultancy services,
- To carry out such other activities as are incidental or conducive to the attainment of the above objectives.

Despite the existing problems, operators in the textile and apparel sector feel that the 2004/2005 Budget was short of expectations given the current problems faced by the industry. According to them there are no innovative fiscal measures/incentives to encourage manufacturing companies to invest in new technology. Another complaint in the sector is that the National Equity Fund is still not playing its role as the proposed Rs 1bn (US$ 35 m) has still not been disbursed since its setting up in 2003.

4.2. Performance of exports and imports

The table below consists of export and import figures of Cotton lint, Cotton Yarn and Fabrics from and to Mauritius from 2000 to 2003. For the sake of harmonisation all volume figures are in kilograms as provided by the central statistical office. All values have been converted to US$ using the average period exchange rate provide by the Bank of Mauritius.

Table 16 Export Figures for the textile sector 2000-2003

	2000		**2001**		**2002**		**2003**	
	Volume (Kg)	**Value (Fob US$)**	**Volume (Kg)**	**Value (Fob US$)**	**Volume (Kg)**	**Value (Fob US$)**	**Volume (Kg)**	**Value (Fob US$)**
Total Cotton Lint	69,096	486,702	175,704	1,099,615	7,468	49,944	-	-
To ESA Countries	69,096	486,702	175,704	1,099,615	7,468	49,944	-	-
As a % of Total	100%	100%	100%	100%	100%	100%	-	-
To the ROW	-	-	-	-	-	-	-	-
Total Cotton Yarn	297,734	1,794,509	749,695	3,924,450	408,750	2,403,827	265,012	1,371,988
To ESA Countries	199,166	1,354,055	546,975	3,035,226	159,218	1,045,170	176,212	1,137,220
As a % of Total	67%	75%	73%	77%	39%	43%	66%	83%
To the ROW	98,568	440,454	202,720	889,224	249,532	1,358,657	88,800	234,768
Total Cotton Fabrics	10,004,926	34,959,376	10,699,629	40,197,981	8,348,473	29,316,024	7,099,702	26,845,971
To ESA Countries	6,624,637	22,574,568	6,707,961	25,703,326	3,986,823	16,263,482	3,458,286	12,419,239
As a % of Total	66%	65%	63%	64%	48%	55%	49%	46%
To the ROW	3,380,289	12,384,808	3,991,668	14,494,655	4,361,650	13,052,542	3,641,416	14,426,732

Source: Central Statistical Office

The export figures indicate that the volume of export of cotton lint and yarn is quite low compared to that of cotton fabrics. In fact export figures show that all of the cotton lint is exported mainly to ESA countries and in particular Madagascar, which also includes exchanges among sister textile companies. Given the absence of this raw material in Mauritius, these figures do not represent a major activity. The total market value for 2002 was roughly US$50,000 and there was no export in 2003.

In the case of Cotton yarn the volume exported is not very significant. The total market value represented US$1.4 million in 2003. Regional exports represent however a significant percentage of the total exports. As in the case of cotton lint, most of the regional exports are mainly for Madagascar, which includes trade between sister weaving companies. Over the 2000-2003 period the volume has not been constant, reaching a peak in 2001 but matches the 2000 level in 2004.

The export of cotton fabrics represents a greater volume of transaction but with slightly declining figures from 2000 to 2003. In value terms the export figure shows a decrease from US$35 million to US$ 27 million in 2003 with a peak in 2001. As figures show in the table above, the share of export to the region is also important averaging almost 60% of the total exports. Among the different kinds of fabrics the dominant exports consist of denim (almost 80% of the volume representing US$ 14.5million), which is exported to Madagascar, Zimbabwe, South Africa and Kenya. Exports of denim to the rest of the world are to Italy, Malta and Turkey. Regarding the other type of fabrics, regional destinations for exports have been mainly Madagascar, with however important volumes to Zimbabwe, South Africa and Kenya. Export of fabrics to the rest of the world included main countries such as Malta, Sri Lanka, India and China. In terms of market share exports to the region have been decreasing compared to the rest of the world.

Table 17 Export of garments from 1999 to 2002, Volume in ('000 pieces) and Value in US$

Apparel products	**1999**		**2000**		**2001**		**2002**	
T-Shirt	77,257	77,257	94,622	94,622	93,615	93,615	91,798	91,798
% change			22%	22%	-1%	-1%	-2%	-2%
Pullovers	15,011	15,011	17,038	17,038	18,092	18,092	16,783	16,783
% change			14%	14%	6%	6%	-7%	-7%
Men's shirts	23,176	23,176	24,977	24,977	21,842	21,842	18,233	18,233
% change			8%	8%	-13%	-13%	-17%	-17%
Trousers	31,854	31,854	34,221	34,221	36,478	36,478	40,511	40,511
% change			7%	7%	7%	7%	11%	11%
Total	**147,298**	**147,298**	**170,858**	**170,858**	**170,027**	**170,027**	**167,325**	**167,325**
% change			16%	16%	-0.5%	-0.5%	-2%	-2%

Source: Central Statistical office and MEPZA

The above table gives an indication of the export figures of the main products from the garments sector. The general trend observed from the above table indicates that from 1999 onwards the total value of exports from the apparel sector has been increasing in Rupee terms but almost decreasing in US dollar terms. The decline of the US$ at the international level accounts for some of this trend. For the same years the growth rate also has been on the downward side. In fact growth rate in the EPZ sector as a whole has been decreasing with negative growth rates in 2002 and 2003. On the whole the value of the export levels in most of the above sub-sectors of the Apparel industry have been more or less stagnant. In volume terms, the total number of garments has slightly increased from 1999 to 2000 followed by a slight drop in 2001 and 2002. T-Shirts represent more than 55% of the total garments exported with almost 92 million pieces followed by trousers (25% of the total) representing more than 40 million pieces. Pullovers, which account for 10% of the export market, have experienced a slight growth between 1999 and 2001 followed by a drop in 2002.

Table 18 Main Export Destinations (US$)

Countries	2001	2002	2003
EU Countries	700	705	744
UK	235	258	285
France	259	258	262
Italy	53	48	43
Germany	48	38	43
USA	289	320	315

Source Central Statistical Office

The main export destinations for the apparel products are shown in Table16 above. As indicated, Europe is the main export market with 67% of the total export value. The US represents 28% of the total export market. In fact this ratio has not varied much during the last five years. According to the MEPZA (Mauritius Export Processing Zone Association) there are few emerging markets, which are Madagascar, South Africa, Canada and Australia. Their share is however quite low compared to the main destinations. In 2001 they represented 7% of the total garments exports (due to larger export values to Madagascar) but in 2003 the share was reduced to 4% of the total apparel export markets.

Table 19 Emerging and potential markets (US$)

Countries	2001	2002	2003
Madagascar	59	14	20
South Africa	8	14	20
Canada	7	7	6
Australia	3	3	3

Source Central Statistical Office

5.0 RECOMMENDATIONS

The phasing out of the Multifibre agreement in December 2004 will surely lead to competitors such as China, India and Pakistan taking over a large share of our markets. Increasing labour costs relative to our Asian competitors as well as increases in other costs have contributed to eroding cost-competitiveness. Higher labour productivity, greater use of new technology and more up-market production are still to be achieved to increase our competitiveness relative to Asian countries.

In this new environment, emphasis should be placed on product differentiation, as Mauritius can no longer compete in terms of price. To achieve product differentiation, firms need to invest in new technology, adopt a comprehensive modernisation programme, intensify marketing efforts and engage in proper market research. The industry also needs to be fully integrated and efficient logistics management needs to be promoted. Finally, Mauritius needs to drive towards clustering which could provide a solution towards more value-added, quality products and reduced lead-time.

The future will lay in embracing innovative practices, focussing on value creation, the promotion of regional trade and the formation of strategic alliances. The emphasis should be placed on product differentiation, as Mauritius can no longer compete in terms of price.

Annex 1: Directory of spinning firms

	COMPANY	CONTACT PERSON	ADDRESS	TEL	FAX	E-MAIL
1	Arvind Spinning (Mtius) Ltd	Mr Feisal Kathrada	La Tour Koenig	2345000	2345005	aoml@arvind.mu
2	Tianli Spinning (Mauritius) Co. Ltd	Mr Zhang Yu	Belle Rive, Dubreuil	6972052	6972041	
3	Ferney Spinning Mills	Mr Eddy Yeung	PO Box 8, forest Side	6019000	6756100	ferney@intnet mu
4	Independent Spinning Mills	Mr Reshad Moosun	Camp Benoit, Petite Riviere	2334470	2336593	ismmkt@intnet.mu

Annex 2: Directory of weaving and knitting firms

Name	Address	Telephone	Fax	email	Product
Weaving					
Denim De L'ile	Royal Road Riviere Du Rempart	4125190	4125621		Denim Fabrics
The Arvind Overseas(Mtius) Ltd	La Tour Koenig, Pointe Aux Sables	2345000	2345005	aoml@arvind.mu	Man. of Yarn, Denim Fabrics
Socota Textile Mills Ltd	P.O Box 32, Curepipe	4266003	4266008		Woven Fabrics
Consolidated Fabrics Ltd	Royal Road, Solitude	2615828	2615845	thorel@consolidated-fabrics.com	Woven Fabrics
Knitting					
Texfields Knitting	Florida Lane, Terre Rouge	2489252	2489252		Knitted Fabrics
Richfield Textiles Ltd	K. Ramji Ind. Estate, Le Hochet, Terre Rouge	2489676	2489680	richtext@intnet mu	Knitting and Dyeing of Garments

Annex 3: Directory of apparel firms

NAME	ADDRESS1	ADDRESS2	TELEPHONE	FAX_NO	PRODUCT
A & W ZIP LTD	INDUSTRIAL ZONE	LA TOUR KOENIG	2711640	2347638	MANUFACTURE OF ZIPPERS
A.N.M GARMENTS LTD	HANOOMAN ROAD	RICHE TERRE, CENTRAL FLACQ	4139578	4139579	READY MADE GARMENTS
ABACA LTD	C\O COTTON CLUB	INDUSTRIAL ZONE, SOLITUDE	2616966		MANUFACTURE OF TROUSERS,SHIRTS,SHORTS,BERMUDAS, WAISTCOATS AND SUITS
ACL GARMENTS LTD	MEDIA INDUSTRIAL ESTATE	SURINAM	6255679	6256145	CHILDREN'S WEAR,BEACHWEAR,SWIMWEAR,SHORTS, SHIRTS,TROUSERS,POLO SHIRTS.
ADVENTURER CLOTHING	BOULET ROUGE	CENTRAL FLACQ	4139527	4138074	GARMENTS
AME MATEX CO LTD	TAGORE LANE	L'ESCALIER	6367618/6367308	6367308	POLO SHIRTS,DRESSES,T-SHIRTS
AMSUA TEXTILE LTD	442 ROYAL ROAD	MESNIL	6969434/2434-2492040	6969041	MANUFACTURE OF EMBROIDERED CLOTH,SHIRTS,SHORTS,TROUSERS, T-SHIRTS, POLO SHIRTS
ANNA ENT LTD	ANNA ST. BATIE	GRAND GAUBE	2839022		SHIRTS,SHORTS,TROUSERS
AQUARELLE CLOTHING LTD	BOUNDARY ROAD	QUATRE BORNES	4660833/0181	4647924	MAF. OF SHIRTS
AVANT (MTIUS]LTD	LA SOURCE	QUATRE BORNES	4255645/6/7-4255643	4255636	POLO SHIRTS,KNITTED GARMENTS,SHORTS,BLOUSES,SHIRTS, TROUSERS,JACKETS
AVENIDA CO. LTD	GUSTAVE COLLIN ST.	FOREST SIDE	6700009	6700009	MAN. OF HIGH CLASS LADIES WEAR
B.H. INDUSTRIES(MTIUS) LTD	20-22 SIR CELICOURT ANTELME AV	QUATRE-BORNES	4543170-4544986		BABYWEAR,JEANS,SHIRTS,BLOUSES, TROUSERS,SALOPETTES,SKIRTS,DRESSES, JUPE-CULOTTES,NIGHTWEAR,SHORTS, CALECONS,T-SHIRTS
BASIC TEXTILES LTD	ROYAL ROAD	TOMBEAU BAY	2472097,2472264,2472641	2472965	T-SHIRTS
BEACHWEAR EXPORTS CO LTD	32 MON DESIR	CARREAU LALIANNE, VACOAS	4261234/4253559		MANUFACTURE OF BEACHWEAR,UNDERWEAR,DRESSES & SKIRTS
BEAUTY FASHION LTD	CHEMIN GUIBIES PAILLES	OR P.O BOX 903 PORT LOUIS	2087733-2081729-2124970		SHIRTS,DRESSES,TROUSERS,POLO SHIRTS,T SHIRTS,BERMUDAS,NIGHTWEAR, PYJAMAS,DRAPS HOSE
BESTWILL GARMENTS	87,MORC FILATURE DE R.TERRE	TOMBEAU BAY	5470288	2473868	READY MADE GARMENTS
BETHEL GARMENTS LTD	VERGER ROAD	GOODLANDS	2839805		DRESSES,SHIRTS,BLOUSES,MIDIS,SHORTS,TR OUSERS
BIRKILL CLOTHING CO.PTY.LTD.	SEEGOBIN BLDG ROYAL ROAD	PLAINE MAGNIEN	6379168	6379169	WOVEN & KNITTED GARMENTS BATHERS,T-SHIRTS,POLO SHIRTS
C.B.K LTEE	200,ROYAL ROAD	BEAU BASSIN	4547968/4543283		SHIRTS,BLOUSES,TROUSERS,SHORTS,T-SHIRTS,TEXTILE
CADIZ GARMENT	ROYAL ROAD	CAMP DIABLE	6262376		SHIRTS
CAP-KALI LTD	CHARLES DICKENS STREET	GOODLANDS	2821752/53 EMTEL	2821755	MAN. OF CAPS,TROUSERS AND SHIRTS

