AND FACTS

OF TEXTILES

**96**

L'Observatoire européen
du textile et de l'habillement

# FIGURES
# AND FACTS
# IN THE WORLD
# OF TEXTILES

# FIGURES AND FACTS IN THE WORLD OF TEXTILES

## BASIC STRUCTURAL DATA ON THE EC

## TEXTILE AND CLOTHING INDUSTRY

### 1988-1992

### Part One

**JULY 1993**

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# INTRODUCTION

The aim of this document is to give a concise presentation of structural data on the textile and clothing industry in the European Community.

Emphasis is placed on the importance and structure of this industry in 1992, as well as on its evolution since 1988.

This first part identifies the different sectors within the clothing and textile industries, either separately or as a whole. The second part, which will be published in the autumn, will cover each sector in more detail (e.g. wool, cotton, knitwear,...).

The OETH would like to thank warmly the many organizations and individuals who have contributed material and comments for this report.

# I. FACTUAL ANALYSIS

## 1. The importance of the textile and clothing industry in the European Community in 1992

The textile and clothing industry remains very important within the Community. In comparison with manufacturing industry, this sector represents some 8.7% of total employment, 4.8% of the value of production and 5.1% of value added.[1]

Employing 2,636 million people, with a turnover of more than 168 billion ECU (1985 prices) and investment of nearly 5.4 billion ECU, this remains without doubt a major industrial sector.

The relative importance of the industry differs considerably depending upon both the sectors within it and the various Member States, as was illustrated in detail by the OETH's recent factual report entitled "The EC Textile and Clothing Industry 1991/1992".

### Employment

More than 90% of employment within the textile and clothing industry is found in six Member States, namely (in decreasing order of importance) Italy (with more than a quarter of the EC's total employment in this industry), Germany, United Kingdom, France, Spain and Portugal. The importance of these Member States is relatively similar in both textiles and clothing, although, in absolute terms, the majority of employment in the industry is in the textile sector, which represents 57% of the entire industry. This total volume of employment emanates from 151,905 enterprises, of which more than 100,000 consist of less than 20 employees (graph 1 and tables 1, 2 and 3).

### Production and turnover

The cumulative turnover of Italy, France and Germany makes up 71.8% of the total turnover of the textile/clothing industry in the Community (70% in textiles, 75.2% in clothing). Furthermore, these countries, along with Belgium, have the highest rates of apparent consumption per inhabitant in the Community (graphs 2 and 3, tables 1,2 and 3).

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[1] Calculated on the basis of enterprises with over 20 employees.

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As to the three Member States who have joined the Community most recently (Spain, Portugal and Greece), their share of the total EC turnover in the industry is 9.7%, while the corresponding figure for employment is 24.3%.

Two-thirds of the turnover of the textile/clothing industry of the Community is generated by the textile industry.

These characteristics are equally valid as concerns production (graph 2) even though the relation between this variable and turnover can vary widely from one Member State to another.

**Value added**

The value added in enterprises with more than 20 employees in the textile/clothing industry represents 35% of production. With an average level of 23,289 ECU per employee, the textile industry considerably surpasses the clothing industry (nearly 18,000 ECU per employee). This difference would be even greater if the knitting industry were not included within the textile industry (tables 1,2 and 3).

It is in Belgium that value added per employee in the textile /clothing industry, which is a reliable indicator of productivity, is the highest, followed closely by Italy, the Netherlands, France and Germany. Conversely, Portugal and Greece show the lowest levels of value added per employee, at 15% and 43% of the Community average respectively (graph 4 and tables).

2.     **Evolution between 1988 and 1992**

**Employment and number of enterprises**

During this period, the industry lost 434,000 jobs in the Community as a whole, of which 153,000 were in 1992 alone (graph 5 and table 1).

In the textile sector the fall in employment at the Community level was 13.6%. Comparing the employment levels in 1992 and 1988, the countries which were the most affected were Greece and the United Kingdom with a 22.5% drop, followed by Portugal and Denmark (21.5%), France (19%) and Spain (14%).

In the clothing industry, again the United Kingdom suffered the worst fall in employment (28.1%) followed by Italy and Spain (17.5% and 16.3% respectively).

The number of enterprises seems on the contrary to have increased by 2.7% overall in the Community (in the textile/clothing industry). However, it is important to take account of the fact that a revision in the statistical coverage of clothing enterprises in Italy in 1989 makes any comparison with the previous year difficult.

