Economic Analysis of the Modern Textiles & Clothing Market within the Process of Final Completion of the ACT/WTO Agreement

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Abstract
The aim of the paper is to present main tendencies in global and European textile and clothing trade and competitive position of different regions and products especially Far East of Asia countries in the context of the liberalization process within the WTO. Dynamic development of constructions, generating needs for functional, comfortable and decorative designs, decorative clothes, textile wallpapers, carpets and textile floor coverings connected with equipment of interiors of companies, houses and flats (decorative textiles examined in the paper). Increasing importance of the quality of action of the specialized rescue service, which is connected with the increase of dangers resulting from higher freedom of movement of people and liberalization of labor market at an international scale – this results in increase of demand for highly specialized technical textiles also detailed examined in the paper.

Key words: *European Union, globalization, foreign trade, decorative textiles, technical textiles.*

Introduction

At the summit in Lisbon in March 2000 the European Council confirmed that the strategic objective of Europe for the forthcoming decade is to become the most competitive and dynamic knowledge-based economy, capable of sustained economic growth accompanied by an improved number and quality of jobs and better social conditions. For enterprises in Europe this translates into necessary endeavours targeted to enhanced competitiveness, which is interpreted as an enterprise's ability to steadily stimulate development, to increase productivity and to enlarge markets by strong competition.

As regards macro economics„ competitiveness is identified with a steady upward trend measured by GDP growth, productivity of resources and factors of production growing in macro terms and economic expansion on the international market (enlargement of existing and entering into new markets), that is with the capability of offering new, better and cheaper services in a competitive environment. M. E. Porter equated competitiveness with productivity and stressed the importance of identifying their determinants. The primary factor cited as a determinant of competitiveness in macro as well as micro terms is human resources.

According to the OECD definition, competitiveness denotes the ability of firms, industries, regions, nations or transnational groups to confront international competition and to secure the sustainability of a relatively high rate of return on the factors of production employed and of relatively high level of employment. In the long term improved competitiveness yields growth in the total productivity. Higher productivity is particularly important for more successful competitiveness on markets open to international competition.

Improved competitiveness is synonymous with higher productivity. Enterprises are competitive when their labour productivity and all production factors grow consistently, which allows them to reduce the unit costs of their output, etc., but also affects other enterprises at a national and international level. Higher productivity provides funding for organisations' expansion plans. In the short term citizens benefit from better and cheaper products available on the market and in the medium term from growing employment. Another effect is a constant growth in wages in real terms. As a result a country's standard of living goes up when its productivity (in macro terms) growth is sustained. Therefore, an enterprise plays an primary role in generating revenues as well as employment and contributes to a lasting and balanced economic and social development.

Growth in productivity depends on a number of factors, among which innovations and investments in the ICT sector and the development of human capital belong to the most important. Economic development and growth in productivity result from an educated workforce. Human capital, especially in technological sectors, makes productivity grow due to the accumulation and dissemination of knowledge. Knowledge and the skill of its efficient application are the key to the competitiveness of economies. It is practical to develop and pursue activities that aim at providing people in Europe with sufficient knowledge, appropriate strategies and workable methods of accelerating teaching available to everyone [1].

Consequently, higher productivity determines both the improved competitiveness of economies as a whole as well as their balanced social and economic development [2].

In setting out its renewed Action Programme for Growth and Employment, the Commission declared its commitment to focusing the renewed Lisbon Strategy on growth and employment. To do this, the EU's priorities were declared to be:
- Making Europe a more attractive place to invest and work
- Putting knowledge and innovation at the heart of European growth
- Shaping policies to allow businesses to create more and better jobs.

This Communication on industrial policy was announced under the Community Lisbon Programme of July 2005 and represents an important contribution to the achievement of these objectives. The health of the manufacturing industry is essential for Europe's ability to grow. Whilst it is currently undergoing important changes and facing major challenges, it needs a favourable business environment to continue to develop and prosper. The main role of industrial policy is to provide the right framework conditions for enterprise development and innovation in order to make the EU an attractive place for industrial investment and job creation [3].