			7740402		
CAPRA CO. LTD.	CR CHARLES REGNAUD & D'EPINAY	CUREPIPE ROAD	6983570	6983569	MAN. OF CAPS & T-SHIRTS
CARDINAL CO LTD	RUE DE VERGES	GLENPARK	4260676		POLO SHIRTS,T-SHIRTS,SHORTS,SHIRTS
CENTURY KNITTING LTD	29 DAVID STREET	P LOUIS	2422117/1965	2408640	WOLLEN SWEATERS
CHANCERY SHIRTS CO LTD	IND. ZONE	SOLITUDE	2615335	2605022	MEN'S & LADIES' HIGH FASHION SHIRTS,MEN'S UNDERWEAR
CHENTEX GARMENTS LTD	ROYAL ROAD	CIRCONSTANCE, ST PIERRE	4335099	4335105	KNITTED GARMENTS
CHINIAH GARMENTS	9 HOLLYWOOD RD	VACOAS	6962645(4241177)		SHIRTS,JACKETS,T-SHIRTS,POLO SHIRTS,DRESSES,SKIRTS,JOGGING SUITS
CIE MTIAN DE TEXTILES LTEE	66M BUILDING, VACOAS\PHOENIX	INDUSTRIAL ESTATE, PHOENIX.	4543054/9-6967931		COTTON T-SHIRTS,JOGGING SUITS,SKIRTS,SHORTS,JACKETS,SHIRTS, POLO SHIRTS,DRESSES,SWEAT SHIRTS,PANTS,MEN'S AND WOMEN'S SLIPS
CITIZEN EXPORT ENT LTD	33,ROYAL ROAD	BEAU BASSIN	4548894		SHIRTS,RAINCOATS,LADIES' DRESSES,SPORTSWEAR
CITY FASHION LTD	ROYAL ROAD	PHOENIX	6961333-6866807		SHIRTS,SHORTS,SKIRTS AND BLOUSES
CITY KNITWEAR CO LTD	29-31 DAVID STREET	PORT-LOUIS	2423840/1965/2117	2408640	WOLLEN PULLOVERS
CITY TEXTILES LTD	BLOCK 17-18	ZONE INDUSTRIAL ESTATE, COROMANDEL	2335028/29-6967946	2336400	KNITTED GARMENTS,SPINNING AND DYEING OF YARN
CLASSY CLOTHING LTD	GEOFFROY RD	BAMBOUS	4520608		TROUSERS,SLACKS,JACKETS,SHORTS, BERMUDAS,CASUAL BLOUSES,T-SHIRTS
CLAUDIA FASHION LTD	MEDIA IND.ESTATE	BEL AIR, RIVIERE SECHE	4192490	4192492	BRASSIERE,GIRDLES,PANTIES,SHIRTS, UNDERSKIRTS.
CLEMENCE GARMENTS CO LTD	MON LOISIR IND. ZONE	RIVIERE DU REMPART	4127344/878 4017030	4017031	READY-MADE GARMENTS(TROUSERS,JEANS,SHORTS)
CO-FERSEN LTD	SAVANNAH SUGAR ESTATE	L'ESCALIER	6367618/7308	6367308	POLO SHIRTS,DRESSES,SKIRTS,TROUSERS, SHORTS,BLOUSES
CORONA CLOTHING CO LTD	LA BRASSERIE ROAD	FOREST SIDE	6742613/2615-6753122	6756183	GARMENTS
COTTON COMPTOIR LTD	ESKI RD	PAILLES	2089754/2127204	2127364	LADIES' UNDERWEAR,POLO SHIRTS,T-SHIRTS,BLOUSES,SHORTS,SKIRTS,DRESS SHIRTS,PANTS,JACKETS,SWEAT SHIRTS,TIES,DRESSING GOWN,COATS,HOUSEHOLDLINEN
CREATION ISLE DE CYGNE LTD	NAAZ BDG	BOIS CHERI ROAD, ST PIERRE	4334120		BRASSIERES,SLIPS,BUSTIERS,GUIPIECES, CARACE,PORTE JURATILLE
DALLAS GARMENTS INDUSTRY LTD	49 CALCUTTA STREET	PORT LOUIS	2426203/2413309	2420357	MFG OF SHIRTS & DENIM JEANS, T-SHIRTS, DRESSES, SWEAT SHIRTS, POLO-SHIRTS, JOGGING, UNDERWEARS,BABYWEARS,SPORTSWEAR, BEACHWEARS,& JERSEY SETS FOR KIDS & ADULTS
DAN FASHIONS LTD	ROYAL ROAD	QUARTIER MILITAIRE	4355435/5129	4355436	TROUSERS,SHIRTS
DAVINEX LIMITED	Bois Cheri Road	PETIT VERGER, ST. PIERRE	4334838	4334838	DRESSES,SKIRTS,SWEAT SHIRTS,POLO SHIRTS,T-SHIRTS

NAME	ADDRESS1	ADDRESS2	TELEPHONE	FAX_NO	PRODUCT
DENIM CLOTHING MFG CO LTD	PETIT PAQUET ROAD	MONTAGNE BLANCHE	4375382		MFG OF JEANS,TROUSERS & SHIRTS
EAGLE TEXTILES LTD	130 PAMPLEMOUSSES RD	P LOUIS	2407964	2407964	KNITTED & WOVEN SHIRTS,BLOUSES,JACKETS,T-SHIRTS,POLO SHIRTS,ETC.
EBEN EZER CO LTD	ROYAL ROAD	TOMBEAU BAY	2471177		KNITTED GARMENTS
ELDORADO GARMENTS LTD	6,TRISTAN D'AVENUE	QUATRE BORNES	4251462		SHIRTS,BLOUSES,TROUSERS,JOGGING SUITS
ELGIBOR TEXTILE CO LTD	ROYAL ROAD	RIVIERE DU REMPART	4124847	4129961	MANUFACTURE OF GARMENTS
ELLAND LTD	ROYAL ROAD	ROSE HILL	4542786		LADIES' DRESSES AND CHILDREN'S GARMENTS
NAME	**ADDRESS1**	**ADDRESS2**	**TELEPHONE**	**FAX_NO**	**PRODUCT**
ELY CO LTD	ROYAL RD	POINTE AUX SABLES	2345759/5661/5662	2345705	SHIRTS,BLOUSES,DRESSES MFG OF BAGS & APRONS)
ERE LINGERIE LTEE	464, STAR BUILDING	ROYAL ROAD, MESNIL	6977663	6981660	PYJAMAS,BRASSIERES AND NIGHTWEARS
F.V GARMENTS CO LTD	PETIT PAQUET ROAD	MONTAGNE BLANCHE	4127799		MFG OF T-SHIRTS,POLO SHIRTS
FADIL CONFECTION LTD	ALLEE COMPHRE	CUREPIPE	6703531/7295007	6703532	MFG OF SHIRTS & SKIRTS
FAIRY TEXTILES LIMITED	1,KOENIG ST	CUREPIPE	6745575/6745172	6745172	PRODUCTION OF SHIRTS AND SHORTS INCLUDE MAN. OF GARMENTS EG. TROUSERS,JACKETS,SKIRTS,DRESSES AND CHILDRENWEAR
FATEXMA	RUISSEAU ROAD	MONTAGNE LONGUE	2451088		MANUFACTURE & EXPORT OF CHILDREN'S GARMENTS & GARMENTS IN GENERAL
FIMTEX LTEE	HUGNIN ROAD BUCKINGHAM	STANLEY, ROSE HILL	4544849/3930	4540995	TROUSERS,SKIRTS,BEACHWEAR, BERMUDAS,NIGHTWEAR,JOGGING SUITS,SHORTS, BLOUSES,SHIRTS,JACKETS
FIREMOUNT TEXTILES LTD	ESTATE RD	GOODLANDS	2839810/8894		TROUSERS,PANTS,SHIRTS,LADIES' SHORTS
FIRST GARMENTS LTD	P.O BOX 677	BELL VILLAGE	2134911/12/15 2334911	2334129	SHIRTS,BLOUSES,TROUSERS,JEANS AND OTHER GARMENTS
FISAA TEX LTD	C\O MR. ASSIF RUHOMAUN	DR MANILALL STREET, TERRE ROUGE	2472284,2488284	2488284	SHIRTS
FIT-U GARMENT LTD.	25,JULIEN DESJARDIN ST	CUREPIPE	6746206	6746206	T-SHIRTS AND UNDERWEARS
FLOREAL CASHMERE LTD	C/O FLOREAL KNITWEAR	REUNION SUGAR ESTATE, VACOAS	6863995/6866009/10/11		MANUFACTURE OF CASHMERE AND LAMBSWOOL,PULLOVERS,CARDIGANS, TROUSERS &SKIRTS
FLOREAL KNITWEAR	P.O BOX 45 CUREPIPE	CUREPIPE	6963995-97,6863956/7	6862337	KNITWEAR
FLOREAL MANUFACTURING LTD	EX REUNION S.E	VACOAS	6866009/10/11		KNITTED GARMENTS
FLOREAL TEXTILES	P.O BOX 45 CUREPIPE	CUREPIPE	6963995-97,6863936/7		KNITWEAR
FLORITEX LTD	KURJIBHAI BLDG	LE HOCHET, TERRE ROUGE	2481220/30	2481939	T-SHIRTS,POLO SHIRTS
FORMOSA TEXTILES LTD(CAGOTAI)	C\O ST MALO EXPORTS	ROYAL ROAD,TOMBEAU BAY	2472264-2472641	2412265	T-SHIRTS,TRACKSUITS,BLOUSES, UNDERWEAR,SWIMWEAR