Looking at the 1989-92 period, there was a fall in the number of enterprises in the Community by 3,500 because of numerous closures in the last two years. This phenomenon differs according to the sectors and the countries under consideration. The clothing industry has recorded better results (the most recently available data being for 1991), with the number of enterprises staying constant as opposed to a 5.6% fall in textiles (table 4).


## Turnover

The turnover of the EC (at constant prices) and more specifically of the textile/clothing industry is increasing steadily, and has risen 6.8% since 1988. Since 1990, however, the rate of increase has stabilized somewhat with significant variations between the different Member States (graph 6 and tables).

The largest increases were found in the main producing countries, namely Italy (11.7%), Germany (8%), France(15.6%) and Belgium (17.1%). On the other hand, Portugal's turnover decreased by 15%, as did those of the United Kingdom (10.6%) and Denmark.

Italy alone generated 35% of the Community's turnover in 1992, while the share of the overall turnover generated by the three countries with the largest turnovers in the Community (Italy, Germany and France) went up from 68.7% to 71.8% between 1988 and 1992.


## Value added

The value added of the textile/clothing industry stayed relatively stable, even though a slight fall took place in the last two years in both the textile industry (1.8%) and the clothing industry (1.6%).

Taking into account the continued drop in the level of production, the movement in value added is notable. It may well be that this industry has strengthened its competitivity despite the crisis with which it is confronted. The fact that the rate of increase of turnover is higher than that of value added could equally be a confirmation of a change of strategy within the industry.

## Investment

After a steady rise since the beginning of the 80's, investment (at current price levels) in the textile/clothing industry has decreased considerably.

The volume of investment in textiles was, in 1992, at its lowest level since the beginning of the 80's. The amount of investment in the clothing industry is at a significantly lower level than that in the textile industry, but is greater than it was in the 80's even though there has been a decrease in investment in this sector of 10.2% between 1990 and 1992.

In 1992, as compared with 1988, the most significant decreases in investment in the industry were in Belgium (19.2%), Italy (17.9%) and Spain (14%), while when the same comparison is made for 1991 (the most recently available figures) the most significant decreases in the level of investment were in the United Kingdom (42.1%) and in Denmark (28%).


## External trade

During the 1988-1992 period, for the whole textile/clothing industry, Community imports increased (in value) by 46.6% and (extra-Community) exports increased by 24.3%. The result has been a large increase in the trade deficit in textiles, including knitwear, from 872 million ECU to 3,750 ECU. The trade deficit in woven clothing went from 5,303 million ECU to 9,582 million ECU. In 1992 the deficit stabilized, although this development was due more to a stabilization of imports of textile/clothing products (1% increase) rather than to a large increase in exports (only 3.3%).

The largest increases of imports of textiles/clothing, comparing 1992 with 1988, were in Spain (219%), Portugal (90.8%), Greece (85%) and Germany (46%). As concerns exports, Portugal had the largest rise (44.8%), followed by Greece (41.5%), Germany and the Netherlands (30.3%), France (28%), Italy and Belgium (24%).

Looking now at the export/production ratio in the textile/clothing industry, it must be noted that the highest levels are not found in those Member States who have the most significant levels of production, but (in decreasing order of importance) in the Netherlands, Belgium, Ireland, Denmark and Portugal (table 1).