Liberalisation process in the T&C sector - Protective measures and limitations on trade admissible under the WTO Agreement

International trade in textiles and clothing has played an important role in the development process of many countries and in their integration into the world economy today, the textile and clothing sector accounts for a major part of merchandise exports of a large number of low- and middle-income countries. Developing countries as a group accounted for more than one-half of world exports of textiles and clothing in 2004. In no other category of manufactured goods do developing countries enjoy such a large net-exporting position. Exports of textiles and clothing continued to exceed agricultural exports in many developing countries and in the aggregate throughout the 2000 - 04 period. However, textiles and clothing is not a very dynamic product group, as its share of the merchandise exports of developing countries has been declining rather steadily since 2000 - the share was less than 10 per cent in 2004. Further liberalisation of trade in textiles is of major interest to many developing countries as it improves market access in an area where many of them have a comparative advantage. However, some exporters of developing countries who have benefited from preferential market access are concerned about increased competition resulting from further liberalisation. The quota restrictions that went with the ATC were on imports from Canada, the European Union and the Unites States. These three markets account for more than one-half of world textile and clothing imports. The removal of quotas could therefore be expected to have a significant impact on global trade flow, even though the end of the ATC quota regime did not represent the complete elimination of protection in these markets – relatively high tariff averages continue to be applied in the sector. Nevertheless, the end of a special trade regime that had existed for more than 40 years for textiles and clothing marked an important step forward, both in terms of trade liberalisation and the elimination of negotiated trade arrangements clearly in breach of key WTO rules. At the beginning of 2005, China introduced an export tax on a number of textile products; the tax was increased in May and partly abolished in June after the United States and the EU sought new restrictions on the export of textiles and clothing from China, their most important single supplier. The legal basis for these new restrictions was paragraph 242 of a report by the working party concerning the accession of China to the WTO. The new quotas apply until the end of 2007 for the EU and until the end of 2008 for the United States. Imports from all other (WTO) suppliers remained free of quantitative restrictions in the EU and US markets. Certain other countries also applied restrictions on Chinese textiles in 2005, using the special safeguard negotiated as part of China's terms of accession to the WTO. These actions have no doubt slowed down the expansion of Chinese exports. In what follows, we shall examine what changes have occurred in the level and geographical composition of trade in textiles and clothing during 2005. We shall also briefly review what has happened to prices, production and employment in the EU and the United States in the post-ATC period [4].

__Table 1.__ Liberalisation process under the ACT/WTO Agreement; Source: Agreement on Textiles and Clothing, www.wto.org.

Step	Percentage of products to be brought under GATT during the period	Percentage of products to be brought under GATT per year
Step 1: 1 Jan 1995 (to 31 Dec 1997)	16% (minimum, taking 1990 imports as basis)	6.96% per year
Step 2: 1 Jan 1998 (to 31 Dec 2001)	17%	8.7% per year
Step 3: 1 Jan 2002 (to 31 Dec 2004)	18%	11.05% per year
Step 4: 1 Jan 2005	49% (maximum)	No quotas left

Starting from the year 2005, all products chosen from each of the following categories: tops and yarns, fabrics, made-up textile products, and clothing, would be integrated into the GATT 1994. All Multifibre Agreement (MFA) restrictions in place on 31 December 1994 had been carried over into the new agreement: Agreement on Textiles and Clothing (ATC) and maintained until such time as the restrictions are removed or the products integrated into GATT. For products remaining under restraint, at whatever stage, the agreement lays down a formula for increasing the existing growth rates.

The integration process was carried out progressively in four stages (***Table 1***), over a ten-year transition period (3 years, 4 years, 3 years). On 1 January 1995 Members were required to integrate products from the list in the Annex to the Agreement, which represented no less than 16 per cent of the total volume of their imports of all those products in 1990. At stage 2, on 1 January 1998, no less than a further 17 per cent was integrated; at stage 3, on 1 January 2002. no less than a further 18 per cent was integrated. Finally, on 1 January 2005, all remaining products (which could amount to 49 per cent as a maximum) will automatically become integrated, and the ATC will terminate.

