

# Jammu & Kashmir Export Scenario

Pashmina as focused Product & China as focused Country



## Global Trade Insights & J&K Exports Spotlight

- Top Importers of pashmina
- China: Road to Elegance  
Pashmina's Leading Destination
- Pashmina: History, Production
- SWOT Analysis of Pashmina

## Pashmina: A Symphony of Luxury & Craftsmanship

- What is so special about Pashmina?
- Products made from Pashmina in Kashmir.

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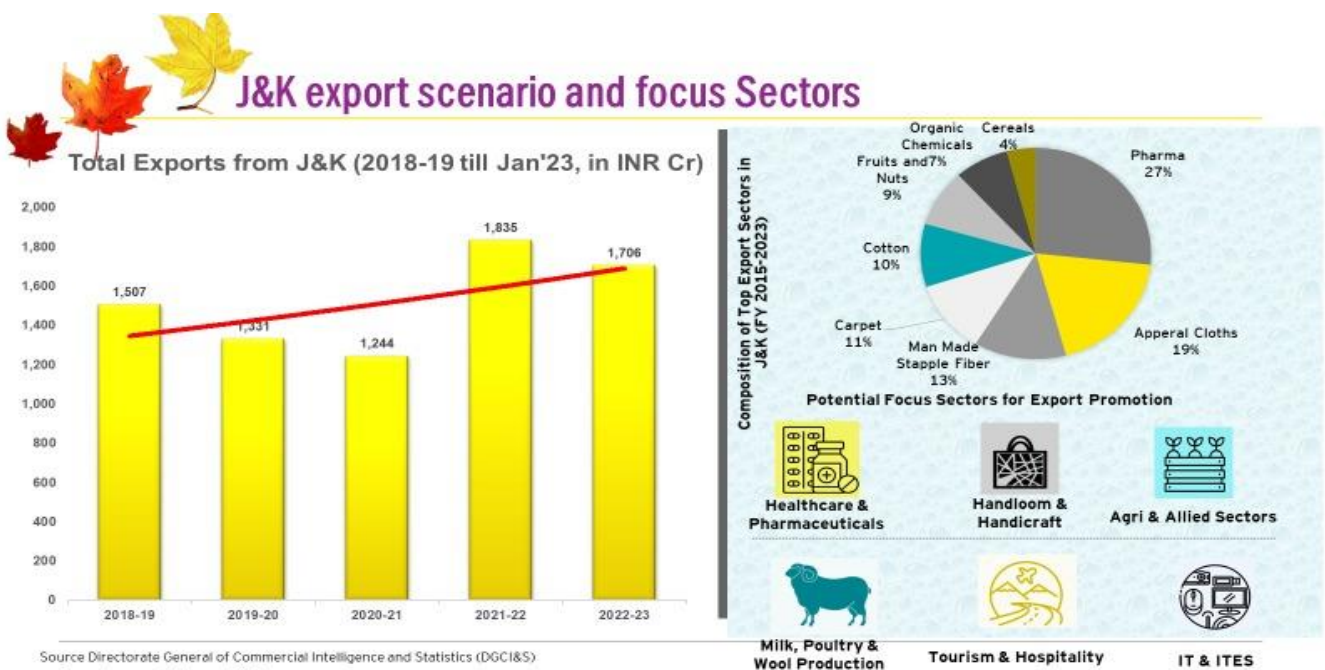
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# Global Trade Insights & J&K Exports Spotlight

" Elevate Your Style, Embrace Heritage: Kashmiri Pashmina, Where Luxury Meets Tradition!"



This month’s issue focuses on Pashmina export from Jammu & Kashmir keeping in mind the highest demand of import from China.



In 2021-22, J&K exported goods worth US\$246 Mn. Of the total exports, Pharma sector contributed 50% of the total exports followed by cotton yarn (24% of total exports) and Man-Made Yarn (10% of total exports)

Greetings from the picturesque landscapes of Jammu & Kashmir, where enchanting orchards and lush greenery paint a canvas of natural beauty! It is with immense joy that we share exciting news from the heart of this captivating region. In our latest venture, we are thrilled to unveil a treasure revered globally—the world-renowned J&Ks Pashmina—to the discerning consumers of China.