# Employment 1992

## Graph 1



**Textiles**

- I 28.1%
- F 11.6%
- D 16.1%
- Other 9.8%
- P 9.3%
- E 11.5%
- UK 13.7%

**Clothing**

- I 24.0%
- F 14.3%
- D 16.7%
- Other 7.8%
- P 11.3%
- E 11.0%
- UK 14.9%

**T. & C.**

- I 26.3%
- F 12.8%
- D 16.4%
- Other 8.9%
- P 10.1%
- E 11.3%
- UK 14.2%

OETH

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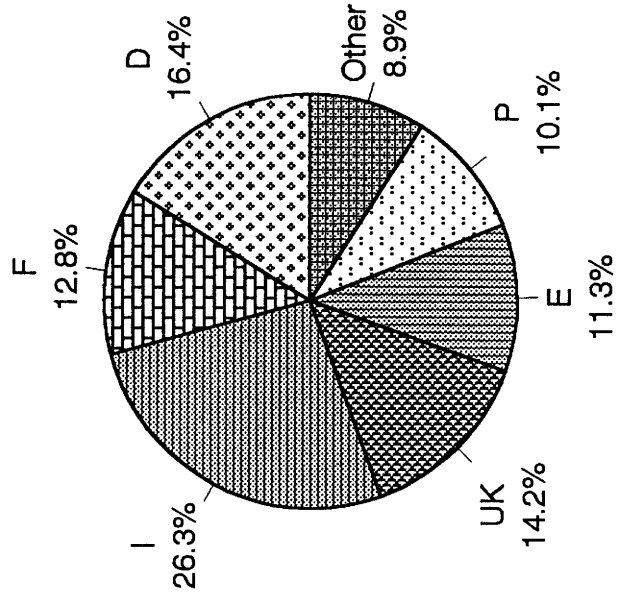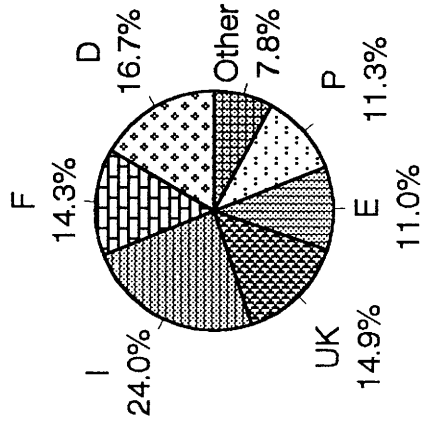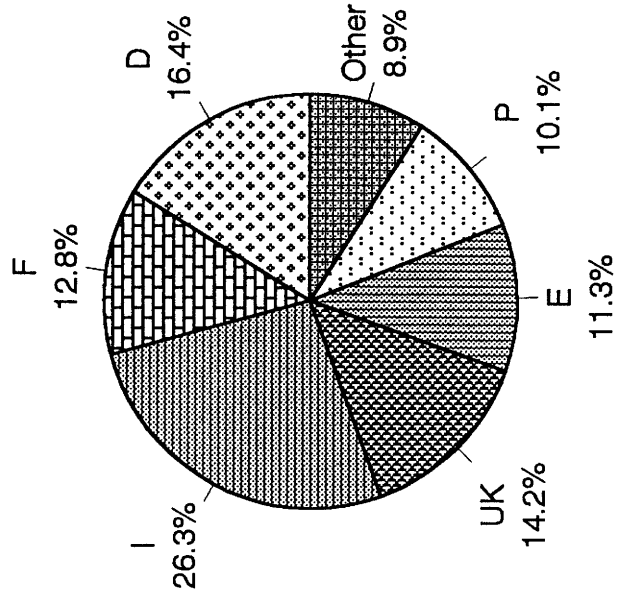
# Production 1992