All the members of the WTO also obliged themselves to undertake actions necessary to meet the rules and regulations of GATT 1994 so as to:
- improve access to textile and clothing markets by means of such measures as e.g. the reduction and tying of tariff rates, the reduction or elimination of non-tariff restrictions and the simplification of customs as well as administrative and licensing formalities,
- ensure the application of trade policy measures connected with honest and just conditions of trade in textiles and clothing in such areas as provenance rules and antidumping procedures, subsidies and compensatory funds as well as the protection of intellectual property,
- avoid discrimination of imports in the textile and apparel sector while taking measures dictated by the rules of general trade policy.

The Agreement provides an appropriate procedure for the notification integration actions. The MFA participants applying no quantitative restrictions on 31 December 1994 (Poland was among them) and wishing to obtain the right of a temporary protection clause had to notify the Textiles Monitoring Body (TMB) of their actions in the framework of the integration program no later than 60 days after the WTO-instituting Agreement came into force.

Recent trends (2000 - 2005) in EU industrial policy related to the T&C sector

The European Union's industrial policy will continue to follow a horizontal approach. Its instruments aim to provide framework conditions in which entrepreneurs and businesses can take initiatives, exploit their ideas and build on their opportunities. In December 2002 the European Commission published a communication on " Industrial policy in an Enlarged Europe" [5], which recalled how equally important the three pillars of sustainable strategy are. In addition, two dimensions were particularly highlighted: firstly, that all EU policies need to contribute to competitiveness, and it is important to optimise the synergies between EC policies and industrial competitiveness; secondly, while providing the best horizontal framework conditions for enterprises, horizontal policy has to take into account the specific needs of industrial sectors [5].

In October 2003 it adopted the Communication "The future of the textiles and clothing sector in the enlarged European Union"[6]. How best to give the EU textiles and clothing industry chances to compete in the face of new and unprecedented challenges is the subject of this Communication. These challenges are mainly related to developments in its international environment: in particular the elimination of import quotas on 1st January 2005 as well as the challenges and opportunities of a new round of multilateral negotiations; the evolution of competitiveness factors increasingly associated with innovation, research, skills, quality and creativity; the preparation for EU enlargement both in the present Member States and in the Acceding Countries; and a permanent process of restructuring and modernisation [7].

New requirements concerning the market access are connected with the environmental impact of textile production. This impact starts with the use of pesticides

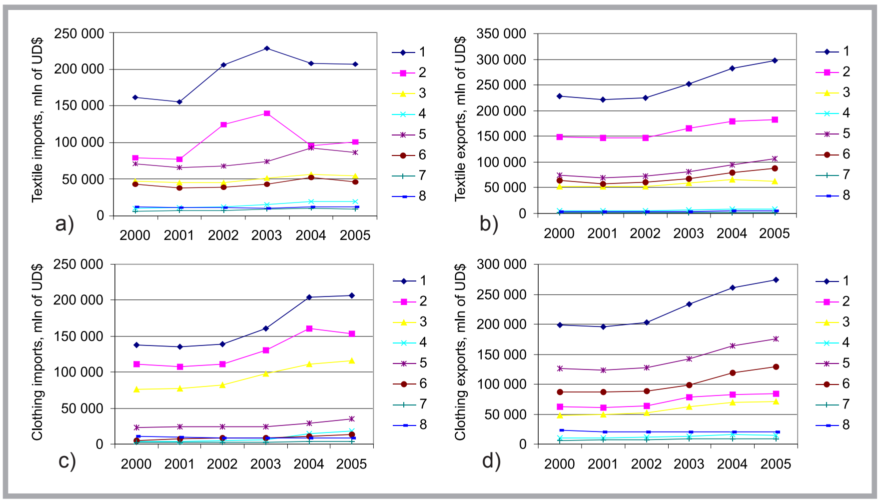

Figure 1. Detailed trends in global T&C trade. DPD – Developed, DPING – Developing; a) textile imports, b) textile exports, c) clothing imports, d) clothing exports; Own calculations based on COMTRADE, EUROSTAT and WTO; 1 - World, 2 - DPD Market Economies, 3 - EU-15, 4 - Central-Eastern, 5 - DPING Market Economies, 6 - DPING Far East, 7 - DPING Africa, 8 - DPING America.

during the cultivation of plants from which natural fibres are obtained, the erosion caused by sheep farming, and the emissions during the production of synthetic fibres. In particular eco-labels are used to distinguish a product in a positive, "greener" way from its competitors. They are relatively important in the textile and clothing sector, and their role is very positive in the creation of cleaner production [8]. The above-mentioned Communication by the Commission " The future of the textiles and clothing sector in the enlarged European Union" of October 2003 also addresses several aspects of labeling for the textiles and clothing sector [9].