### **Pashmina: Unravelling the Rich Heritage and Craftsmanship of Kashmiri Elegance**

Pashmina, often hailed as 'soft gold,' finds its origin in the Changthang plateau of Ladakh, nestled high in the Himalayas. Sourced from the undercoat of the Himalayan Mountain goat, scientifically known as *Capra hircus*, Pashmina wool develops in response to the harsh winters, providing the goats with insulation and protection.

Hand-processed with care, the soft and fine wool is meticulously gathered and skilfully woven by master artisans to craft luxurious shawls and scarves. Renowned for its distinct warmth and lightweight nature, Pashmina stands as a coveted choice for those seeking both comfort and elegance."

Pashm, originating from Persian, signifies wool, yet in the context of Kashmir, it denotes the unspun wool of Changthangi goats. In contemporary language, 'pashmina' can refer to both the raw material and the distinctive Kashmir shawl crafted from it.

### **History**

Wool fibres discovered in ancient Harappa artifacts date back to the Indus Valley Civilization, resembling Pashmina and Shahtoosh. Pashmina gained prominence through its use in Kashmir shawls, becoming a symbol of rank in Mughal times. Babur, founder of the Mughal Empire, initiated the tradition of gifting khalat, including Pashmina garments, as a mark of honour. Akbar, Babur's grandson, continued this practice after conquering Kashmir in 1568. Pashmina shawls were integral to khil'at ceremonies during Akbar's reign.

From the 16th to the early 20th centuries, Iranian emperors also adorned themselves with Pashmina, exchanging Kashmir shawls within political and religious practices. In India, Pakistan, and Nepal, Pashmina blankets were prized additions to wealthy women's dowries. Despite being worn by men, Kashmiri shawls in 19th-century English writing became synonymous with women's luxuries, serving as heirlooms and symbols of marital status. In France, the Pashmina Kashmir shawl became a fashion icon through Empress Joséphine de Beauharnais, adding warmth and visual interest to French gowns.

### **Production**

Pashmina wool, prized for its softness and warmth, comes from goats that naturally shed their winter coat every spring, yielding approximately 80–170 grams of fiber per goat. Unlike other fine wools, Pashmina is collected through combing, not shearing, during the moulting season. The Changpa people of Ladakh, Himalayas, particularly in the Changthang plateau, rear Pashmina goats in the extreme conditions of Tibet, where temperatures can drop to  $-40^{\circ}\text{C}$ .

The Changpa, a nomadic community, not only rear sheep for meat but also Pashmina goats for their wool. The raw Pashmina is then exported to Kashmir, where the entire production process, from combing to spinning, weaving, and finishing, is meticulously carried out by hand by skilled craftsmen. The primary hub for Pashmina fabric production is the historic district of Srinagar. The creation of a single traditional Pashmina stole (70x200cm) demands about 180 hours of manual labour, reflecting the intricate craftsmanship involved in producing this luxurious textile.



Explore the fascinating world of Pashmina, where each thread tells a story. Learn about the meticulous process of hand-combing, cleaning, and weaving that goes into creating these luxurious masterpieces. From the remote plateaus of Tibet to the skilled hands of our craftsmen in Jammu and Kashmir, witness the journey of Pashmina from fleece to fashion.

## **What is so special about Pashmina shawl?**



**Feel:** Pashmina offers a luxurious and silky feel against the skin. The exceptional softness is attributed to the fine diameter of the wool fibres, measuring as small as 12-15.5 microns. This fine texture enhances the overall comfort and tactile appeal of Pashmina, making it a sought-after and premium textile.

**Warmth:** Pashmina wool, known for its exceptional warmth, is an ideal choice for colder temperatures. Despite being lightweight, Pashmina shawls offer substantial warmth without compromising on bulk, providing a comfortable and stylish solution for chilly weather.

**Durability:** Pashmina wool exhibits remarkable durability, showcasing strength in its tightly woven fibres. This inherent strength makes Pashmina resistant to common issues like pilling and wear and tear, ensuring longevity and sustained quality over time.

**Versatility:** Pashmina shawls boast remarkable versatility, offering multiple styling options. They can be worn conventionally draped over the shoulders as a shawl or elegantly wrapped around the neck as a scarf, showcasing adaptability for various fashion preferences and occasions.