Graph 2

constant prices 1985

### T. & C.

D 18.2%
Other 7.8%
E 5.4%
UK 10.9%
F 16.6%
B-L 4.2%
I 36.9%

### Clothing

D 17.7%
Other 5.8%
E 5.3%
UK 10.7%
F 19.1%
B-L 2.8%
I 38.6%

### Textiles

D 18.4%
Other 8.9%
E 5.5%
UK 11.0%
F 15.2%
B-L 5.0%
I 36.0%

OETH

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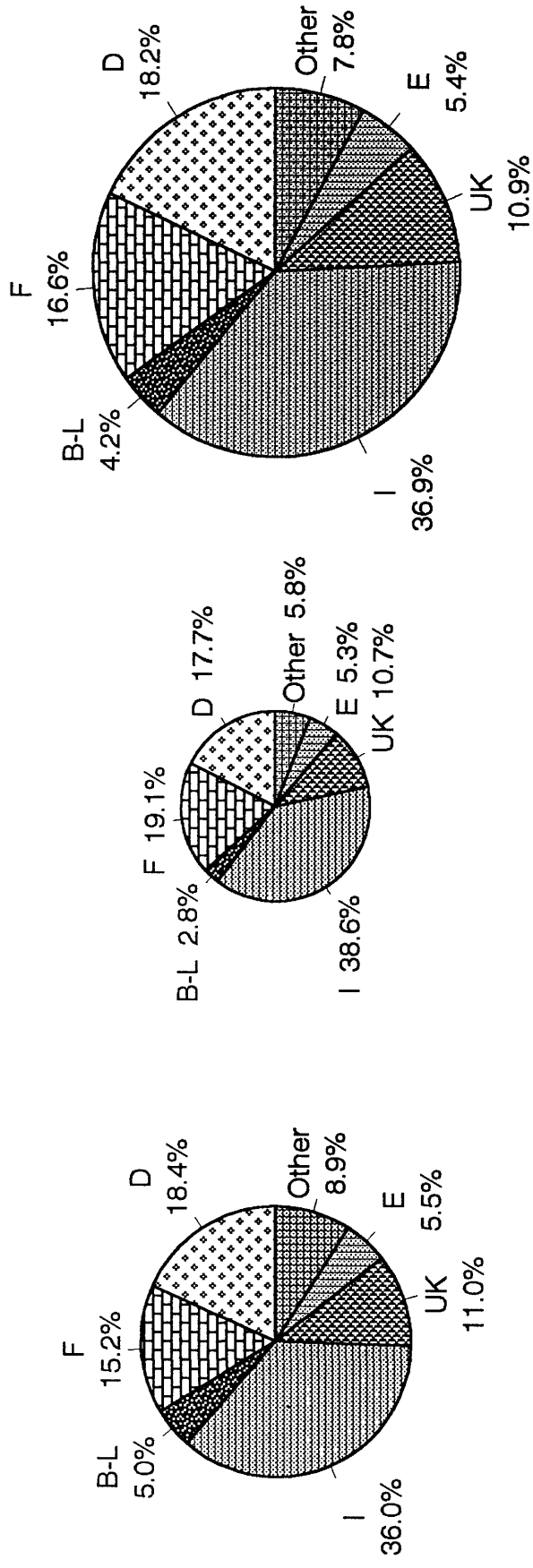
# Turnover 1992

## Graph 3

constant prices 1985

**Textiles**

- I 34.6%
- B-L 5.0%
- F 16.4%
- D 19.0%
- Other 8.6%
- E 5.4%
- UK 11.1%

**Clothing**

- I 37.6%
- B-L 3.1%
- F 19.6%
- D 18.0%
- Other 5.8%
- E 5.0%
- UK 10.8%

**T. & C.**

- I 35.7%
- B-L 4.4%
- F 17.5%
- D 18.6%
- Other 7.6%
- E 5.2%
- UK 11.0%

OETH

# Value added per employee 1992

OETH

Graph 4

**Textiles**

(000 ECU)

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| EC | B | DK | D | GR | E | F | IRL | I | NL | P | UK |

35 30 25 20 15 10 5 0

**Clothing**

(000 ECU)

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| EC | B | DK | D | GR | E | F | IRL | I | NL | P | UK |