FRANALEX LTD	COAST ROAD, RIAMBEL	SURINAM	6254444	6254300	HIGH QUALITY SCARVES,HATS,GLOVES AND HANDBAGS INCLUDE MAN. OF T-SHIRTS, SHIRTS,POLO-SHIRTS & CAPS.
GAYTREE FASHION LTD	Royal Rd	NEW GROVE	2713101/4132771/6256820		WOOLLEN PULLOVERS
GAYTREE TEXTILES LTD	ROYAL ROAD	NEW GROVE	2713101/4132771/6256820		WOOLLEN PULLOVERS
GEEMA WEAR LTD.	NANAPRAGASSEN STREET	J. KENNEDY STREET, VACOAS	6980729		MAN. OF SHIRTS,SHORTS & TROUSERS
GEORGE MAHADEO IND. LTD	ROYAL ROAD MONT FERTILE	ROSE BELLE	6272678	6272680	TROUSERS,SHORTS,SKIRTS,SAFARI SUITS,POLO SHIRTS,T-SHIRTS,TRACK SUITS
GOODLANDS KNITTERS LTD	MAPOU ROAD	GOODLANDS	2839441/9235		FANCY PULLOVERS
GREENFIELD GARMENTS MFG CO LTD	88A ST EDGAR LAURENT ST	PORT LOUIS	2412895		READY MADE GARMENTS
GROVE INDUSTRIES(F.E.) LTD	BEAU VALLON IND ESTATE	BEAU VALLON	6373592/3/4/5 6310888	6310892	LADIES' WOVEN GARMENTS
H.M. GARMENTS LTD	16 RAJKUMAR GUJADHUR ST	VALLEE PITOT, P LOUIS	2429821		SHIRTS
HESLER MARINE CO LTD	INDUSTRIAL ZONE	ST FELIX, CHEMIN GRENIER	6227900	6228256	MFG OF SHIRTS,BLOUSES,CHILDREN GARMENTS,WATER REPELLANT COATS
HIMAVAN ENTERPRISE	ROYAL ROAD	LAVENTURE, FLACQ	4184400	4184400	MAN. OF KNITTED GARMENTS
HO GARMENTS LTD	35 EMMANUEL ANQUETIL	PORT LOUIS	2404309 2553183	2413708	SHIRTS
HOLLYROOD GARMENTS	OUGROO BUILDING	HOLLYROOD NO. 1, VACOAS	6978413	6781066	KNITTED GARMENTS SUCH AS T-SHIRTS,SHORTS,DRESSES,SWEAT-SHIRTS AND JOGGING SUITS
HONG KONG TEXTILE LTD	INDUSTRIAL ESTATE	COROMANDEL	2335420/5671/5753	2335669	COLLARS,CUFFS,POLO SHIRTS
HONGKONG SHANGHAI KNITTING LTD	INDUSTRIAL ZONE	COROMANDEL	2335368-5298		T-SHIRTS,POLO SHIRTS
I.AMOD CO LTD	G47 ORCHARD CENTRE	QUATRE BORNES	4333787		DRESSES,TROUSERS,SKIRTS,BLOUSES ENSEMBLES
J.L TROPIKO FASHION LTD	ROYAL ROAD	EAU COULEE, CASTEL	6988330/7838	6862451	GARMENTS
J.O.B TEXTILES LTD	MEDIA INDUSTRIAL EST	GOODLANDS	2839700		SHIRTS,SHORTS,UNDERWEAR
JACK TELLOR (INT) LTD	BP 781 BELL VILLAGE	PAILLES	2869703/04,2862163/64	2862965	GARMENTS-POLO SHIRTS,T-SHIRTS,CHEMISIERS,BLOUSES,PANTALONS DAMES, PANTAJUPES,JUDHPURS,SPENCERS, ROBES COMMUNIANTES,CHEMISES GARSONNET EMSEMBLES ENFANTS
JAMISH GARMENTS LTD	LA CROISEE GLEN PARK	LA MARIE, VACOAS	6984300	6984300	HIGH QUALITY LINGERIE
JAUNMALLY & JOOSUB LTD	13,RUE MARCEL L'ETANG	BEAU BASSIN	4643947	4643947	MANUFACTURE OF TIES,BOW TIES AND SCARVES POCHETTES,BOURSE EN SOIE,UMBRELLAS & SHIRTS
JEANSWEAR CO LTD	IND. ZONE	MON LOISIR, R DU REMPART	4127557/4127344	4127425	JEANS,TROUSERS,SHIRTS,DRESSES
K ENTERPRISE LTD	AVENUE SOOBIAH	SOOBIA AVE. REDUIT	4645846	4645846	SHIRTS,SHORTS,BLOUSES,LADIES' UNDERWEAR,T-SHIRTS,POLO PIQUE, BEACHWEAR
K N E CO LTD	MORCELLEMENT RAFFRAY	MOHUNGROO BLDG, SAINT	4337098/2586652		MFG OF T-SHIRTS

KARUBA WEAR LTD	FIRST FLOOR STAGE 04	PIERRE INDUSTRIAL ESTATE, PLAINE LAUZIN	2101050		POLO SHIRTS,T-SHIRTS,SWEAT SHIRTS & BERMUDAS
KAVINDI CO LTD	ROYAL ROAD	SOUILLAC	6255747	6255747	MFG OF T-SHIRTS,POLO SHIRTS
KENTEX GARMENTS (MTIUS) LTD	EX CRYSTAL GARMENTS LTD	CANTON BEL EAU, PAMPLEMOUSSES	2433666/668/690/2434323	2433094	KNITWEAR,READY MADE GARMENTS
KIMCAT LTD	39, AMBROSE ST.	ROSE HILL	4644375	2637202	HAND KNITTED PULLOVERS
KLINE TEXTILES	17,DBM INDUSTRIAL ESTATE	COROMANDEL, PETITE RIVIERE	2334481/82	2334139	MAN. OF SHIRTS & PYJAMAS INCLUDE MAN. OF KNITTED FABRICS,T-SHIRTS,POLOSHIRTS,SWEAT SHIRTS,CARDIGANS AND PULLOVERS.
L.M TEXTILE LTD	INDUSTRIAL ESTATE	199 ROUTE ROYALE, GRNW	2127332/8955		SHIRTS
LA PALETTE LTEE	3 DRAPER AVE	QUATRE BORNES	4549555/4547512	4541542	MANUFACTURE AND PRINTING OF T-SHIRTS,PAREOS,BEACHWEAR AND TABLE-CLOTH
NAME	**ADDRESS1**	**ADDRESS2**	**TELEPHONE**	**FAX_NO**	**PRODUCT**
LA SERENISSIMA LIMITED	MEDIA BUILDING	ROYAL ROAD, QUARTIER MILITAIRE	2123228	2086317	HAND-KNIT PULLOVERS,SHIP MODELS
LE COMPTOIR DE LA BRODERIE	ROUTE ROYALE	GRAND BAIE	2639394/3017	2636831	MFG OF DRESSES,T-SHIRTS,BLOUSES,BED SHEETS,TABLECLOTH,NIGHT DRESSES & CHILDREN'S WEAR
LEO INT'L LTEE	3RD FLOOR, KOOLWANT BLDG	STE URSULE ST, CENTRAL FLACQ	4132357	4132357	MAN. OF JACKET & TROUSERS INCLUDE JOGGING SUITS AND COATS (VESTES).
LEPITI EXPORT LTD	60 PAMPLEMOUSSES ROAD	2ND FLOOR DBM BLDG, STE CROIX	2166281		MAN OF CHILDREN'S GARMENTS
LEW KIM PING & CO LTD	36 DR JOSEPH RIVIERE ST.	P LOUIS	2402697	2428387	KNITTED COLLARS,CUFFS & BASES,WOLLEN & ACRYLIC PULLOVERS
L'INATTENDU LTEE	REETOO BLDG	ROYAL RD, ST JULIEN D'HOTMAN	4165021	4167368	MANUFACTURE OF T-SHIRTS,SHORTS,DRESSES,LEGGINGS FANCY TOPS,SWEAT SHIRTS,JOGGING SUITS.
LINDENWEAR	ROYAL RD	RIVIERE DU REMPART	4124272		POLO SHIRTS,T-SHIRTS,SWEAT SHIRTS,JOGGING SUITS
LONDONIUM FASHION LTD	39 ALLEE BRILLANT	CASTEL	6961061	6973435	TROUSERS,SHIRTS,T-SHIRTS
LORDS AND CASHMERE LTD	ROYAL ROAD	ST PAUL	6956508/6		FINED GAUGE WOOLLEN PULLOVERS KNITTED CARDIGANS,TROUSERS AND SKIRTS
LORDS INDUSTRIAL LTD	LA SOURCE ROAD	CENTRAL FLACQ	4132327	4132266	BLOUSES,SHIRTS,SHORTS AND PANTS
LORENZO BUGATTI CLOTHING	15,AVENUE BELLEROSE	QUATRE BORNES	4655098,4654259		T-SHIRTS,TROUSERS,SHIRTS,SKIRTS AND LEGGINGS
M F M CONFECTION LTD	PADARUTH LANE	LA CAVERNE, VACOAS	6863317/6818-6965683	6865441	DRESSES,SHORTS,PANTS,BLOUSES, SHIRTS,OVERALLS,JACKETS,POLO SHIRTS
M N.F TEXTILES	ROUTE BASSIN	QUATRE BORNES	5261406/7/8	4874488	SHIRTS AND PYJAMAS
MAHE GARMENTS LTD	464, ROYAL ROAD	STAR BUILDING, MESNIL	6977663	6981660	SHIRTS,BLOUSES INCLUDE MFG OF PYJAMAS,NIGHT

					GOWNS,MAILLOTS,SHORTS,BLOOMERS, DESSUS DE LIT,DRAP DE LIT,TAIE D'OREILLER,HOUSSE,FABRIC HAIR SLIDE,SAC EN TISSU,TROUSSE EN TISSU AND SET DE TABLE,UNDERWEARS.
MANUPAN LTEE	STAGE IV-BLOCK D	INDUSTRIAL ESTATE, PLAINE LAUZUN	2088265	2088107	GARMENTS (JEANS,TROUSERS,SKIRTS,DRESSES, SHORTS,JACKETS,PYJAMAS, WORKING CLOTHES,SPORTSWEAR AND UNDER GARMENTS
MARISA BUTTONS(MTIUS) LTD	P.O BOX 771	BELL VILLAGE	2083209	2084158	BUTTONS AND SLIDES
MAURIHAI LTD	SANS SOUCIS	MONTAGNE BLANCHE	4375202-6968378	4375322	MANUFACTURE OF TRACKSUITS,POLO SHIRTS,T-SHIRTS
MAXIWEAR	C/R GLAIEULS & ORCHIDEES	LA COCHEYLE, BAIE DU TOMBEAU	2471457	2473495	T-SHIRTS,LEGGINGS,DRESSES & TROUSERS INCLUDE MAN. OF UNDERWEARS,BEDSHEETS,BERMUDAS,SHORTS AND POLOSHIRTS
MEDAN LTD	ROYAL RD	LONG MOUNTAIN	2452645/44		KNITTED GARMENTS
MEEMAH FASHION INDUSTRY LTD	14 PAUL ET VIRGINIE STREET	PORT LOUIS	2406344	2429334	MANUFACTURE OF LADIES GARMENTS
MEENA KNITWEAR LTD	BRANCH ROAD	NEW GROVE	6274348	6274491	KNITTED PULLOVERS & GARMENTS
MEGAWEAR LTD	1ST FLOOR BLOCK 3	INDUSTRIAL ZONE, COROMANDEL	2330612		T-SHIRTS,POLO SHIRTS,SHIRTS,BLOUSES, & SHORTS
MI. AMEE & CO. LTD	AVENUE PAILLE EN QUEUE	MEDINE, CAMP DE MASQUE	4166133	4166133	TROUSERS,SHIRTS SHORTS,SKIRTS & JACKETS
MIASA FASHION LTD	IND BLDG	CITE MALHERBES 'B', CUREPIPE	6740105	6750724	SHIRTS,BLOUSES,SKIRTS,DRESSES, TROUSERS
MKLEN FASHIONS LTD.	ROYAL ROAD	QUARTIER MILITAIRE	4355435	4355436	MAN. OF GARMENTS
MODE - SOIE CO. LTD	IR LALLAH STREET	FLOREAL	6961879		MAF. OF SILK SCARVES & TIES
MODESTY CO LTD	52,ROYAL ROAD(RAMNARAIN LANE)	COROMANDEL	2336088	2331443	T-SHIRTS,SKIRTS,TROUSERS & DRESSES.
MONTVILLE &CO LTD	MRS KWAN TAT	24 GLADSTONE ST., Q BORNES			READY MADE GARMENTS: BED SHEETS,CHILDREN'S FROCKS,SKIRTS,WOVEN PLASTIC BAGS,SACKS
N.K TEXTILES CO LTD	ROYAL ROAD	8th MILE, TRIOLET	2553183	2413708	T-SHIRTS, POLO SHIRTS, SWEAT SHIRTS & UNDERWEAR
NAFSAH CLOTHING CO LTD	89 ROUTE ST PAUL	PHOENIX	6964172	6964172	MFG OF T-SHIRTS,GARMENTS SUCH AS BLOUSES,SKIRTS,DRESSES,SPORTSWEAR, POLOSHIRTS,SHIRTS,SHORTS & ENSEMBLES
NAPSON`S GARMENTS LTD	PETIT VERGER	ST PIERRE	4334114/1364/1436		TROUSERS,UNIFORMS,POLO SHIRTS,JOGGING SUITS
NEW ISLAND CLOTHING CO LTD	BOUNDARY ROAD	QUATRE BORNES	4547241	4546833	GARMENTS (SHIRTS,SLACKS,JEANS AND LADIES' BLOUSES)
NEW LOOK LTD	91, ST PAUL ROAD	VACOAS	6986453	6987367	GARMENTS