In April 2004, on the eve of EU enlargement, the Commission issued a follow-up Communication: "Fostering structural change: An industrial policy for the enlarged Europe"[10]. This Communication calls for action in three areas: a better regulatory environment for business, better mobilization of all EU policy to boost competitiveness, and further work with individual sectors to develop policy responses which match specific needs, help them to move up the value chain, and anticipate and accompany structural transformations [11].

In the European Union, trade in textiles is regulated by four directives, which are the most important:

- The Directive of the Council 73/44/EEC (26 February 1973) on the approximation of the laws of Member States relating to the quantitative analysis of ternary fiber mixtures, which describes the rules for taking samples, identifies the methods of quantitative analysis of ternary fiber mixtures and presents examples of calculating the percentage content of certain ternary mixtures;
- Directive 96/73/EC of the European Parliament and of the Council of 16 December 1996 on certain methods for the quantitative analysis of binary textile fiber mixtures;
- Directive 96/74/EC of the European Parliament and of the Council of 16 December 1996 on textile names, which defines the concept of a textile product, describes the permissible level of tolerance for products classified as pure (100%), describes ways of marking and labeling textile products and introduces changes to Directive 73/44/EEC, concerning the introduction of new (connected with technological development) methods of researching two and three ingredient textile products. The Directive includes enclosures containing:
  - Table of the textile fibers with names and description,
  - Agreed allowances used to calculate the mass of fibers contained in a textile product,
  - List of products that cannot be made subject to mandatory labeling or marking,
  - List of products for which only inclusive labeling or marking is obligatory,
  - Repealed Directives and time limits for transposition,
  - Correlation table of the articles.

- Commission Directive 97/37/EC of 19 June 1997 adapting to technical progress Annexes I and II to Directive 96/74/EC of the European Parliament and of the Council on textile names (introducing 3 new fibers to that Directive).

Competitive position of different regions and product groups in the T&C sector

Trends in the global as well as European textile and clothing trade in the years 2000 - 2005

In the years 2000 - 2005 the global textile and clothing trade saw a constant increase in both exports and imports. Imports of textiles increased in the previously mentioned period from 161.6 to 207.1 billion dollars, while imports of clothing increased from 137.2 to about 206 billion dollars [1]. As far as export is concerned, in textiles there was an increase from 228.8 to 297.4 billion dollars, while in clothing (where many countries also report the refining of processing) there was an increase of more than 75 billion dollars, from 198.1 to 273.8 billion dollars . Detailed trends in global T&C trade are shown in ***Figure 1*** (see page 9).

Developed market economies took the leading position regarding imports of textiles (about 50% of global imports) and clothing (about 75 - 80% of global imports) , but in the period under consideration their share, mainly of global imports of clothing, decreased by more than 5%, from 81.2% in the year 2000 to 746% in the year 2005, mainly due to Middle and Eastern Europe, particularly in respect of previous CEFTA and CIS countries.

With regard to exports of T&C products, developed market economies were the leaders on the global market, with a share of about 61 - 65%in the case of textiles and a share of about 30 - 33% with respect to clothing [1]. With a share of about 23% for textiles and about 25% for clothing, the EU-15 countries retained the leading position.

Among the developing market economies, whose share of global imports of textiles and clothing was at a level of about 26 - 31% in the period under consideration (imports of textiles was at a level of 33 - 45%, and imports of clothing at a level of 14 - 17%), dominant were the Far East countries. Their share of the global import of textiles was at a level of 19 to 26%, and in the import of clothing it was at a level of 3.5 to 6.4% (one should notice that there was a constantly increasing trend in the whole period under consideration).