35 30 25 20 15 10 5 0

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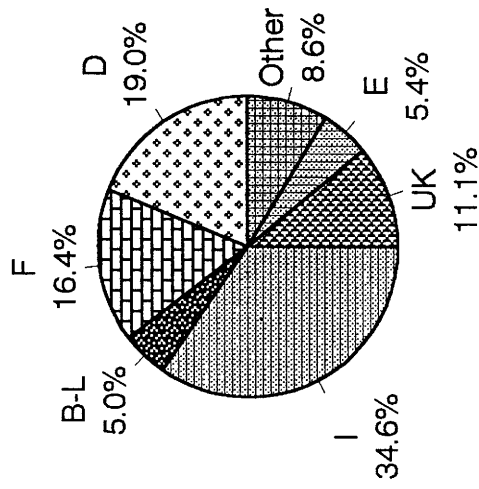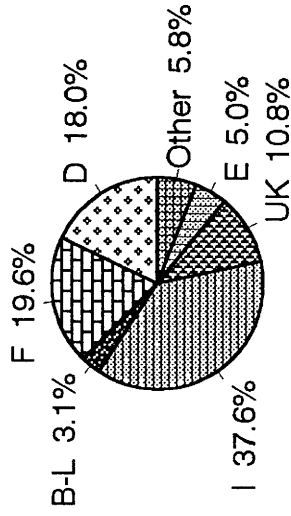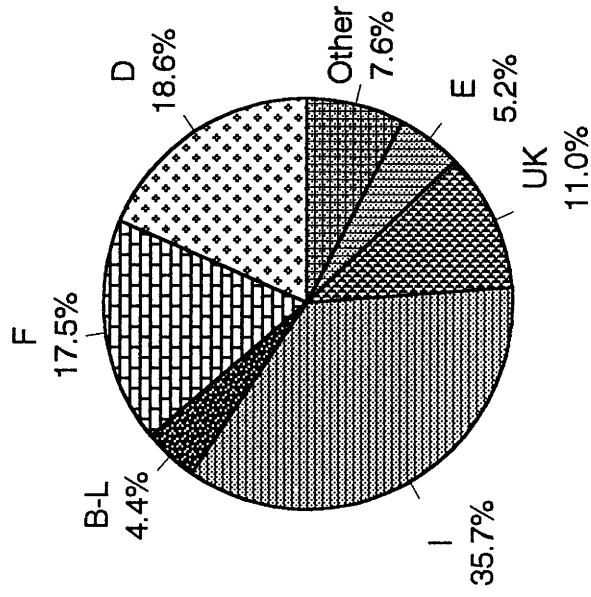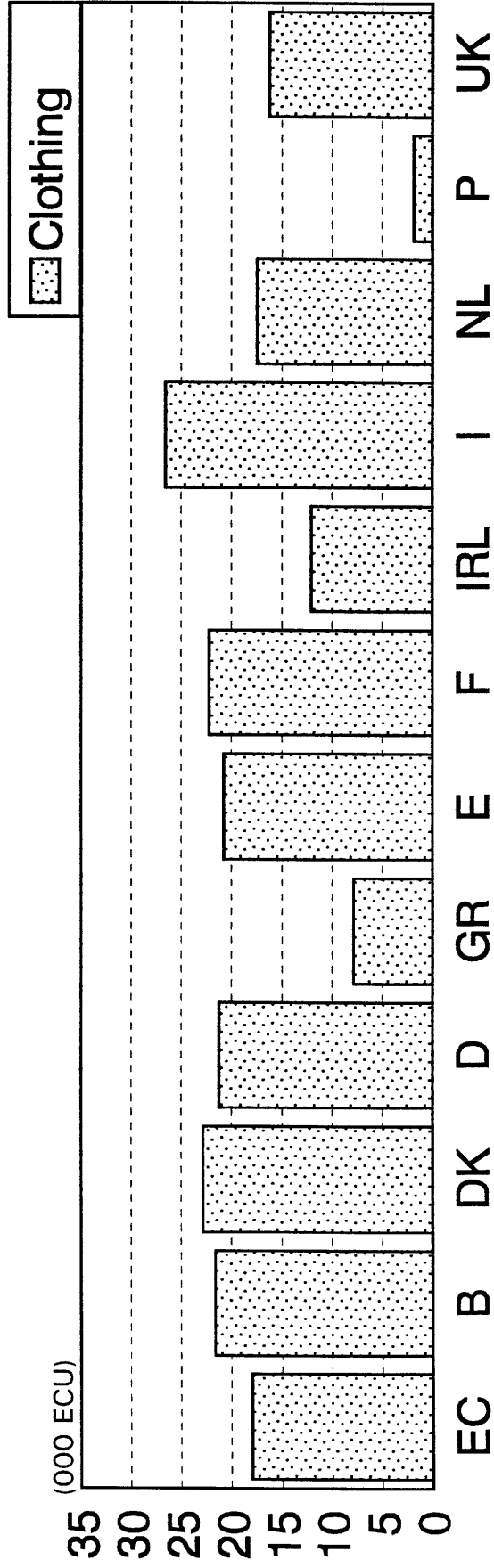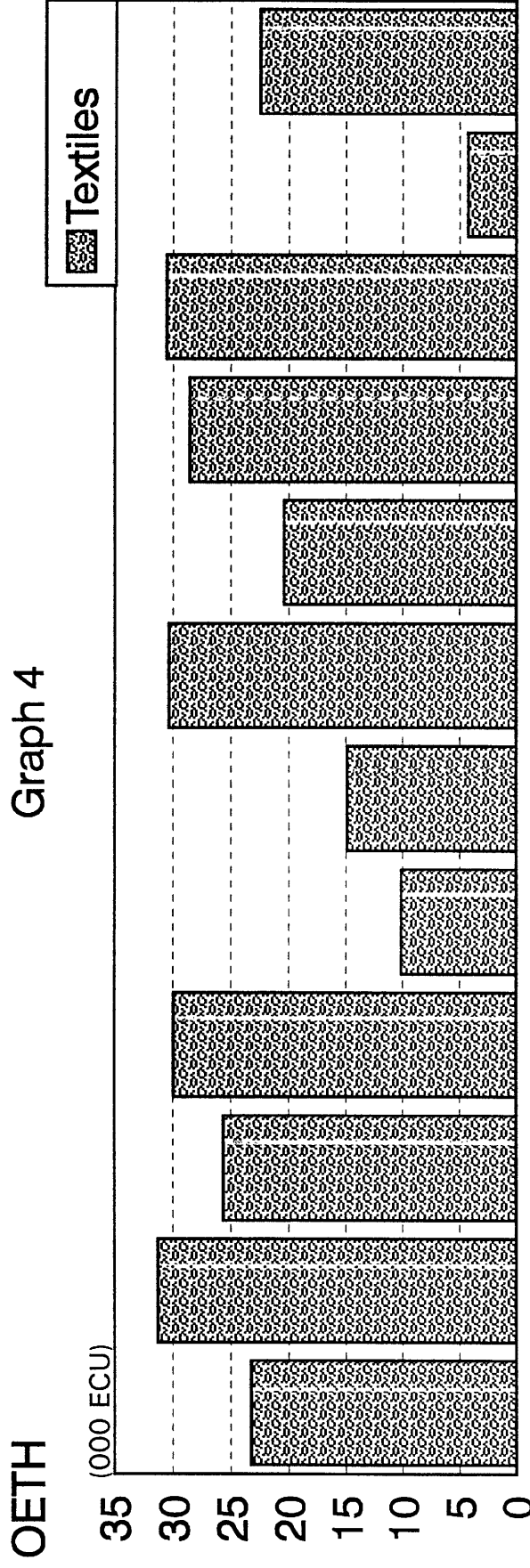
# Employment 1988-1992