**Handmade:** Pashmina shawls are typically handmade by skilled artisans, employing traditional techniques passed down through generations. The craftsmanship involved in their creation ensures that each shawl is a unique work of art, reflecting the heritage and individuality of the artisan's expertise.

**Designs:** Pashmina shawls feature a diverse range of intricate designs and patterns, each distinct from the other. These unique designs are often crafted through a blend of weaving and embroidery techniques, showcasing the artistry and creativity that characterize Pashmina textiles.

**Lightweight:** Pashmina shawls, known for their warmth, remain remarkably lightweight. This characteristic makes them perfect for layering and wearing in diverse settings, offering both comfort and style without adding unnecessary bulk.

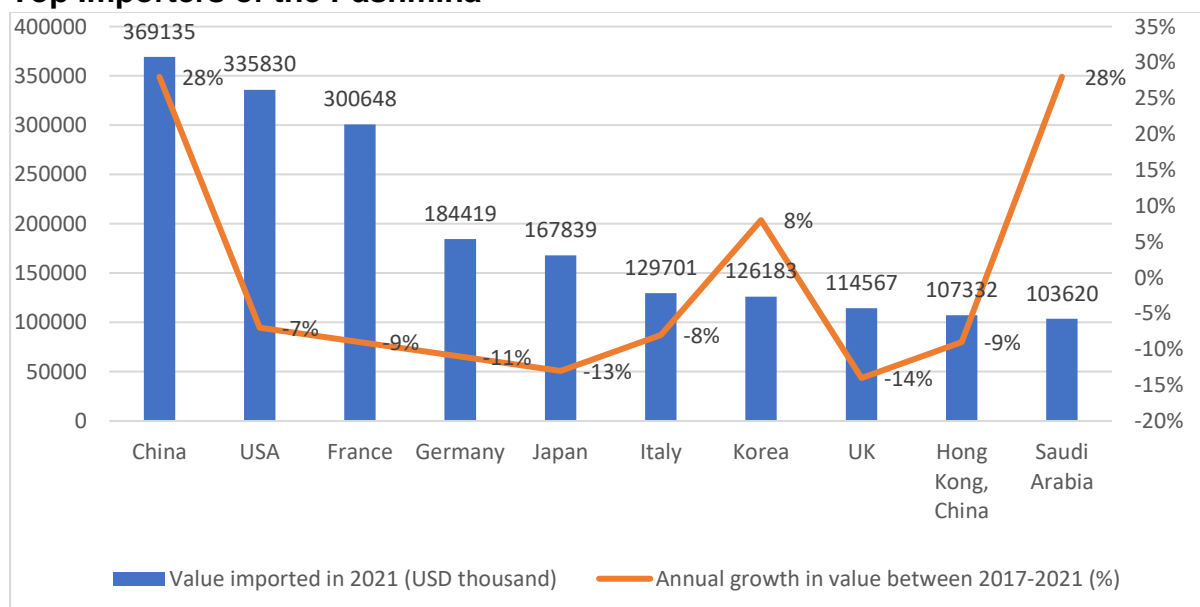
**Timeless:** Pashmina shawls are timeless and enduring, never falling out of style. Frequently passed down from generation to generation, they become cherished family heirlooms, symbolizing both the enduring quality of the fabric and the sentimental value they hold over time.

**Sustainable:** Pashmina shawl production is sustainable, offering vital support to local communities by providing a stable income source. Additionally, it plays a crucial role in preserving traditional weaving and embroidery techniques, contributing to the cultural heritage of the regions where Pashmina is crafted.