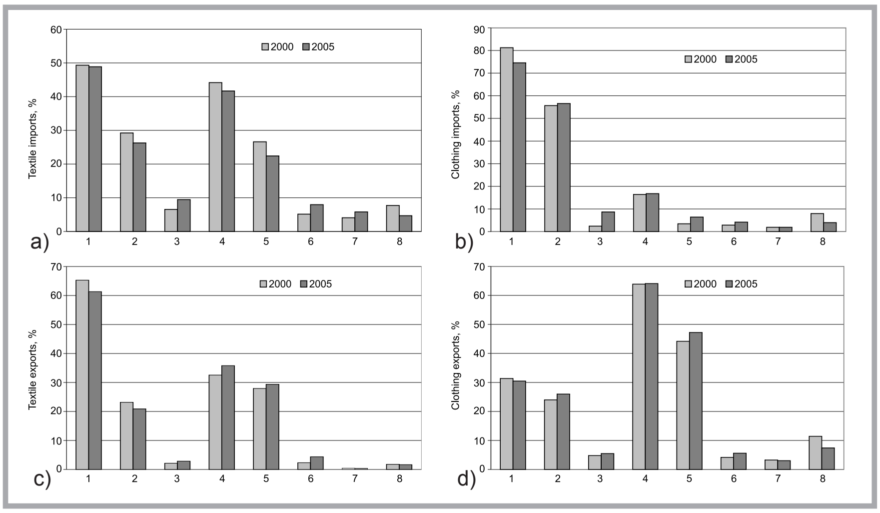

Figure 2. *Geographical structure of imports and exports of textiles and clothing in 2000 and 2005; a) imports of textiles, b) imports of clothing, c) exports of textiles, d) exports of clothing; Source: Based on own calculations according to Eurostat and Comtrade statistical databases; 1 - DPD Market Economies, 2 - EU-15, 3 - Central-Eastern Europe & FM USSR, 4 - DPING Market Economies, 5 - DPING Far East, 6 - DPING Middle East, 7 - DPING Africa, 8 - DPING America.*

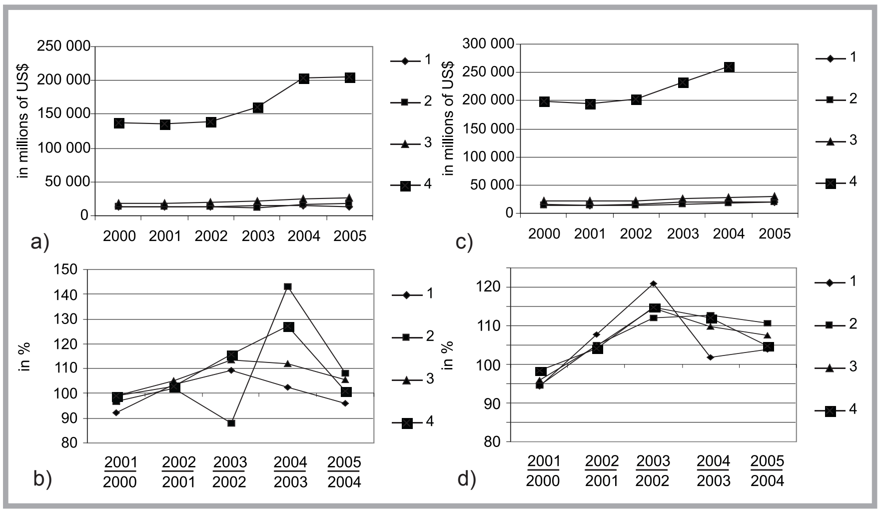

Figure 3. *World and European Union 15- imports and exports of selected commodities of T&C; a) imports in millions of US$, b)) imports in %, c) exports in millions of US$, d) exports in %; Source: Based on own calculations according to Eurostat and Comtrade statistical databases.; 1 - Knitted or croached fabrics, 2 - Decorative fabrics, 3 - Technical fabrics, 4 - Clothing.*