NIGHTINGALE LTD	2nd FLOOR MADHOO BLDG	ST JEAN RD, Q BORNES	4547571		SHIRTS,LADIES' BLOUSES,VESTS,T-SHIRTS,BELTS,BRAS,GOWNS,GLOVES, GANT DE TOILETS,TROUSERS,UNIFORMS,SKIRTS, PYJAMAS
NIVRA ENT LTD	BOULET BLANC,ROUTE ROYAL	CENTRAL FLACQ	4132310		TROUSERS,UNIFORMS,SHIRTS,BERMUDA SHORTS,JACKETS
NOBLESSE CO LTD	BLK 3 & 4	INDUSTRIAL ZONE, COROMANDEL	2335153/5350/6256252/3		SHIRTS,BLOUSES,SKIRTS,TROUSERS, BOXER SHORTS
NOVEL GARMENTS LTD	15 DBM BLDG	INDUSTRIAL ZONE, COROMANDEL	2425932/70 2338024/27	2338028	JEANS,JACKETS,SHIRTS
O.K.G. CO. LTD.	LA CROISEE GLEN PARK	VACOAS	6969191	6969191	TROUSERS AND SHIRTS
ORIGINAL CONFECTION LTD	ROYAL RD	TOMBEAU BAY	2472866/7/8/2419232/3/4		T-SHIRTS,UNDERWEAR,POLO SHIRTS
OSY GARMENTS LTD	C/O MR IMRAN HANSA	9 BOUNDARY ST, R HILL	4541023		SHIRTS,LADIES' BLOUSES,SHORTS,BLOUSES,TROUSERS, DRESSES
OVERSEAS FASHION LTD	PLOT NO 7	INDUSTRIAL ESTATE, COROMANDEL	2335483/4/6		KNITTED GARMENT AND PLASTIC BAGS
OVERSEAS GARMENT LTD	ROYAL ROAD	ROCHES NOIRES, R DU REMPART	4115064/5/6/7	4115069	HAND KNIT PULLOVERS,JACKETS,BLOUSES,TOPS COATS,SUITS,T-SHIRTS,SWEAT SHIRTS,PYJAMAS,NIGHTWEAR,HOUSE-COATS,SHORTS,TROUSERS,SHIRTS, DRESSES
PALMAR LTEE	VIRGINIE IND. ESTATE	CENTRE DE FLACQ	4132641		READY MADE GARMENTS (JEANS,JACKETS,BLOUSES,WORK BLOUSES)
PALMIRA LTEE	BLOCK C24 ,IND. ESTATE	COROMANDEL	2334558		MANUFACTURE OF SHIRTS,DRESSES & SHORTS
PAUL DE VENCE LTD	PAILLES		2082163/64/2127169	2122965	PRODUCTION OF UNDERWEAR(LINGERIE),TROUSERS, BERMUDAS
PERATEX LTEE	AVENUE JOHN KENNEDY	VACOAS	6976169	6976170	MAN. OF LADIES' UNDERWEAR SUCH AS BRAS,BRIEFS AND KNICKERS
PHERVIN TEXTILES CO LTD	10 RESERVES ST	LES SALINES, P LOUIS	2101417	2345494	MFG OF MEN'S WEAR(TROUSERS,SHORTS,VESTS) & LADIES' WEAR & CHILDREN'S GARMENTS
PHOENIX KNITTING LTD	V\PHOENIX INDUSTRIAL ESTATE	PHOENIX	6967993/4/5	6967996	KNITTED FABRICS,KNITTED GARMENTS SUCH AS POLO SHIRTS,T-SHIRTS, PYJAMAS,SPORTSWEAR,LADIES' DRESSES
NAME	**ADDRESS1**	**ADDRESS2**	**TELEPHONE**	**FAX_NO**	**PRODUCT**
PHOENIX WEAR LTD	PONT FER	PHOENIX	6862257/6962486	6962488	LADIES' GARMENTS
PROMINTEX CO.LTD	C\O AQUARELLE CLOTHING LTEE	STE ANNE ROAD,STANLEY, ROSE HILL	4656194/4656036/4656892	4642082	MANUF. OF SHIRTS & BLOUSES,TROUSERS,SHORTS,PYJAMAS, SKIRTS,BEDSHEETS,PILLOW CASES,TSHIRTS & POLO SHIRTS
PROSIMEX INDUSTRIAL CO.LTD	DOZEKHEE BLDG.	ROYAL RD, LALLMATIE	4183321/3319/3322		POLO SHIRTS,SPORTSWEAR (JOGGING SUITS),SHORTS,T-SHIRTS
QUALITEX CO LTD	48 JOSEPH RIVIERE ST	PORT LOUIS	2124926	2429952	T-SHIRTS,POLO SHIRTS,PAREO,SHORTS

QUEENSWEAR LTD	STAGE V, D.B.M BUILDING	PLAINE LAUZUN	2109661	2109440	MAN. OF SPORTSWEAR,SHIRTS,JACKETS,BLOUSES,TROUSERS,UNDERWEAR,DRESSES& TOWELS. INCLUDE KNITTING AND DYEING OF FABRICS
R.E.A L. GARMENTS	66,GLADSTONE STREET	ROSE-HILL	4660398,4660529	4650181	MANUFACTURE OF SHIRTS,SKIRTS AND TROUSERS
RAVI FASHION LTD	ARCADES BHOLAH	ROSE HILL	4547916		SHIRTS,TROUSERS,BLOUSES
RICHFIELD TEXTILES LTD	K. RAMJI IND. ESTATE	LE HOCHET, TERRE ROUGE	2489676-79		KNITTING AND DYEING OF GARMENTS
ROSSANA TEXTILES LTD	TARA BLDG.	IND. ESTATE, P LAUZUN	2123715/16/2902-6964216		CARDIGANS,VESTS,JACQUARD,PULLOVERS,SLIPOVERS,SKIRTS,SWEATSHIRTS, POLO-SHIRTS,WOVEN GARMENTS,T-SHIRTS
RS FASHION LTD	ROYAL ROAD	QUARTIER MILITAIRE	4355435/5129	4355436	TROUSERS AND SHIRTS
S.A.V. GARMENTS	OPPOSITE HEALTH CENTRE	MONTAGNE BLANCHE	4374588	4374588	SPORTSWEAR
S.V.U LTD	ROYAL ROAD	L`ESCALIER	6367565		SHIRTS,PYJAMAS,TROUSERS,BERMUDAS, SHORTS
SAFCO MODE LTEE	MAPOU LECLEZIO	GOODLANDS	2839719/20	2839227	GARMENTS
SEASONS GARMENTS CO LTD	ARCADES JAULIM	ROYAL ROAD, ROSE HILL	4355046/4645048		SHIRTS,TROUSERS,SHORTS,SALOPETTES,GILETS,BLOUSES,VESTS,T-SHIRTS, POLO SHIRTS,SKIRTS,TRACKSUITS
SENTOSA ENTERPRISES LTD	ROYAL ROAD	FOND DU SAC	2661962/3/4/5	2661958	T-SHIRTS,POLO SHIRTS,DRESSES,TROUSERS,SKIRTS
SERIPRINT 2000 LTD	SOLFERINO NO 2	BONNE TERRE, VACOAS	4265763/3041		MANUFACTURE AND PRINTING OF T-SHIRTS AND PAREOS
SHIBANI KNITTING LTD	BLOCK A	PHOENIX IND ESTATE	4543051/52 6967983/4/5	6967986	FANCY KNITTED GARMENTS
SINOTEX (MTIUS) LTD	CROISEE MONTAGNE LONGUE	TERRE ROUGE	2488100/02/01	2488280	READY-MADE GARMENTS AND PULLOVERS
SISSI CREATIONS LTEE	AVENUE ST JOSEPH	MONTAGNE BLANCHE	4375542	4375542	BABIES' GARMENTS (BARBOTEUSES,GRENOUILLIERES, BRASSIERES ET CULOTTE HUBLOT
SMOX LTEE	12,CADINOUCHE,CR HASSEN SAKIR	PLAINE VERTE	2426854		MANUFACTURE OF CHILDREN'S GARMENTS,SHIRTS,T-SHIRTS,SHORTS,TROUSERS, BLOUSES & DRESSES
SOFANCY KNITS LTD	ROYAL ROAD	TOMBEAU-BAY	2472264/2641	2472265	UNDERWEAR,T-SHIRTS,POLO SHIRTS
SOLEN SPORTSWEAR LTD EX SAHLAN	ROYAL RD	CHAPMAN HILL, BEAU BASSIN	4543936		SHIRTS,T-SHIRTS,POLO SHIRTS,SPORTSWEAR,TROUSERS,SHORTS
SONIAWEAR LTD	IND. ESTATE	VALENTINA, PHOENIX	6967275	6869864	T-SHIRTS,SHIRTS,LADIES' DRESSES,PAREOS,BERMUDAS,SKIRTS, SHORTS, PYJAMAS,UNDERWEAR,CARDIGANS,SWEAT SHIRTS,JOGGING SUITS
SOUTHERN TEXTILES LTD	ALLEE JACQUES	PLAINE MAGNIEN	6373676/3791	6373792	KNITTED PULLOVERS,KNITTED SHIRTS,JOGGING AND JUMPERS
SPORTEX LTD	ROYAL RD	GOODLANDS	2839229	2839375	POLO SHIRTS

ST. MALO EXPORT LTD	ROYAL ROAD	TOMBEAU BAY	2472264/2641	2472265	MANUFACTURE OF KNITTED GARMENTS SUCH AS T-SHIRTS,DRESSES,BIKINIS, BERMUDAS AND PAREOS
STALLION GARMENTS CO LTD	73 ROYAL RD	PORT LOUIS	2420816		T-SHIRTS,POLO SHIRTS,
STANFORD VIEW	ROYAL ROAD	GOODLANDS	2839035	2472429	POLO SHIRTS & T-SHIRTS
STANTEX INTERNATIONAL LTD	C\0 STAR KNITWEAR	MEDIA BLDG, LA CLEMENCE, RIVIERE DU REMPART	4127418/20/7887		SHIRTS,SHORTS
STAR KNITWEAR LTD	LA CLEMENCE	R D. REMPART	4127418-20/4127887	4127890	T-SHIRTS,POLO SHIRTS,KNITTING TRACKSUITS,KNIT-TOPS,JOGGING SUITS, DRESSES,SLEEPWEAR,BLOUSES,SHIRTS
STE ANNE CLOTHING LTD	STE ANNE ROAD	STANLEY, ROSE HILL	4647884/7924/7918 4642082		MAF. OF SHIRTS
STREET WEAR CO LTD	9,NAPPIER BROOM ST	BEAU BASSIN	4664923	4647644	T-SHIRTS,POLO-SHIRTS,BERMUDAS & SKIRTS
STYLISH KNITS LTD	TERMINUS	ROYAL ROAD, TRIOLET	2616631/6715/6392	2615226	PULLOVERS
SUMMIT KNITWEAR LTD	6TH FLOOR, WING FAT BUILDING	22,JUMMAH MOSQUE STREET, P LOUIS	2425051/2/2423613	2408271	MANUFACTURE OF SHETLAND AND POLYSTER PULLOVERS,LUTHREX SPRING PULLOVERS,AND LADIES HIGH FASHION JUMPERS
SUNLINE LTD	NEW ROAD	QUARTIER MILITAIRE	4127418-20/7887/4355060/61	4127890	SHIRTS,TROUSERS,BLOUSES,SKIRTS, UNDERWEARS,DRESSES,SHORTS
SUPER TEXTILES LTD.	LOT 24, INDUSTIRAL ESTATE	COROMANDEL	2330519,2340080		T-SHIRTS,POLOSHIRTS,SWEAT SHIRTS AND SHIRTS
SWEAT SUN LTEE	FREDERICK BONNEFIN ST	FOREST SIDE	6757165/6742148-51	6757166	SWEAT SHIRTS,POLO SHIRTS,T-SHIRTS,KNITTED VESTS,JOGGING SUITS, KNITTED DRESSES
TAN UNION FASHION LTD	3,COCOTERIE ROAD	ROCHE-BOIS	2424543/2802	2400132	POLO SHIRTS,T-SHIRTS INCLUDE GARMENTS e.g. SHIRTS,VESTES,LEGGINGS,SWEATERS,TOPS,JOGGING SUITS,SKIRTS & CARDIGANS
TANG KNITWEAR LTD	5th MILE	BEAU BASSIN	4672810	4547593	T-SHIRTS,SWEAT SHIRTS,POLO SHIRTS
TANGARA KNITTING FACTORY LTD	PETIT VERGER BRANCH RD	PETITE RIVIERE	2335433-2641041/044/23	2336511	SWEAT SHIRTS,JOGGING SHIRTS,TRACK SUITS,T-SHIRTS,JACKETS,SPORTS, TROUSERS
TARA KNITWEAR LTD	TARA BUILDING	PLAIN LAUZUN IND.EST, P LOUIS	2123715/2901/2-2335433-2641044		WOOLLEN KNITWEAR
TEE SUN LTD	INDUSTRIAL ZONE	MON LOISIR, R.D REMPART	4127401/2/4	4127405	T-SHIRTS,POLO SHIRTS,SWEAT SHIRTS,JOGGING OUTFITS,SKIRTS
TEXAMON CO LTD	ROYAL RD	SOUILLAC	6256252-53/6255600	6256254	SHIRTS,TROUSERS,POLO SHIRTS
TEXTILE INDUSTRIES LTD	MARE GRAVIER	BEAU BASSIN	4646336		GARMENTS (POLO SHIRTS)
TEXTO LTEE	CNR OF BERNARDIN DE ST PIERRE	& MARJOLIN STS, P LOUIS	2419232	2160928	KNITTED GARMENTS SUCH AS T-SHIRTS,POLO SHIRTS,SWEAT SHIRTS,DRESSES, SKIRTS & CARDIGANS
NAME	**ADDRESS1**	**ADDRESS2**	**TELEPHONE**	**FAX_NO**	**PRODUCT**
THE ARVIND	LA TOUR KOENIG	POINTE AUX SABLES	2345000 - 5	2345005	MAN. OF YARN, DENIM FABRICS, DENIM