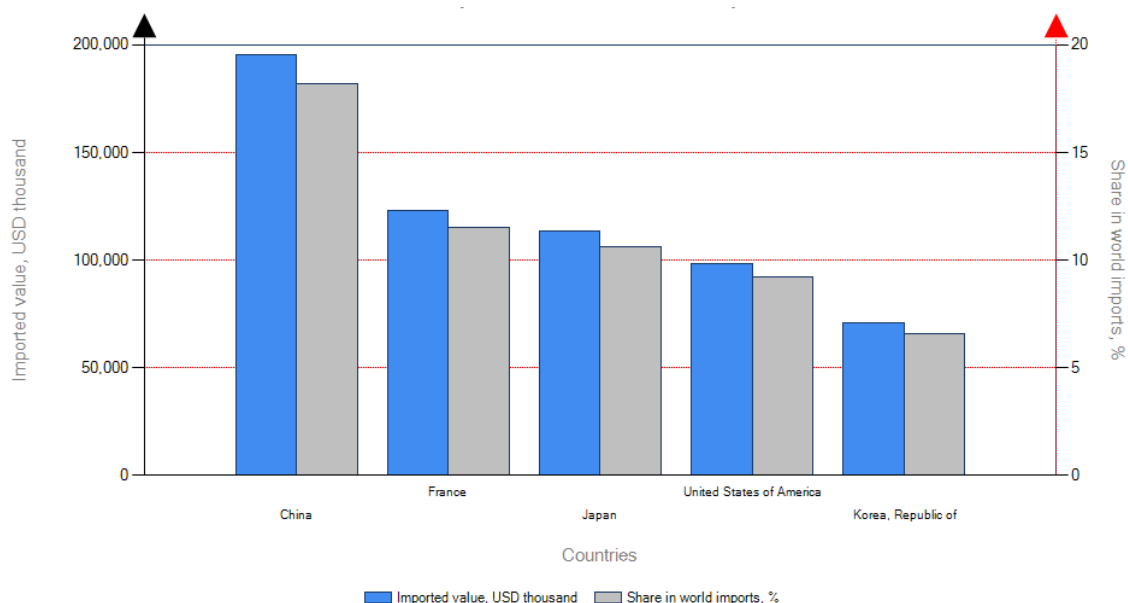
**Uniqueness:** Pashmina shawls stand out as truly unique, distinguished by features that set them apart from other types of wool. Considered the ultimate luxury accessory, they boast remarkable softness, warmth, durability, and versatility. More than just an accessory, Pashmina shawls are considered works of art, embodying craftsmanship and individuality.

## Import & Export Scenario of pashmina.

### Top Importers of the Pashmina



## Top Five Pashmina Product Imports (USD Thousand) with share in world imports



### China: Silk Road to Elegance, Pashmina's Leading Destination.

China is the top Pashmina importing country in the world followed by the USA, France, Germany, & Japan" reflects the global trade dynamics for Pashmina products. Let's delve into the details:

#### 1. China:

**Import Volume:** China's position as the top Pashmina importing country signifies its substantial demand for this luxurious textile.

**Market Influence:** China's growing economy, burgeoning middle class, and a keen appreciation for high-quality goods contribute to its prominence in Pashmina imports.

#### 2. United States:

**Consumer Demand:** The USA follows as a significant importer of Pashmina, reflecting the demand among American consumers for this elegant and soft wool.

**Luxury Market:** Pashmina's association with luxury aligns with the preferences of consumers in the United States, known for their interest in premium and fashionable products.

#### 3. France:

**Fashion Hub:** France's strong presence as a Pashmina importer is likely linked to its global reputation as a fashion and luxury goods hub.

**Cultural Affinity:** French consumers often appreciate high-quality and unique textiles, making Pashmina a desirable addition to their wardrobes.

#### 4. Germany:



**Quality Consciousness:** Germany's position in Pashmina imports may be influenced by the country's reputation for valuing quality and craftsmanship in consumer goods.

**Market Stability:** The stability of the German economy and the purchasing power of its population contribute to the demand for premium products like Pashmina.

## 5. Japan:

**Sophisticated Consumer Base:** Japan's presence in the list highlights the sophistication of its consumer base and their interest in refined, globally sourced products.

**Fashion Trends:** Pashmina, with its timeless appeal, likely aligns with the fashion preferences and trends in the Japanese market.