Graph 5

(unit: 1,000)
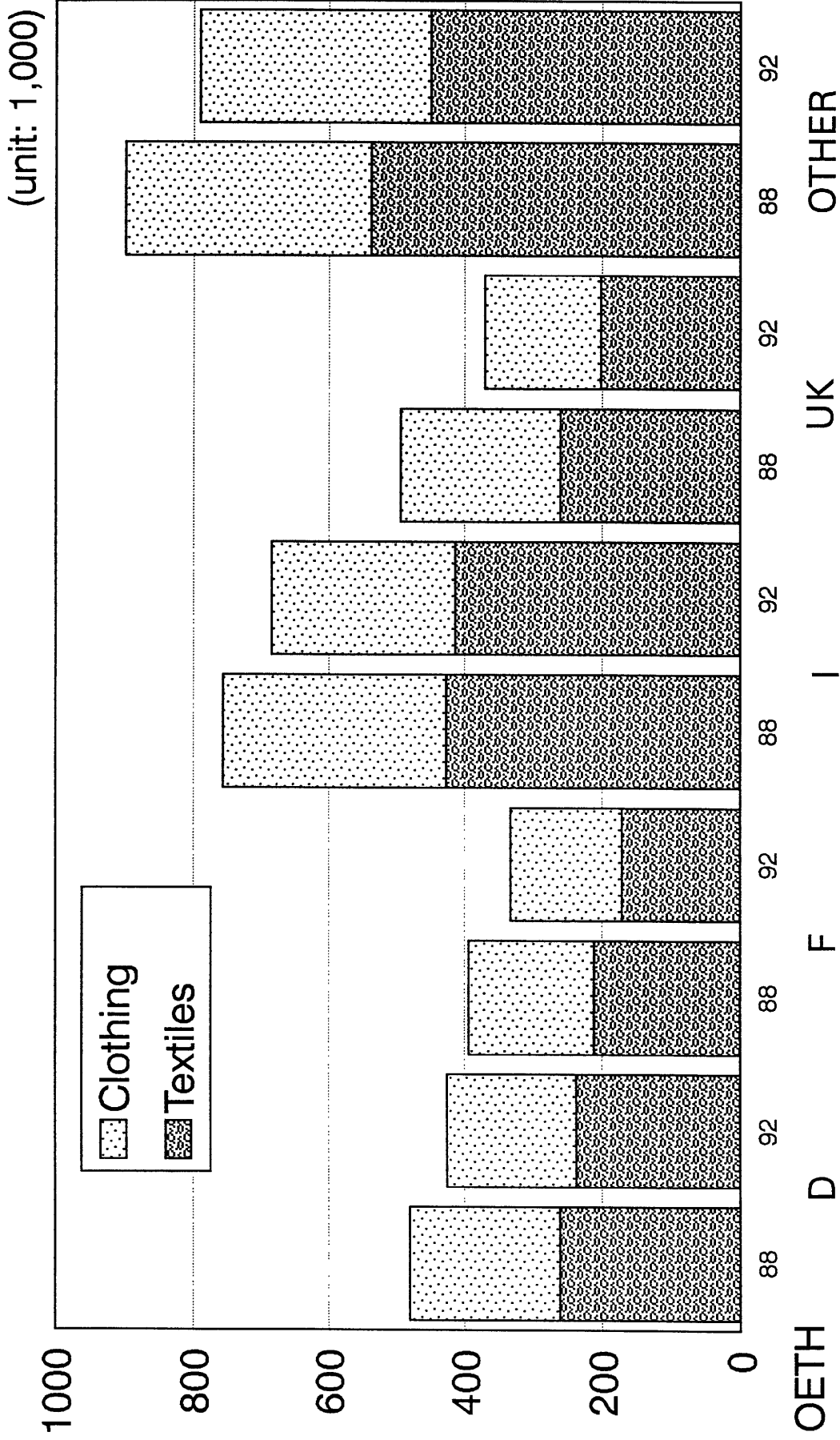
# Turnover 1988-1992

Graph 6

Bn ECU (constant prices 1985)



Legend:
- Clothing
- Textiles