OVERSEAS(MTIUS) LTD					JEANS
TRANSPACK LTD	PHOENIX INDUSTRIAL ESTATE	LA VIGIE, PHOENIX	4544913/15/6967946/7/8	6967949	T-SHIRTS,POLO SHIRTS,DYEING OF FABRICS (COTTON OR MAINLY COTTON COMPOSITION)
TROPIC KNITS LTD	LA MARIE ROAD	QUINZE CANTONS, VACOAS	6961016/1024/3956	6964726	KNITTED GARMENTS,DRESSES,TABLE-CLOTH,JOGGING SUITS,SHORTS,BERMUDAS
TROUBADOUR LTEE	BOUTIQUE COCO	RICHE MARE, CENTRAL FLACQ	4130290	4130290	MAN. OF GARMENTS
TUBE TEXTILE LTD.	AJGAYBEE BUILDING,	ROYAL ROAD, DAGOTIERE	4334268	4334268	T-SHIRTS,TROUSERS,SHORTS AND SHIRTS
TWEED LTD	SAVANNE RD	NOUVELLE FRANCE	6778667/9532		GARMENTS
ULTRA CONFECTION CIE LTEE	15,DHUNY LANE	ST. PAUL	6965120	6866808	GARMENTS,BEDSHEETS,PAREOS, TABLECLOTHS,LINEN BAGS,PRINTING OF FABRICS GARMENTS,HEADWEAR AND "GANTS DE TOILETTE"
UNITED KNITTERS LTD	ATT. MISS SEENYEN	P.O BOX 670, P LAUZUN	2083558/59-21250712088312-5	2080721	KNITTED GARMENTS
VICTORY EXPORTS LTD	139,ROYAL ROAD	BEAU BASSIN	4546927/8007/2126352	4546927	KNITTED SPORTSWEAR,CASUAL WEAR,BABYWEAR,CHILDREN'S WEAR
VOGUE ALLEY CO LTD	KURJIBHAI RAMJI BLDG	LE HOCHET, TERRE ROUGE	2480198		GARMENTS (T-SHIRTS,ETC.)
VOLTAMEX	INDUSTRIAL BUILDING	CITE MALHERBES B, CUREPIPE	6740105	6750724	WOVEN GARMENTS SUCH AS SHIRTS,SHORTS,BLOUSES & KIDSWEAR
WINBRIGHT(PTY)LTD(UNI APPAREL)	LA SOUDINE	L'ESCALIER	6368888/7685		T-SHIRTS
WORLD KNITS LTD	INDUSTRIAL ZONE	ST PIERRE	4334635/1945/0124		MANUFACTURE OF EMBROIDERED GARMENTS,TABLECLOTHS,NAPKINS KNITTED & WOVEN GARMENTS SUCH AS SHIRTS,SHORTS,TROUSERS,T-SHIRTS,POLO SHIRTS, LEGGINGS & DRESSES

Annex 4: Institutions and Associations in the Cotton and Textiles Sector

Organisation	Address	Tel	Fax	Email	Website	Contact
Export Processing Zone Development Authority (EPZDA)	St. Denis Street, Port Louis	(230) 2129760	(230) 2129767	epzda@intnet.mu	http://epzda.intnet mu	Mr Alain Chan Sun
Mauritius Industrial Development Authority (MIDA)	Level 2, BAI Building, 25, Pope Hennessy St, Port Louis	(230) 2087750	(230) 208 5965	mida@media.intnet mu	www mauritius-exports.com	Mrs Elizabeth Ah Chong
Small and Medium Industries Development Organisation (SMIDO)	Industrial Zone, Coromandel	(230) 2335030	(230) 2335545	smido@intnet.mu	www.intnet mu/smido	Mr Vasant Appanah
Mauritius Export Processing Zone Association (MEPZA)	6th Floor, Unicorn House, Royal Road, Port Louis	(230) 2085216	(230) 2121853	info@mepza.org	www mepza.org	Mrs Danielle Wong
Mauritius Chamber of Commerce and Industry (MCCI)	3, Royal Street, Port Louis	(230) 2083301	(230) 2080076	mcci@intnet mu	www mcci.org	Mr Mahmood Cheeroo
Association of Mauritian Manufacturers (AMM)	3, Royal Street, Port Louis	(230) 2083301	(230) 2080076	mcci@intnet mu	www mcci.org	Mr Jacques Li Wan Po

Annex 5: Total Imports COMESA - SADC Countries 2000-2003

Total Imports	2000		2001		2002		2003	
Country	Volume (Kg)	Value CIF (US$)	Volume (Kg)	Value CIF (US$)	Volume (Kg)	Value CIF (US$)	Volume (Kg)	Value CIF (US$)
BOTSWANA	20,043.00	11,939.00	51,038.00	100,361 38	152,661.00	535,693.47	31,567.00	113,980 13
CONGO	781.00	235,653.49	1,447.00	742,648 31	44,654.00	710,602.55	678.00	341,952.00
DJIBOUTI		-	25.00	138.62		-	1.00	63.00
EGYPT	5,990,688.00	5,910,851.22	11,932,011.00	9,949,682.12	4,914,740.00	10,202,980.27	31,490,739.00	14,212,257.96
FEDERAL ISLM. REP OF COMOROS	185.00	1,030.46	116.00	1,826.85	12,458.00	73,384.82	19,675.00	750,711 57
KENYA	3,766,083.00	2,435,688.91	1,984,867.00	2,922,704.32	1,520,628.00	2,558,764 27	3,349,339.00	3,775,085.95
KINGDOM OF LESOTHO		-		-	734.00	2,515.81	377.00	1,683 12
KINGDOM OF SWAZILAND	776,533.00	5,569,635.23	695,003.00	7,354,012.32	772,625.00	7,863,162.70	551,623.00	8,014,472.79
MADAGASCAR	126,798,357.00	31,465,358.53	108,354,453.00	32,059,093.72	51,187,628.00	22,540,574.41	216,821,288.00	51,582,316.52
MALAWI	896,072.00	1,023,577.66	768,658.00	1,010,200.45	88,405.00	45,603.70	278,013.00	190,155 91
MOZAMBIQUE	36,600,806.00	1,812,244.27	2,047,203.00	787,763.68	162,490,294.00	7,608,927 99	114,041,796.00	4,882,860.88
NAMIBIA	256,575.00	254,613.58	480,881.00	273,223 18	916,365.00	538,974.06	522,943.00	394,223 53
SEYCHELLES	1,155,533.00	908,430.80	5,738,589.00	4,634,128.97	13,791,749.00	33,488,730.39	5,582,241.00	7,987,250.15
SOCIALIST ETHOPIA	6,799.00	15,469.61	7,791.00	17,965.84	8,585.00	17,955.68	10,177.00	29,872.25
SOUTH AFRICA	843,722,642.00	292,444,277.88	879,509,308.00	263,686,994.25	582,021,896.00	274,137,207.32	514,199,655.00	295,328,708.27
SUDAN	217,248.00	255,769.99	32,232.00	20,403.92	35.00	279.61	3.00	252.24
TANZANIA	683,959.00	919,849.25	1,634,431.00	2,897,831.15	319,646.00	706,217.90	498,685.00	733,199 91
UGANDA		-	51.00	409.04	38,400.00	86,883.77	103,648.00	157,767 38
ZAMBIA	59,300.00	177,932.23	755,168.00	2,092,957.30	3,128,719.00	7,394,433 97	2,213,366.00	5,793,450.57
ZIMBABWE	2,077,311.00	6,688,937.40	1,152,499.00	3,746,083.24	1,038,233.00	2,506,602.07	1,964,786.00	2,419,251.03
Total Imports Comesa	**1,023,028,915.00**	**350,131,259.51**	**1,015,145,771.00**	**332,298,428.65**	**822,448,455.00**		**891,680,600.00**	**396,709,515.14**

- SADC Countries						**371,019,494.76**		

Annex 6: Total Domestic Exports by ESA Countries 2000-2003

Domestic - Exports	**2000**		**2001**		**2002**		**2003**	
Countries	**Volume (kg)**	**Value FOB (US$)**	**Volume (kg)**	**Value FOB (US$)**	**Volume (kg)**	**Value FOB (US$)**	**Volume (kg)**	**Value FOB (US$)**
ANGOLA		-	650	2,646	10,776	55,647		-
BOTSWANA	15,124	60,790	117,748	302,963	29,157	59,093	80,976	204,916
BURUNDI	917,642	190,040	1,191,138	284,947		-	1,920,000	501,131
CONGO	24,971	14,512	19,347	27,660	35,025	73,829	7,324,795	4,183,711
DJIBOUTI	821	816		-		-		-
EGYPT	20,260	15,135	981,391	461,055	602,195	187,854	880,996	439,608
FEDERAL ISLM. REP OF COMOROS	1,006,580	571,659	2,851,998	1,262,064	3,814,927	1,570,541	3,659,558	2,085,605
KENYA	8,209,277	2,938,114	7,689,315	5,173,952	4,362,932	5,868,935	5,022,215	6,524,257
KINGDOM OF LESOTHO	202,180	510,473		-	372	5,553	15,082	56,585
KINGDOM OF SWAZILAND		-	288,692	8,748	10	70		-
MADAGASCAR	41,780,697	56,356,886	59,191,866	66,601,139	35,599,234	26,960,337	39,487,972	41,063,900
MALAWI	5,230,406	1,170,860	55	1,501	1,012,142	228,088	773,910	231,660
MOZAMBIQUE	138,751	567,712	198,985	565,250	148,937	461,948	229,683	886,836
NAMIBIA	53	4,573	97	1,525	2	6,589	17,318	10,146
SEYCHELLES	4,546,807	3,159,518	6,198,812	3,069,320	6,304,145	5,063,662	5,759,442	3,732,910
SOCIALIST ETHOPIA	30	460		-	1,344	11,350	8,631	38,515
SOUTH AFRICA	3,128,685	5,773,427		-	10,355,557	14,146,402	10,282,306	21,420,321
SUDAN		-	648	2,907	332	3,099		-

TANZANIA	6,002,390	2,123,958	4,157,474	2,160,505	2,488,018	1,469,326	1,461,170	1,719,573
UGANDA	4,266,440	702,861	1,232,111	345,181		-	184,591	161,841
ZAMBIA	75,776	128,609	779,136	262,842	1,590,244	412,358	2,040,888	958,205
ZIMBABWE	1,827,686	5,317,609	1,733,125	5,841,939	1,022,214	3,709,819	1,473,293	2,423,672