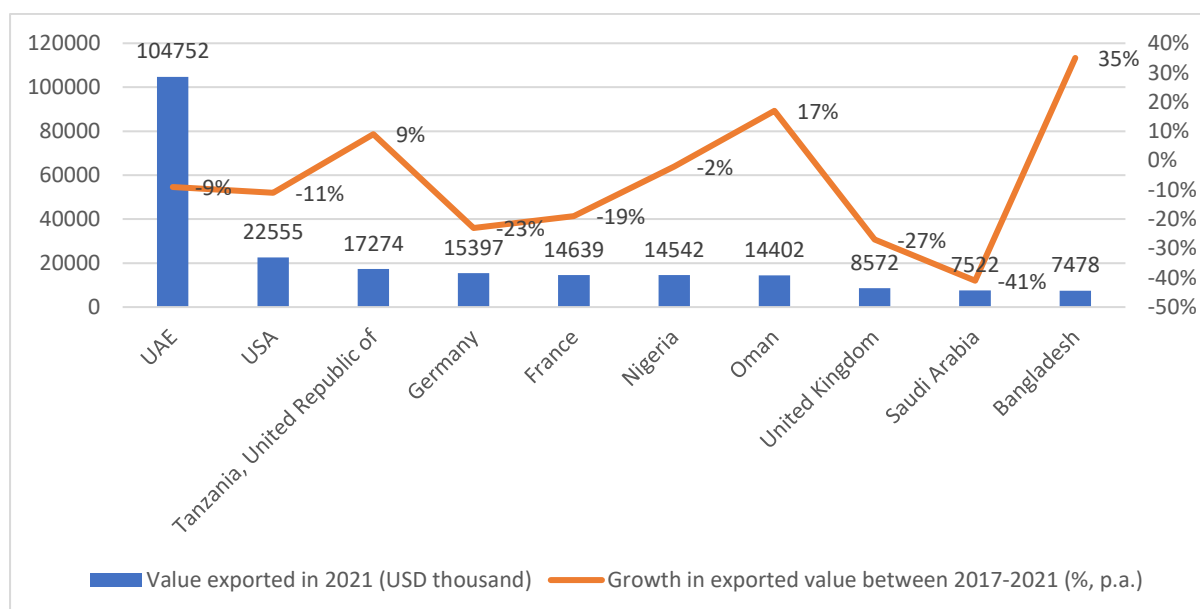
Global Significance:

Trade Flow: The distribution of top importers across different regions signifies the global nature of the Pashmina trade.

Cultural Diversity: Pashmina's popularity across diverse markets underscores its universal appeal, transcending cultural boundaries.

It's important to note that market dynamics can evolve, and the current scenario may differ. For the latest and most accurate information on Pashmina imports, checking recent trade statistics and reports would provide a comprehensive understanding of the current landscape.

## Top Countries to whom India Export the Pashmina



## Synergies:

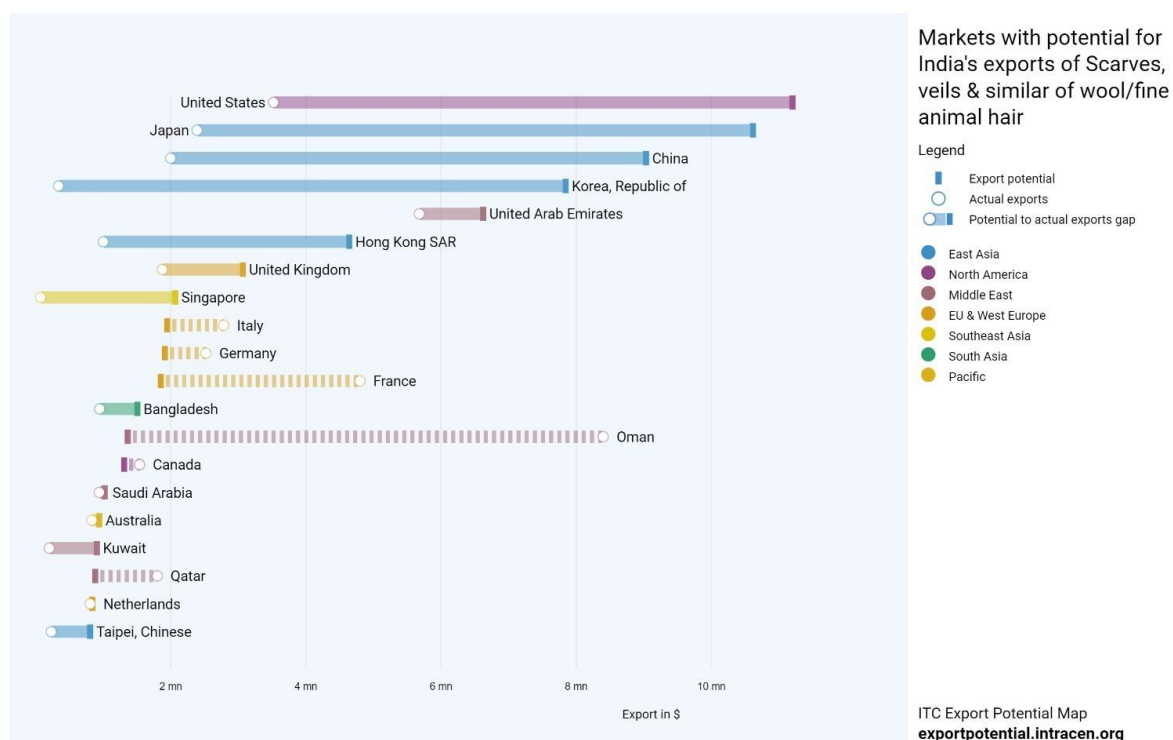
### Korea, Hong Kong, UK & Japan:

- These countries represent immediate opportunities where a well-established marketing channel can swiftly unlock market potential.
- Strategic marketing efforts can lead to rapid market penetration and capitalize on short-term opportunities in these regions.

## Long Term:

### USA, Bangladesh, Kuwait, Russia, Nepal, Australia:

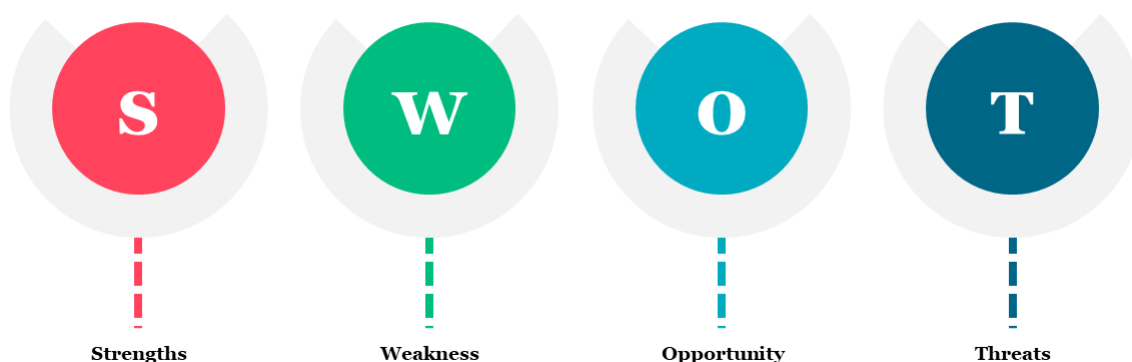
- These countries are identified as long-term priority markets.
- Fulfilling untapped market potential necessitates compliance with high-quality standards by J&K exporters.
- Subsidized freight rates and substantial marketing efforts are essential for market accommodation, requiring a more extended timeframe for effective penetration and sustained success.



*Pashmina Shawls Market is Growing at Compound Annual Growth Rate (CAGR) of 5.80% from 2023 to 2030. The Global Pashmina Shawls market size will grow at a compound annual growth rate (CAGR) of 5.80% from 2023 to 2030.*



## SWOT Analysis of Pashmina



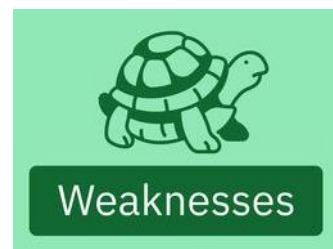
### Strengths:

- **Incomparable Quality:** Kashmiri Pashmina is renowned globally for its exceptional quality, characterized by fine fibres, unmatched softness, and excellent warmth. This inherent quality gives it a competitive edge in the luxury textile market.
- **Traditional Craftsmanship:** The handcrafted nature of Kashmiri Pashmina, involving skilled artisans and intricate weaving techniques, adds immense value. This traditional to the uniqueness and product. craftsmanship contributes cultural significance of the
- **Cultural Heritage:** The Pashmina is deeply heritage of Jammu and connection not only adds but also provides a marketing. production of Kashmiri rooted in the cultural Kashmir. This historical to the allure of the product compelling narrative for
- **Versatility in Products:** The adaptability of Kashmiri Pashmina in various products, including shawls, scarves, clothing, blankets, and accessories, makes it a versatile material that caters to diverse consumer preferences and fashion trends.