In the export of textiles and clothing, the developing market economies were most prominent, whose share ofthe global market in the period under consideration was at a level of 31 - 36% for textiles and 61 - 64% for clothing; dominant were the Far East countries. Their position in the global export of textiles and clothing was characterised in the years 2000 - 2005 by a tendency to increases and reached the level of 29.3% in the case of textiles, and 47.2% in the case of clothing in the year 2005, respectively [2]) – see ***Figures 2*** and ***3.***

Trends in the European Union trade of selected product groups in the textile and clothing market with special reference to decorative fabrics and technical fabrics as more innovative segments of the T&C market

In the current study an in-depth analysis of the decorative fabric and technical fabric market is performed, as the developing market segments (characterised by the high dynamics of changes in international trade) were, in the period under consideration (2000 - 2005), more than 30% dependent on suppliers from third countries, mainly from South-East Asian countries and newly joined EU Member States. From the ratio analysis in the years 2002 - 2005, it can be concluded that there were positive dynamics of imports to the European market of such product groups as: decorative and technical fabrics. In the period under consideration, especially world imports of decorative fabrics increased significantly (from 133 to almost 18 billion dollars) as well as world imports of technical fabrics (from 18.8 to 26.3 billion dollars) [3]. The import of these product groups to the EU also increased significantly, from 1.9 to 2.3 billion dollars (in the case of decorative fabrics) and from 1.6 to 2.2 billion dollars in the case of technical fabrics. The main suppliers from the Far East were China, India and next Hong Kong, Bangladesh, Pakistan, South Korea and Taiwan (but with a decreasing trend regarding their competitive position). Turkey and countries from Middle and Eastern Europe belonging to CEFTA (Central European Free Trade Agreement) also had an important position among suppliers of the products under consideration to the European market.. Most of these countries joined the EU in 2004. However, at the end of the period under consideration, former CEFTA countries, except Bulgaria and Romania, achieved an increasing share of imports of technical and decorative fabrics in comparison to the year 2000.

In the period under consideration, the European Union countries were also exporters of decorative and technical fabrics to the markets of third countries, mainly to Middle and Eastern Europe, particularly to Poland, Hungary and the Czech Republic. The share of former CEFTA countries in external EU exports was at a level of about 4% for decorative fabrics and at a level of 5 - 6% for technical fabrics. The main recipients of the product groups analysed in the markets outside Europe were the USA, China, India (especially with respect to decorative fabrics), Turkey and Taiwan. The dynamics of sales of these products from the EU to the markets of third countries was positive, and the highest increase in exports in comparison with the previous year was achieved in 2003 [4].

EU-15 countries as importers and exporters of decorative and technical fabrics [5].

Imports

In the period under consideration the main importers of the product groups analysed to the EU were Germany (with a share of about 30 - 25% of the EU's external import, which is decreasing), Great Britain (with a share of about 20%), France (with a share of about 13%), Italy (with a share of about 10 - 13%, an increasing trend), Holland (with a share of about 7%), Belgium (with a share of about 5.5 - 5.8% , a slightly increasing trend), Spain (with a share of about 4 - 7% , an increasing trend), Sweden (with a share of about 2%) and Austria (with a share of about 2%).

Analysing the position of countries with respect to the import of selected product groups, one should notice the especially high position of Germany, Great Britain and Italy in the import of decorative fabrics, and Germany, Great Britain, Italy, France and Belgium in the import of the technical fabrics.

The dynamics of imports of the products analysed to the markets of the EU-15 countries was characterised by positive indices in the years 2002 - 2005. Defailed tendences in import of technical and decorative fabrics are presented in ***Figures 4 - 8.***

Exports

The main exporters among the EU-15 countries of the product groups under consideration to the markets of third countries in the years 2001 - 2005 were Italy, Germany, France, Great Britain, Spain and Belgium. Germany takes the leading position among the EU countries mainly in the export of technical fabrics, and a high position in the export of decorative fabrics. Belgium is the leader in the export of decorative fabrics, Italy is prominent in the export of decorative fabrics, France in technical fabrics, while Holland exports large quatities of decorative fabrics. In the period under consideration, the dynamics of exports of the product groups analysed in the EU-15 countries were characterised by positive indices, reaching the highest level in the year 2003, in comparison with to 2002. The least favorable with regards to dynamics was the last year under consideration, especially for exporters from Germany, Sweden, Finland and Ireland. Detailed tendences in exports of technical and decorative fabrics are presented in ***Figures 9 - 13***. (see page 12).