Annex 7: Total Exports of Cotton, Yarn and Textile products 1998- 2003

Total Export 1998- 2003		**1998**		**1999**		**2000**		**2001**		**2002**		**2003**	
HS	**COMMODITY DESCRIPTION**	**Volume (kg)**	**Value FOB (US$)**	**Volume (kg)**	**Value FOB (US$)**	**Volume (kg)**	**Value FOB (US$)**	**Volume (kg)**	**Value FOB (US$)**	**Volume (kg)**	**Value FOB (US$)**	**Volume (kg)**	**Value FOB (US$)**
52010000	Cotton, not carded or combed.	258	3,911	235	3,146.59		-	132	1,502	742	5,483	2,108	4,592.62
52030000	Cotton, carded or combed.	48,525	348,928	23953	111,982.77	94,857	563,346	208,573	1,195,602	18,418	102,767		-
Total Cotton		**48,783**	**352,839**	**24,188**	**115,129.36**	**94,857**	**563,346**	**208,705**	**1,197,104**	**19,160**	**108,251**	**2,108**	**4,592.62**
52041100	Cotton sewing thread, with >=85% cotton, not put up for retail sale	885	8,924	1,858	7,568.41	4,964	30,247	46,238	285,533	15,815	123,412	29,681	202,826.97
52051100	Uncombed single cotton yarn, with >=85% cotton, nprs, <=14mn	284,311	1,705,205	230,154	1,079,090.09	232,699	1,234,497	521,754	2,253,227	115,192	283,986	229,905	668,040.26
52061100	Uncomb single cotton yarn, with <85% cotton, nprs, <=14mn	7,777	56,211	5,746	31,265.11	4,532	28,171	2,925	15,183	19,986	144,747		-
52061200	Uncombed single cotton yarn, with <85% cotton, nprs, >14mn but <=43mn		-		-		-		-		-	3,927	21,400.89
52071000	Cotton yarn (excl. sewing), put up for retail sale, with >=85% cotton	5,682	56,854	3,965	7,412.13		-		-		-		-
52079000	Cotton yarn (excl. sewing), put up for retail sale, with <85% cotton		-		-	49,378	157,844	5,059	20,294	33,437	111,197	66,370	95,912.29
Total Yarn		**298,655**	**1,827,194**	**241,723**	**1,125,335.74**	**291,573**	**1,450,760**	**575,976**	**2,574,237**	**184,430**	**663,341**	**329,883**	**988,180.40**
52081100	Unbleached plain cotton weave, with >=85% cotton, =<100g/m2	48,993	633,800	8317	9,687.92	5,234	16,635	13,820	93,064	348	1,429	1,418	11,603.29
52091100	Unbleached plain cotton weave, with >=85% cotton, >=200g/m2	10	138		-		-		-	2,131	29,665	11,998	19,618.33
52091200	Unbleached 3 Or 4-thread Twill (incl. Cross Twill), With >=85% Cotton		-		-	70	214		-	8,450	37,673		-
52091900	Unbleached Cotton Fabrics, With >=85% Cotton, >=200g/m2, Nes		-	5371	97,842.41	12,205	59,004	13,001	75,342	1,682,748	6,024,710	1,626,928	5,831,052.29
52111100	Unbleached Plain Cotton Weave, With <85% Cotton, >200g/m2		-		-		-		-	794	10,627	264	6,517.27
52111900	Unbleached woven cotton fabrics, nes, with <85% cotton, >200g/m2	141	1,174	5	40.70	2,544	13,150	6,464	7,419	3,949	2,673	17,192	86,422.59
52112900	Bleached woven cotton fibres, nes, with <85% cotton, >200g/m2		-		-		-		-		-	560	5,643.52
52121100	Unbleached woven fabrics of cotton, =<200g/m2, nes	621	27,146		-	160	2,186	72,411	666,110	20,102	169,878	3,000	90,529.85
52121200	Bleached Woven Fabrics Of Cotton, =<200g/m2, Nes		-	4	50.15		-		-		-		-
Total Fabrics		**49,765**	**662,258**	**13,697**	**107,621.18**	**20,213**	**91,189**	**105,696**	**841,935**	**1,718,522**	**6,276,655**	**1,661,360**	**6,051,387.14**

Annex 8: Total Consumption of Cotton, Yarn and Textile products 1998-2003

		1998		1999		2000		2001		2002		2003	
HSCODE	**DESC**	**Volume (kg)**	**Value(US$)**	**Volume (kg)**	**Value(US$)**	**Volume (kg)**	**Value(US$)**	**Volume (kg)**	**Value(US$)**	**Volume (kg)**	**Value(US$)**	**Volume (kg)**	**Value(US$)**
52010000	Cotton, not carded or combed	13,612,678	26,069,999	9,647,543	16,838,378	13,717,671	17,278,736	10,585,900	17,600,360	8,913,328	11,784,726	11,646,397	16,218,104.80
52030000	Cotton, carded or combed	1,186,254	3,618,582	408,546	1,481,223	409,723	1,250,335	428,995	1,440,998	1,105,603	2,797,405	1,055,399	2,720,224.74
Total		**14,798,932**	**29,688,581**	**10,056,089**	**18,319,601**	**14,127,394**	**18,529,071**	**11,014,895**	**19,041,358**	**10,018,931**	**14,582,131**	**12,701,796**	**18,938,330**
52041100	Cotton sewing thread, with >=85% cotton, not put up for retail sale	54,851	273,675	2,046	24,165	21,691	66,968	148,967	1,230,636	233,125	1,774,058	76,544	656,527.90
52041900	Cotton Sewing Thread, With <85% Cotton, Not Put Up For Retail Sale	113,271	1,060,159	99,426	924,342	60,308	529,810	43,234	451,015	39,924	402,860	38,201	335,838.92
52051100	Uncombed Single Cotton Yarn, With >=85% Cotton, Nprs, <=14mn	4,824,857	19,142,432	5,008,642	16,862,992	10,323,435	26,022,467	10,612,728	25,433,209	9,311,386	21,455,336	7,847,494	18,586,988.08
52061100	Uncomb Single Cotton Yarn, With <85% Cotton, Nprs, <=14mn	65,542	518,661	48,868	454,538	43,351	286,793	41,078	316,049	98,212	640,058	88,400	612,191.41
52071000	Cotton yarn (excl. sewing), put up for retail sale, with >=85% cotton	1,427,744	3,578,856	2,190,255	4,258,938	243,866	717,186	189,978	692,907	4,462	27,692	19,672	114,492.85
Total		**6,486,265**	**24,573,784**	**7,349,237**	**22,524,975**	**10,692,651**	**27,623,224**	**11,035,985**	**28,123,815**	**9,687,109**	**24,300,004**	**8,070,311**	**20,306,039.16**
52081100	Unbleached plain cotton weave, with >=85% cotton, =<100g/m9	124,876	974,948	19,704	290,269	20,837	289,033	23,976	321,445	10,250	229,295	13,071	174,134.72
52091100	Unbleached plain cotton weave, with >=85% cotton, >=200g/m6	6,788	31,134		-	24,166	168,308	8,621	23,481	566	6,465	5,141	28,342.95
52111100	Unbleached plain cotton weave, with <85% cotton, >200g/m2	76,004	451,357	777,050	3,333,083	600,269	2,648,754	361,572	1,697,128	284,428	935,218	184,984	913,936.89
52121100	Unbleached woven fabrics of cotton, =<200g/m2, nes	20,737	122,444	11,750	61,773	7,586	22,745	18,078	81,407	25,375	128,883	13,352	49,146.82
Total		**228,405**	**1,579,883**	**808,504**	**3,685,125**	**652,858**	**3,128,840**	**412,247**	**2,123,460**	**320,619**	**1,299,862**	**216,548**	**1,165,561.38**

Annex 9: Total Exports of Cotton, Yarn and Textile products in ESA Countries by HS Code in 2003

HS CODE	DESCRIPTION	COUNTRY OF DESTINATION	UNIT	QUANTITY	FOB (Rs)
COTTON					
52010000	Cotton, not carded or combed.	SEYCHELLES	2	2,108	125,250
Total Cotton				**2,108**	**125,250**
YARN					
52051100	Uncombed single cotton yarn, with >=85% cotton, nprs, <=14mn	BOTSWANA	2	11,029	719,240
52052100	Combed single cotton yarn, with >=85% cotton, nprs, <=14mn	BOTSWANA	2	7,530	582,460
52052200	Combed single cotton yarn, with >=85% cotton, nprs, >14mn but <=43mn	BOTSWANA	2	90,728	5,486,035
52041900	Cotton sewing thread, with <85% cotton, not put up for retail sale	MADAGASCAR	2	2,429	541,309
52042000	Cotton sewing thread, put up for retail sale	MADAGASCAR	2	43,507	7,459,759
52051100	Uncombed single cotton yarn, with >=85% cotton, nprs, <=14mn	MADAGASCAR	2	18,572	1,384,529
52052100	Combed single cotton yarn, with >=85% cotton, nprs, <=14mn	MADAGASCAR	2	20,204	2,675,104
52052300	Combed single cotton yarn, with >=85% cotton, nprs, >43mn but <=52mn	MADAGASCAR	2	35,114	9,759,680
52052600	Single yarn of combed fibres between 125 decitex and 106.38 decitex	MADAGASCAR	2	122	5,988
52053200	Uncombed cabled cotton yarn, with >=85% cotton, nprs, >14mn but <=43mn	MADAGASCAR	2	1,675	286,177
52053500	Uncombed cabled cotton yarn, with>=85% cotton, nprs, >80mn	MADAGASCAR	2	45,102	5,496,192
52054100	Combed cabled cotton yarn, with >=85% cotton, nprs, <=14mn	MADAGASCAR	2	8,392	440,311
52054200	Combed cabled cotton yarn, with >=85% cotton, nprs, >14mn but <=43mn	MADAGASCAR	2	12	9,652
52054400	Combed cabled cotton yarn, with >=85% cotton, nprs, >52mn but <=80mn	MADAGASCAR	2	26,495	3,709,324
52054600	Multiple or cabled yarn measuring more than 106.38 decitex	MADAGASCAR	2	255	44,183
52061200	Uncombed single cotton yarn, with <85% cotton, nprs, >14mn but <=43mn	MADAGASCAR	2	3,927	583,645
52062500	Combed single cotton yarn, with <85% cotton, nprs, >80mn	MADAGASCAR	2	5,029	1,191,529
52064200	Combed cabled cotton yarn, with <85% cotton, nprs, >14mn but <=43mn	MADAGASCAR	2	6,940	532,162
52079000	Cotton yarn (excl. sewing), put up for retail sale, with <85% cotton	MADAGASCAR	2	2,000	322,868
52041900	Cotton sewing thread, with <85% cotton, not put up for retail sale	SEYCHELLES	2	161	9,000

52042000	Cotton sewing thread, put up for retail sale	SEYCHELLES	2	344	156,204
52051200	Uncombed single cotton yarn, with >=85% cotton, nprs, >14mn but <=43mn	SEYCHELLES	2	120	35,000
52041100	Cotton sewing thread, with >=85% cotton, not put up for retail sale	SOUTH AFRICA	2	2,052	340,220
52041900	Cotton sewing thread, with <85% cotton, not put up for retail sale	SOUTH AFRICA	2	2,850	773,683
52051100	Uncombed single cotton yarn, with >=85% cotton, nprs, <=14mn	SOUTH AFRICA	2	44,572	2,645,569
52052100	Combed single cotton yarn, with >=85% cotton, nprs, <=14mn	SOUTH AFRICA	2	19,848	1,509,458
52052200	Combed single cotton yarn, with >=85% cotton, nprs, >14mn but <=43mn	SOUTH AFRICA	2	28,548	317,853
52052300	Combed single cotton yarn, with >=85% cotton, nprs, >43mn but <=52mn	SOUTH AFRICA	2	38,583	11,526,752
52052400	Comb single cotton yarn, with >=85% cotton, nprs, >52mn but <=80mn	SOUTH AFRICA	2	953	88,262
52079000	Cotton yarn (excl. sewing), put up for retail sale, with <85% cotton	SOUTH AFRICA	2	36	6,319
TOTAL Yarn				**467,129**	**58,638,467**
FABRICS					
52094200	Denim, with >=85% cotton, >=200g/m2	BOTSWANA	2	33,028	1,642,779
52081200	Unbleached plain cotton weave, with >=85% cotton, >100g/m2 but <200g/m2	COMOROS	2	125	31,570
52085900	Printed woven cotton fabrics, with >=85% cotton, nes	COMOROS	2	10,235	2,607,620
52101900	Unbleached woven cotton fabrics, nes, with <85% cotton, =<200g/m2	COMOROS	2	3,525	682,560
52115900	Printed woven cotton fabrics, nes, with <85% cotton, >200g/m2	COMOROS	2	10,499	2,372,764
52121300	Dyed woven fabrics of cotton, =<200g/m2, nes	COMOROS	2	35	8,377
52122500	Printed woven fabrics of cotton, >200g/m2, nes	COMOROS	2	1,449	202,581
52094200	Denim, with >=85% cotton, >=200g/m2	EGYPT	2	23,115	3,455,563
52091900	Unbleached cotton fabrics, with >=85% cotton, >=200g/m2, nes	KENYA	2	360,508	32,318,462
52094200	Denim, with >=85% cotton, >=200g/m2	KENYA	2	329,440	27,411,074
52094200	Denim, with >=85% cotton, >=200g/m2	KINGDOM OF LESOTHO	2	15,036	1,517,574
52081100	Unbleached plain cotton weave, with >=85% cotton, =<100g/m2	MADAGASCAR	2	1,376	310,766
52081900	Unbleached woven cotton fabrics, nes, with >=85% cotton	MADAGASCAR	2	5,263	757,912
52082900	Bleached woven cotton fabrics, nes, with >=85% cotton	MADAGASCAR	2	96,138	10,420,872
52083100	Dyed plain cotton weave, with >=85% cotton, =<100g/m2	MADAGASCAR	2	15,991	679,078
52083200	Dyed plain cotton weave, with >=85% cotton, >100g/m2	MADAGASCAR	2	4,000	691,634