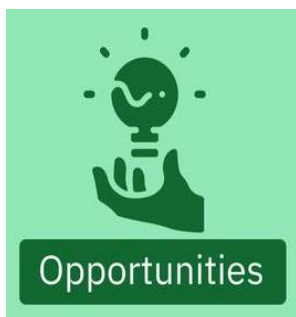
### Weaknesses:

- **Limited Awareness:** Despite its global appeal, there is a lack of awareness about Kashmiri Pashmina and its unique qualities. Efforts to market and promote the product need to be intensified to reach a broader audience.
- **Production Constraints:** The traditional handcrafting process is time-consuming, and there may be limitations in meeting the growing demand. Modernizing production techniques while preserving craftsmanship is a delicate balance.



### Opportunities:

- **Expanding Export Markets:** The global demand for high-quality textiles presents an opportunity for Kashmiri Pashmina to expand its export markets beyond its traditional customer base. Targeting emerging economies with a growing middle class interested in luxury goods can be advantageous.



- **Diversification of Product Range:** Exploring new product lines or collaborations with fashion designers to create contemporary designs can attract a wider customer base. This includes exploring opportunities in the home decor and fashion accessory markets.
- **E-commerce and Digital Marketing:** Utilizing e-commerce platforms and digital marketing can enhance the visibility of Kashmiri Pashmina. Online sales channels can open new avenues for reaching international

consumers directly.

### Threats:

- **Competition from Imitations:** The market faces a threat from counterfeit products and imitations. Strict measures and authentication to maintain the integrity of
- **Global Economic Trends:** fluctuations in consumer especially in luxury markets, for high-end products like
- **Trade Barriers:** Geopolitical barriers between countries can import of goods, impacting the international trade of Kashmiri Pashmina.



quality control processes are crucial Kashmiri Pashmina. Economic downturns or spending patterns, can impact the demand Kashmiri Pashmina. tensions and trade affect the export and

## Products Made from Pashmina in Kashmir: A Symphony of Luxury and Craftsmanship:



Kashmir, renowned for its Pashmina, produces a range of exquisite products that showcase the artistry and finesse of local artisans. Here's a detailed exploration of the diverse offerings:

### **Pashmina Shawls:**

The crown jewel of Kashmiri Pashmina, these shawls are meticulously handwoven and adorned with intricate embroidery. They range from the classic Jamawar and Sozni styles to contemporary designs, making them a symbol of elegance.

### **Scarves and Wraps:**

Lightweight and versatile, Pashmina scarves and wraps provide a touch of sophistication. They come in various patterns and color palettes, catering to both traditional and modern tastes.

### **Pashmina Sarees:**

Fusion of tradition and opulence, Pashmina sarees are woven with delicate threads, often featuring ornate borders and pallus. They add a regal touch to special occasions.

### **Pashmina Stoles:**

Perfect for everyday luxury, Pashmina stoles are prized for their softness and warmth. They come in a myriad of designs, from minimalistic to intricately embroidered patterns.

### **Pashmina Blankets and Throws:**

Crafted with the finest Pashmina wool, these blankets and throws provide unparalleled warmth and comfort. They often showcase traditional Kashmiri motifs, adding a touch of heritage to home decor.

### **Pashmina Apparel:**

Pashmina extends beyond accessories to clothing items like dresses, tunics, and jackets. These garments blend traditional craftsmanship with contemporary fashion, offering a unique and stylish wardrobe.

### **Pashmina Carpets and Rugs:**

Artistry extends to home decor with Pashmina carpets and rugs. Intricately woven patterns and vibrant colours create luxurious additions to interiors.

### **Pashmina Accessories:**

Beyond clothing, Pashmina is crafted into various accessories such as gloves, hats, and socks. These items marry functionality with the unmatched softness of Pashmina.

### **Pashmina Upholstery:**

In recent times, Pashmina is finding its way into upholstery, adding a touch of luxury to furniture and home furnishings.

**Custom and Limited Editions:**

Artisans often create custom pieces or limited editions, showcasing their creativity and responding to evolving trends in the fashion and textile industry.

Kashmiri Pashmina products are not merely possessions; they are embodiments of a rich cultural legacy, each piece narrating a story of craftsmanship, heritage, and the timeless allure of the Kashmir Valley.

**Syed Mujtaba Safvi**

**EY**