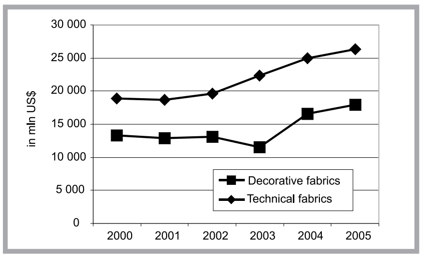

Figure 4. *World and EU-15 2000-2005 - Imports of Selected Commodities. World import of decorative fabrics and technical fabrics (2000-2005)*

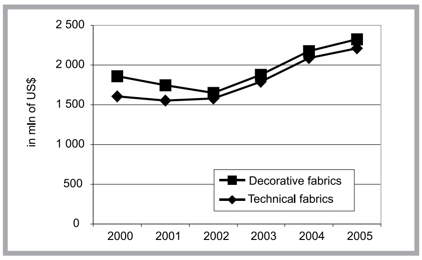

Figure 5. *Import of the EU of Decorative Fabrics and technical Fabrics from the "third countries" (2000-2005).*

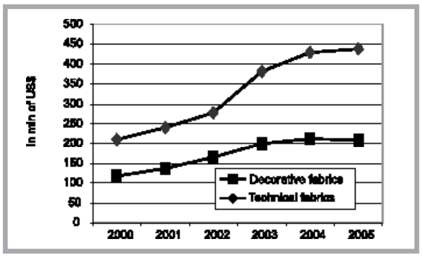

Figure 6. *Import of Technical Fabrics and Decorative Fabrics to the European Union from CEFTA.*

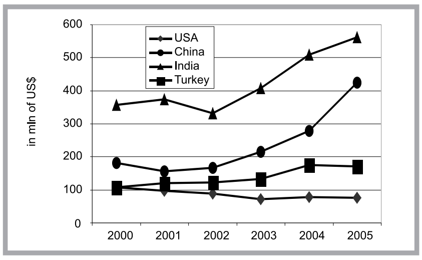

Figure 7. *Import of Decorative Fabrics to the European Union from selected Countries: USA, China, India and Turkey.*

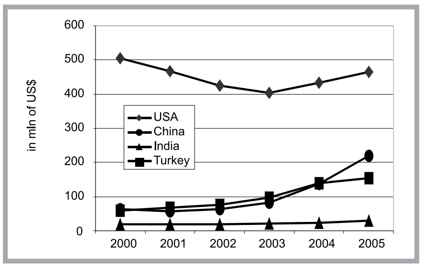

Figure 8. *Import of Technical Fabrics to the European Union from selected countries: USA, China, India and Turkey.*

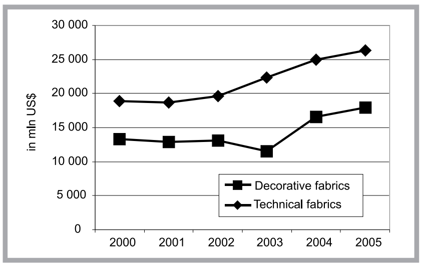

Figure 9. *World exports of decorative fabrics and technical fabrics in 2000-2005*

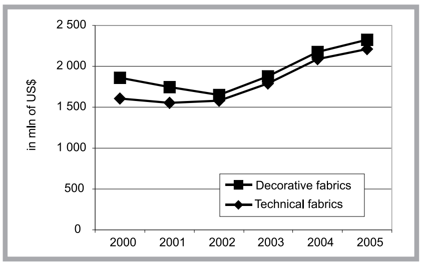

Figure 10. *Exports of Decorative Fabrics and Technical Fabrics from the European Union to the third countries".*