Categories: OETH · D · F · I · UK · OTHER (years 88 / 92 / 88 / 92 / 88 / 92 / 88 / 92 / 88 / 92)

Y-axis: 0, 10, 20, 30, 40, 50, 60, 70
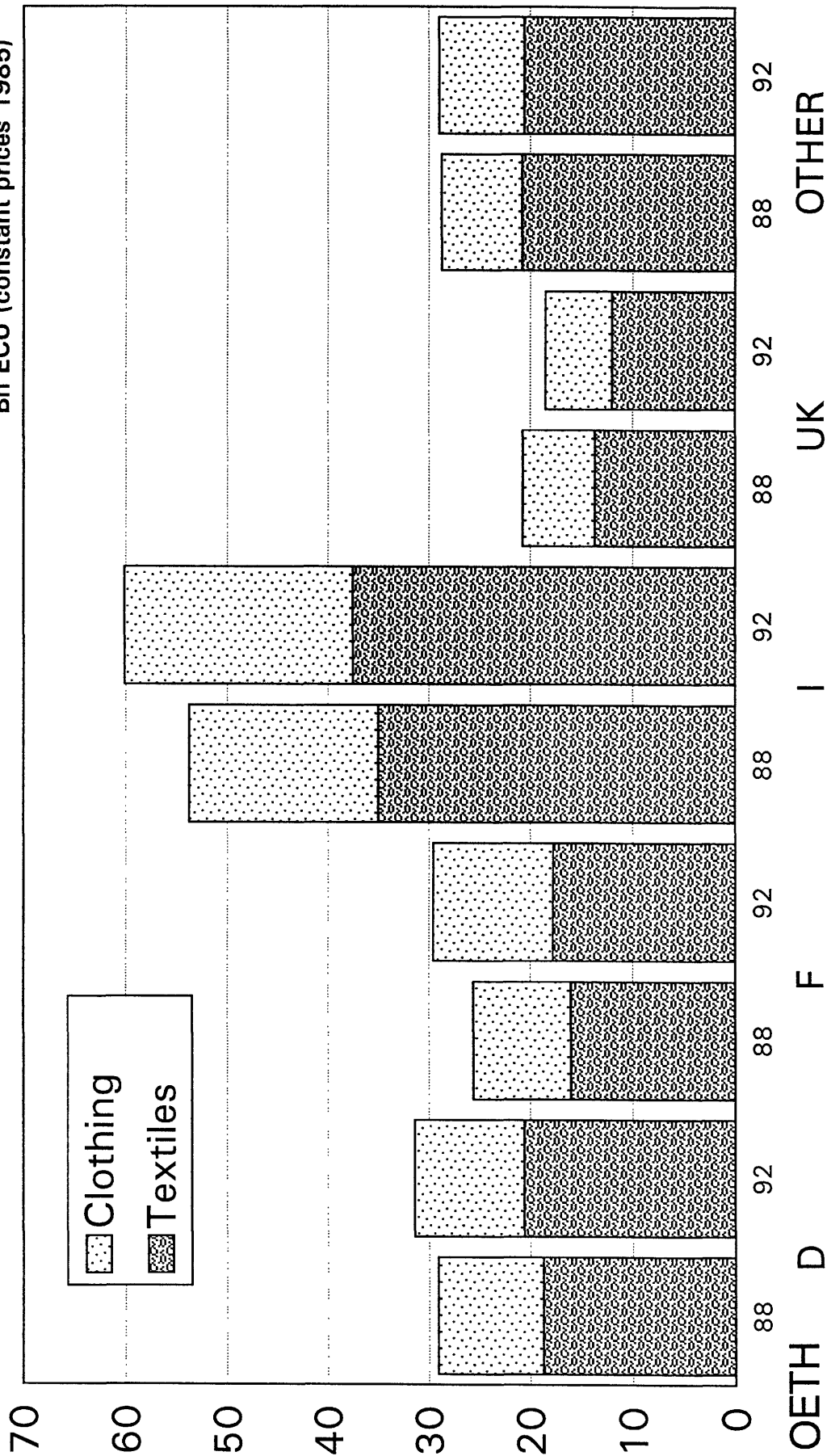
## II.    TABLES