52083900	Dyed woven cotton fabrics, with >=85% cotton, nes	MADAGASCAR	2	61,985	5,565,749
52084100	Coloured plain cotton weave, with >=85% cotton, =<100g/m2	MADAGASCAR	2	13,744	1,330,546
52084200	Coloured plain cotton weave, with >=85% cotton, >100g/m2	MADAGASCAR	2	49,620	16,607,820
52084300	Coloured 3 or 4-thread twill (incl. cross twill), with >=85% cotton	MADAGASCAR	2	90	39,812
52084900	Coloured woven cotton fabrics, with >=85% cotton, nes	MADAGASCAR	2	119,777	41,481,981
52085100	Printed plain cotton weave, with >=85% cotton, =<100g/m2	MADAGASCAR	2	27,379	2,953,773
52085200	Printed plain cotton weave, with >=85% cotton, >100g/m2	MADAGASCAR	2	45,311	4,764,917
52085900	Printed woven cotton fabrics, with >=85% cotton, nes	MADAGASCAR	2	20,769	2,706,519
52091900	Unbleached cotton fabrics, with >=85% cotton, >=200g/m2, nes	MADAGASCAR	2	395,209	29,676,138
52092900	Bleached woven cotton fabrics, with >=85% cotton, >=200g/m2, nes	MADAGASCAR	2	26,122	987,848
52093900	Dyed woven cotton fabrics, with >=85% cotton, >=200g/m2, nes	MADAGASCAR	2	670	88,875
52094200	Denim, with >=85% cotton, >=200g/m2	MADAGASCAR	2	1,009,864	78,845,790
52095900	Printed woven cotton fabrics, with >=85% cotton, >200g/m2	MADAGASCAR	2	10,855	1,652,719
52101900	Unbleached woven cotton fabrics, nes, with <85% cotton, =<200g/m2	MADAGASCAR	2	12,116	1,311,836
52102100	Bleached plain cotton weave, with <85% cotton, =<200g/m2	MADAGASCAR	2	463	400,662
52102900	Bleached woven cotton fabrics, nes, with <85% cotton, =<200g/m2	MADAGASCAR	2	119,723	30,550,633
52103100	Dyed plain cotton weave, with <85% cotton, =<200g/m2	MADAGASCAR	2	2,110	465,526
52103900	Dyed woven cotton fabrics, nes, with <85% cotton, =<200g/m2	MADAGASCAR	2	4,410	2,814,592
52104900	Coloured woven cotton fabrics, nes, with <85% cotton, =<200g/m2	MADAGASCAR	2	655	286,520
52114200	Coloured denim, with <85% cotton, >200g/m2	MADAGASCAR	2	24,500	540,000
52114300	Coloured fabrics of 3 or 4-thread twill, with <85% cotton, >200g/m2	MADAGASCAR	2	3,979	1,435,199
52114900	Coloured woven cotton fabrics, nes, with <85% cotton, >200g/m2	MADAGASCAR	2	8,310	652,418
52115900	Printed woven cotton fabrics, nes, with <85% cotton, >200g/m2	MADAGASCAR	2	27,711	1,436,158
52121100	Unbleached woven fabrics of cotton, =<200g/m2, nes	MADAGASCAR	2	3,000	2,468,930
52121200	Bleached woven fabrics of cotton, =<200g/m2, nes	MADAGASCAR	2	27,125	5,494,068
52121300	Dyed woven fabrics of cotton, =<200g/m2, nes	MADAGASCAR	2	66,761	26,316,284
52121400	Coloured woven fabrics of cotton, =<200g/m2, nes	MADAGASCAR	2	5,410	2,284,353
52122200	Bleached woven fabrics of cotton, >200g/m2, nes	MADAGASCAR	2	36,678	7,742,510
52122300	Dyed woven fabrics of cotton, >200g/m2, nes	MADAGASCAR	2	79,465	7,186,210
52122400	Coloured woven fabrics of cotton, >200g/m2, nes	MADAGASCAR	2	17,006	2,096,409
52122500	Printed woven fabrics of cotton, >200g/m2, nes	MADAGASCAR	2	125,301	15,235,438

52121300	Dyed woven fabrics of cotton, =<200g/m2, nes	MALAWI	2	270	51,602
52091900	Unbleached cotton fabrics, with >=85% cotton, >=200g/m2, nes	MOZAMBIQUE	2	24,000	2,679,891
52081900	Unbleached woven cotton fabrics, nes, with >=85% cotton	SEYCHELLES	2	380	109,055
52082900	Bleached woven cotton fabrics, nes, with >=85% cotton	SEYCHELLES	2	269	135,207
52083200	Dyed plain cotton weave, with >=85% cotton, >100g/m2	SEYCHELLES	2	21	3,850
52084900	Coloured woven cotton fabrics, with >=85% cotton, nes	SEYCHELLES	2	1,005	117,957
52085200	Printed plain cotton weave, with >=85% cotton, >100g/m2	SEYCHELLES	2	346	30,000
52085900	Printed woven cotton fabrics, with >=85% cotton, nes	SEYCHELLES	2	717	101,818
52091900	Unbleached cotton fabrics, with >=85% cotton, >=200g/m2, nes	SEYCHELLES	2	28	2,500
52092900	Bleached woven cotton fabrics, with >=85% cotton, >=200g/m2, nes	SEYCHELLES	2	610	41,568
52094200	Denim, with >=85% cotton, >=200g/m2	SEYCHELLES	2	57	2,450
52094900	Coloured woven cotton fabrics, with >=85% cotton, >200g/m2	SEYCHELLES	2	150	5,000
52095900	Printed woven cotton fabrics, with >=85% cotton, >200g/m2	SEYCHELLES	2	325	27,000
52101900	Unbleached woven cotton fabrics, nes, with <85% cotton, =<200g/m2	SEYCHELLES	2	16	2,500
52102900	Bleached woven cotton fabrics, nes, with <85% cotton, =<200g/m2	SEYCHELLES	2	236	46,104
52104900	Coloured woven cotton fabrics, nes, with <85% cotton, =<200g/m2	SEYCHELLES	2	949	253,844
52113900	Dyed woven cotton fabrics, nes, with <85% cotton, >200g/m2	SEYCHELLES	2	46	18,750
52115100	Printed plain cotton weave, with <85% cotton, >200g/m2	SEYCHELLES	2	218	20,555
52115900	Printed woven cotton fabrics, nes, with <85% cotton, >200g/m2	SEYCHELLES	2	405	100,000
52121200	Bleached woven fabrics of cotton, =<200g/m2, nes	SEYCHELLES	2	170	6,000
52121300	Dyed woven fabrics of cotton, =<200g/m2, nes	SEYCHELLES	2	3,898	491,482
52121400	Coloured woven fabrics of cotton, =<200g/m2, nes	SEYCHELLES	2	150	10,000
52122200	Bleached woven fabrics of cotton, >200g/m2, nes	SEYCHELLES	2	550	62,500
52122300	Dyed woven fabrics of cotton, >200g/m2, nes	SEYCHELLES	2	660	75,000
52122500	Printed woven fabrics of cotton, >200g/m2, nes	SEYCHELLES	2	613	151,550
52081900	Unbleached woven cotton fabrics, nes, with >=85% cotton	SOUTH AFRICA	2	43	20,368
52084200	Coloured plain cotton weave, with >=85% cotton, >100g/m2	SOUTH AFRICA	2	203	30,000
52084900	Coloured woven cotton fabrics, with >=85% cotton, nes	SOUTH AFRICA	2	488	28,590
52091100	Unbleached plain cotton weave, with >=85% cotton, >=200g/m2	SOUTH AFRICA	2	11,998	535,031
52091900	Unbleached cotton fabrics, with >=85% cotton, >=200g/m2, nes	SOUTH AFRICA	2	183,608	8,765,432
52094200	Denim, with >=85% cotton, >=200g/m2	SOUTH AFRICA	2	744,290	54,330,382

52095900	Printed woven cotton fabrics, with >=85% cotton, >200g/m2	SOUTH AFRICA	2	9	1,973
52102900	Bleached woven cotton fabrics, nes, with <85% cotton, =<200g/m2	SOUTH AFRICA	2	3,790	956,631
52114200	Coloured denim, with <85% cotton, >200g/m2	SOUTH AFRICA	2	2,200	47,870
52121300	Dyed woven fabrics of cotton, =<200g/m2, nes	SOUTH AFRICA	2	18,162	9,759,093
52122200	Bleached woven fabrics of cotton, >200g/m2, nes	SOUTH AFRICA	2	475	223,415
52122400	Coloured woven fabrics of cotton, >200g/m2, nes	SOUTH AFRICA	2	220	23,187
52122500	Printed woven fabrics of cotton, >200g/m2, nes	SOUTH AFRICA	2	294	34,794
52082900	Bleached woven cotton fabrics, nes, with >=85% cotton	ZIMBABWE	2	4,359	374,242
52083900	Dyed woven cotton fabrics, with >=85% cotton, nes	ZIMBABWE	2	73,355	7,902,936
52084900	Coloured woven cotton fabrics, with >=85% cotton, nes	ZIMBABWE	2	461	115,598
52085200	Printed plain cotton weave, with >=85% cotton, >100g/m2	ZIMBABWE	2	1,435	474,192
52091900	Unbleached cotton fabrics, with >=85% cotton, >=200g/m2, nes	ZIMBABWE	2	99,782	15,686,957
52094200	Denim, with >=85% cotton, >=200g/m2	ZIMBABWE	2	228,590	21,851,328
52095900	Printed woven cotton fabrics, with >=85% cotton, >200g/m2	ZIMBABWE	2	1,294	396,543
52101900	Unbleached woven cotton fabrics, nes, with <85% cotton, =<200g/m2	ZIMBABWE	2	119	21,501
52121300	Dyed woven fabrics of cotton, =<200g/m2, nes	ZIMBABWE	2	1,460	514,836
Total Fabrics				**4,668,605**	**507,172,501**

Annex 10 : Total Imports of Cotton, Yarn and Textile products in ESA Countries by HS Codes in 2003