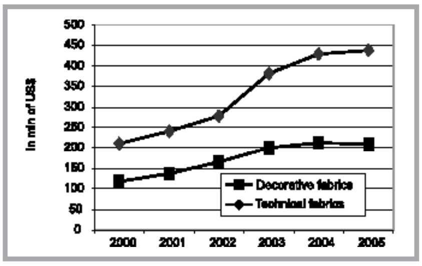

Figure 11. *Exports of Decorative Fabrics and Technical Fabrics from the European Union to CEFTA.*

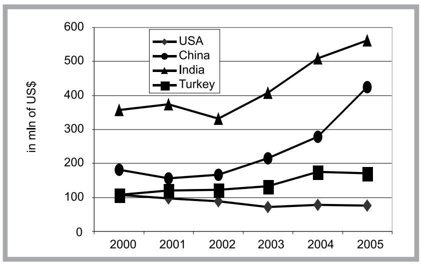

Figure 12. *Exports of Technical Fabrics from the European Union to selected countries: USA, China, India and Turkey.*

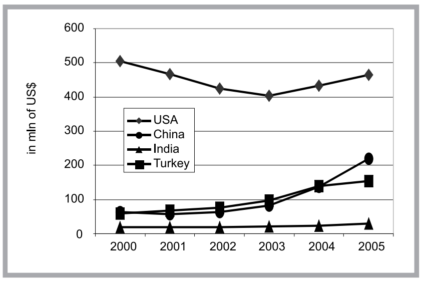

Figure 13. *Exports of Decorative Fabrics form the European Ynion to selected countries: USA, China, India and Turkey.*

Conclusions

- Within the globalisation of economies it is observed fast spread of ideas, inventions, innovations in the age of the electronic commerce and internationalization process of enterprises,
- Dynamic trends in the diversification of incomes of different societies inside countries and between countries and its impact on increasing consumer demands , with respect to, among other things, the content of natural ingredients in clothes, requirements concerning the lightness and delicacy of clothes, and at thesame time fulfilling requirements connected with proper warmth protection of the body, and/or permeability, and protection against high pressure (for example sports clothing and/or clothing connected with different leisure activities – fishing, hunting, diving, etc)
- Dynamic development of the construction market, generating a need for functional, comfortable and decorative designs, decorative clothes, textile wallpapers, carpets and textile floor coverings connected with interior equipment of companies, houses and flats (in other words – home textiles)
- Increasing importance of the quality of action of specialised rescue services, which is connected with increasing dangers resulting from the greater freedom of movement of people and the liberalisation of the labour market on an international scale, which results in a greater need for highly specialised protective clothing.
- Paying increasing attention to the prestige of the company and its position on the market, especially in the New Member States of the European Union, and at the same time the need for clothing distinguishing its employees from the employees of its competitors.
- Increase in expenditure on innovations by companies, especially in the area of shortening the life cycle of products and positioning the 'improvement of innovativeness' as the main criterion leading to an increase in the competitiveness of the company, including an increase in expenditure on innovations in the SMEs sector as well as national economies – see 'New Industrial Policy of the EU'[12], etc. Fashion and design industries (e.g. textiles and footwear) are are in the spotlight of the New Industrial Policy of the EU. They make up just 8% of manufacturing value-added, but have experienced low or negative output growth and relatively low R&D spending over recent years. Successful structural adjustment is the key challenge for these industries. Improving innovation, IPR protection, and skills are essential to be able to continue to improve the quality and product-diversity of their output. Obtaining better access to currently heavily protected world markets is also a key policy requirement for these industries.
- Sustainable development requirements and better adaptation to environmental protection rules and standards.

There are still observed similar trends related to the examined in this paper decorative and technical fabrics in the European Internal Market in the period 2006-2008. Both markets belong to leading markets in Europe according to the new initiative of the European Commission [6].

Editorial note

1. According to COMTRADE UN Database.
2. As above; see also Graph 1.
3. According to COMTRADE, UN.
4. According to statistical data based on EUROSTAT and COMTRADE
5. As above, see also Graphs 4-7.
6. LEAD MARKET INITAITIVE FOR EUROPE http://ec.europa.eu/enterprise/leadmarket/leadmarket.htm

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