HS CODE	DESCRIPTION	COUNTRY OF DESTINATION	UNIT	QUANTITY	CIF (RS)
COTTON					
52010000	Cotton, not carded or combed.	MADAGASCAR	2	1,187,962	46,263,962
52010000	Cotton, not carded or combed.	MOZAMBIQUE	2	368,769	15,175,363
52010000	Cotton, not carded or combed.	UGANDA	2	101,262	3,947,477
52010000	Cotton, not carded or combed.	ZAMBIA	2	38,461	1,431,045
52030000	Cotton, carded or combed.	SOUTH AFRICA	2	165,786	11,117,390
TOTAL COTTON				**1,862,240**	**77,935,237**
YARN					
52054200	Combed cabled cotton yarn, with >=85% cotton, nprs, >14mn but <=43mn	EGYPT	2	28	7,445
52054400	Combed cabled cotton yarn, with >=85% cotton, nprs, >52mn but <=80mn	KENYA	2	7,979	492,597
52054600	Multiple or cabled yarn measuring more than 106.38 decitex	KINGDOM OF SWAZILAND	2	11,000	2,150,950
52051100	Uncombed single cotton yarn, with >=85% cotton, nprs, <=14mn	MADAGASCAR	2	58,912	5,738,821
52051500	Uncombed single cotton yarn, with >=85% cotton, nprs, >80mn	MADAGASCAR	2	104	47,987
52054600	Multiple or cabled yarn measuring more than 106.38 decitex	MADAGASCAR	2	386,958	52,189,368
52061200	Uncombed single cotton yarn, with <85% cotton, nprs, >14mn but <=43mn	MADAGASCAR	2	254,920	28,594,854
52041100	Cotton sewing thread, with >=85% cotton, not put up for retail sale	SOUTH AFRICA	2	13,086	2,075,809
52051100	Uncombed single cotton yarn, with >=85% cotton, nprs, <=14mn	SOUTH AFRICA	2	1,991,186	142,755,060
52052100	Combed single cotton yarn, with >=85% cotton, nprs, <=14mn	SOUTH AFRICA	2	282,537	28,936,683
52052200	Combed single cotton yarn, with >=85% cotton, nprs, >14mn but <=43mn	SOUTH AFRICA	2	781,953	55,445,852
52052400	Comb single cotton yarn, with >=85% cotton, nprs, >52mn but <=80mn	SOUTH AFRICA	2	8,037	344,635

52054200	Combed cabled cotton yarn, with >=85% cotton, nprs, >14mn but <=43mn	SOUTH AFRICA	2	112	3,779
52054400	Combed cabled cotton yarn, with >=85% cotton, nprs, >52mn but <=80mn	SOUTH AFRICA	2	375,612	29,948,850
52054600	Multiple or cabled yarn measuring more than 106.38 decitex	SOUTH AFRICA	2	13,442	1,137,271
52054800	Multiple or cabled yarn measuring less than 83.33 decitex of combed fibres	SOUTH AFRICA	2	56	34,731
52061300	Uncombed single cotton yarn, with <85% cotton, nprs, >43mn but <=52mn	SOUTH AFRICA	2	5,283	534,319
52062200	Combed single cotton yarn, with <85% cotton, nprs, >14mn but <=43mn	SOUTH AFRICA	2	26,952	2,264,533
52062500	Combed single cotton yarn, with <85% cotton, nprs, >80mn	SOUTH AFRICA	2	26	5,153
52071000	Cotton yarn (excl. sewing), put up for retail sale, with >=85% cotton	SOUTH AFRICA	2	2,170	482,218
52052100	Combed single cotton yarn, with >=85% cotton, nprs, <=14mn	TANZANIA	2	16,155	1,063,426
52052200	Combed single cotton yarn, with >=85% cotton, nprs, >14mn but <=43mn	TANZANIA	2	14,736	1,003,839
52054400	Combed cabled cotton yarn, with >=85% cotton, nprs, >52mn but <=80mn	TANZANIA	2	80	2,391
52054600	Multiple or cabled yarn measuring more than 106.38 decitex	UGANDA	2	2,152	274,484
52051100	Uncombed single cotton yarn, with >=85% cotton, nprs, <=14mn	ZAMBIA	2	49,632	2,232,560
52051200	Uncombed single cotton yarn, with >=85% cotton, nprs, >14mn but <=43mn	ZAMBIA	2	8,774	504,644
52052100	Combed single cotton yarn, with >=85% cotton, nprs, <=14mn	ZAMBIA	2	32,732	2,430,422
52052200	Combed single cotton yarn, with >=85% cotton, nprs, >14mn but <=43mn	ZAMBIA	2	843,879	57,385,096
52052300	Combed single cotton yarn, with >=85% cotton, nprs, >43mn but <=52mn	ZAMBIA	2	219,133	17,368,898
52052400	Comb single cotton yarn, with >=85% cotton, nprs, >52mn but <=80mn	ZAMBIA	2	93,849	8,210,043
52053100	Uncombed cabled cotton yarn, with >=85% cotton, nprs, <=14mn	ZAMBIA	2	14,309	864,153
52053200	Uncombed cabled cotton yarn, with >=85% cotton, nprs, >14mn but <=43mn	ZAMBIA	2	169,410	10,757,952
52054200	Combed cabled cotton yarn, with >=85% cotton, nprs, >14mn but <=43mn	ZAMBIA	2	142,316	11,104,122
52054300	Combed cabled cotton yarn, with >=85% cotton, nprs, >43mn but	ZAMBIA	2	15,916	1,819,379

	<=52mn				
52054400	Combed cabled cotton yarn, with >=85% cotton, nprs, >52mn but <=80mn	ZAMBIA	2	8,559	623,645
52079000	Cotton yarn (excl. sewing), put up for retail sale, with <85% cotton	ZAMBIA	2	568,070	42,414,197
52079000	Cotton yarn (excl. sewing), put up for retail sale, with <85% cotton	ZIMBABWE	2	70	2,006
TOTAL Yarn				6,420,125	511,252,172
FABRICS					
52082200	Bleached plain cotton weave, with >=85% cotton, >100g/m2	EGYPT	2	3,800	1,018,217
52082900	Bleached woven cotton fabrics, nes, with >=85% cotton	EGYPT	2	1,547	475,925
52082900	Bleached woven cotton fabrics, nes, with >=85% cotton	KENYA	2	26,622	2,593,181
52085900	Printed woven cotton fabrics, with >=85% cotton, nes	KENYA	2	5	3,135
52122500	Printed woven fabrics of cotton, >200g/m2, nes	KENYA	2	40	2,700
52081100	Unbleached plain cotton weave, with >=85% cotton, =<100g/m2	MADAGASCAR	2	6,655	1,933,761
52081900	Unbleached woven cotton fabrics, nes, with >=85% cotton	MADAGASCAR	2	3,266	995,283
52082100	Bleached plain cotton weave, with >=85% cotton, =<100g/m2	MADAGASCAR	2	49	8,495
52082200	Bleached plain cotton weave, with >=85% cotton, >100g/m2	MADAGASCAR	2	636	162,498
52082900	Bleached woven cotton fabrics, nes, with >=85% cotton	MADAGASCAR	2	6,401	1,501,947
52083100	Dyed plain cotton weave, with >=85% cotton, =<100g/m2	MADAGASCAR	2	2,450	581,624
52083900	Dyed woven cotton fabrics, with >=85% cotton, nes	MADAGASCAR	2	2,619	1,397,675
52084200	Coloured plain cotton weave, with >=85% cotton, >100g/m2	MADAGASCAR	2	47	54,557
52084900	Coloured woven cotton fabrics, with >=85% cotton, nes	MADAGASCAR	2	17,750	3,927,915
52085100	Printed plain cotton weave, with >=85% cotton, =<100g/m2	MADAGASCAR	2	99	20,092
52085900	Printed woven cotton fabrics, with >=85% cotton, nes	MADAGASCAR	2	13,235	2,925,137
52091100	Unbleached plain cotton weave, with >=85% cotton, >=200g/m2	MADAGASCAR	2	3,980	471,483

52091900	Unbleached cotton fabrics, with >=85% cotton, >=200g/m2, nes	MADAGASCAR	2	6,935	1,035,547
52092200	Bleached 3 or 4-thread twill, >=85% cotton, >=200g/m2	MADAGASCAR	2	7,029	1,446,946
52092900	Bleached woven cotton fabrics, with >=85% cotton, >=200g/m2, nes	MADAGASCAR	2	313	188,258
52093200	Dyed 3 or 4-thread twill (incl. cross twill), with >=85% cotton	MADAGASCAR	2	5,087	1,316,008
52093900	Dyed woven cotton fabrics, with >=85% cotton, >=200g/m2, nes	MADAGASCAR	2	6,381	948,569
52094200	Denim, with >=85% cotton, >=200g/m2	MADAGASCAR	2	21,923	2,371,859
52095100	Printed plain cotton weave, with >=85% cotton, >200g/m2	MADAGASCAR	2	340	136,648
52095900	Printed woven cotton fabrics, with >=85% cotton, >200g/m2	MADAGASCAR	2	24	4,195
52104900	Coloured woven cotton fabrics, nes, with <85% cotton, =<200g/m2	MADAGASCAR	2	1,879	864,406
52111100	Unbleached plain cotton weave, with <85% cotton, >200g/m2	MADAGASCAR	2	45,548	5,698,843
52115100	Printed plain cotton weave, with <85% cotton, >200g/m2	MADAGASCAR	2	678	343,980
52121300	Dyed woven fabrics of cotton, =<200g/m2, nes	MADAGASCAR	2	10,798	1,376,376
52122400	Coloured woven fabrics of cotton, >200g/m2, nes	MADAGASCAR	2	1,646	377,785
52081900	Unbleached woven cotton fabrics, nes, with >=85% cotton	SOUTH AFRICA	2	99,811	13,424,868
52082900	Bleached woven cotton fabrics, nes, with >=85% cotton	SOUTH AFRICA	2	2,622	323,787
52083900	Dyed woven cotton fabrics, with >=85% cotton, nes	SOUTH AFRICA	2	1,728	299,462
52084200	Coloured plain cotton weave, with >=85% cotton, >100g/m2	SOUTH AFRICA	2	62	23,458
52084900	Coloured woven cotton fabrics, with >=85% cotton, nes	SOUTH AFRICA	2	69	17,037
52085100	Printed plain cotton weave, with >=85% cotton, =<100g/m2	SOUTH AFRICA	2	150	27,083
52085200	Printed plain cotton weave, with >=85% cotton, >100g/m2	SOUTH AFRICA	2	2,250	421,903
52085900	Printed woven cotton fabrics, with >=85% cotton, nes	SOUTH AFRICA	2	24,418	2,082,639
52091900	Unbleached cotton fabrics, with >=85% cotton, >=200g/m2, nes	SOUTH AFRICA	2	705,324	83,909,933
52092900	Bleached woven cotton fabrics, with >=85% cotton, >=200g/m2, nes	SOUTH AFRICA	2	12,470	1,134,007

52093900	Dyed woven cotton fabrics, with >=85% cotton, >=200g/m2, nes	SOUTH AFRICA	2	185	143,150
52094100	Coloured plain cotton weave, with >=85% cotton, >=200g/m2	SOUTH AFRICA	2	356	218,083
52094200	Denim, with >=85% cotton, >=200g/m2	SOUTH AFRICA	2	1,158,589	130,862,304
52094300	Coloured 3 or 4-thread twill, with >=85% cotton, >=200g/m2	SOUTH AFRICA	2	81	46,886
52094900	Coloured woven cotton fabrics, with >=85% cotton, >200g/m2	SOUTH AFRICA	2	48	18,357
52095100	Printed plain cotton weave, with >=85% cotton, >200g/m2	SOUTH AFRICA	2	3,494	1,767,056
52095900	Printed woven cotton fabrics, with >=85% cotton, >200g/m2	SOUTH AFRICA	2	10,094	3,443,805
52104900	Coloured woven cotton fabrics, nes, with <85% cotton, =<200g/m2	SOUTH AFRICA	2	2,290	225,372
52105100	Printed plain cotton weave, with <85% cotton, =<200g/m2	SOUTH AFRICA	2	1,205	178,810
52114200	Coloured denim, with <85% cotton, >200g/m2	SOUTH AFRICA	2	596	371,701
52114300	Coloured fabrics of 3 or 4-thread twill, with <85% cotton, >200g/m2	SOUTH AFRICA	2	50	31,917
52115900	Printed woven cotton fabrics, nes, with <85% cotton, >200g/m2	SOUTH AFRICA	2	412	144,579
52121300	Dyed woven fabrics of cotton, =<200g/m2, nes	SOUTH AFRICA	2	84,172	13,066,610
52121400	Coloured woven fabrics of cotton, =<200g/m2, nes	SOUTH AFRICA	2	22	9,016
52121500	Printed woven fabrics of cotton, =<200g/m2, nes	SOUTH AFRICA	2	98	69,786
52122400	Coloured woven fabrics of cotton, >200g/m2, nes	SOUTH AFRICA	2	6	2,894
52122500	Printed woven fabrics of cotton, >200g/m2, nes	SOUTH AFRICA	2	5,708	2,446,442
52095200	Printed 3 or 4-thread twill, with >=85% cotton, >200g/m2	ZIMBABWE	2	222	114,833
52122500	Printed woven fabrics of cotton, >200g/m2, nes	ZIMBABWE	2	721	124,783
Total Fabrics				**2,315,035**	**289,133,606**