TABLE 1

# THE STRUCTURE OF THE EC TEXTILE & CLOTHING INDUSTRY - 1992

## NACE 43 + 453-55

### Ranking per country based on employment

OETH

Constant prices (1985=100)

| Country | Production per employee ECU | Value added per employee (***) ECU | Production mn ECU | (%) | Employment | (%) | Exports/Production (%) (current prices) | Apparent Consumption mn ECU (current prices) | Apparent Consumption/head ECU (current prices) |
|---|---|---|---|---|---|---|---|---|---|
| Italy | 83,773 | 27,892 | 60,159 | 36.92 | 718,123 | 27.24 | 24.4 | 59,386 | 512 |
| Germany | 69,485 | 26,565 | 29,582 | 18.15 | 425,733 | 16.15 | 44.2 | 47,752 | 371 |
| United Kingdom | 48,010 | 19,765 | 17,758 | 10.90 | 369,882 | 14.03 | 29.2 | 24,403 | 211 |
| France | 81,387 | 26,854 | 27,059 | 16.61 | 332,472 | 12.61 | 30.3 | 33,127 | 291 |
| Spain | 29,961 | 16,503 | 8,825 | 5.42 | 294,550 | 11.17 | 18.9 | 12,640 | 162 |
| Portugal | 15,396 | 3,145 | 4,062 | 2.49 | 263,833 | 10.01 | 61.5 | 4,454 | 215 |
| Greece | 45,830 | 9,187 | 3,650 | 2.24 | 79,642 | 3.02 | 50.2 | 3,028 | 150 |
| Belgium (*) | 83,955 | 28,249 | 6,674 | 4.10 | 79,495 | 3.02 | 91.1 | 6,693 | 324 |
| Netherlands (**) | 85,377 | 26,977 | 2,597 | 1.59 | 30,418 | 1.15 | 138.0 | 5,960 | 196 |
| Ireland | 42,213 | 16,513 | 892 | 0.55 | 21,131 | 0.80 | 80.3 | 1,429 | 200 |
| Denmark | 76,019 | 24,642 | 1,546 | 0.95 | 20,337 | 0.77 | 78.3 | 2,348 | 227 |
| Luxembourg | ... | ... | 140 | 0.09 | 926 | 0.04 | ... | ... | ... |
| EC | 61,802 | 21,254 | 162,944 | 100 | 2,636,542 | 100 | 12.7 | 201,219 | 305 |

(*): Foreign trade data includes Luxembourg
(**): NACE 453-4: Production and Employment data are for enterprises with 20 employees or more
(***): Based on enterprises with 20 employees or more
EC foreign trade data only relates to Extra-EC trade.

TABLE 2

# THE STRUCTURE OF THE EC TEXTILE INDUSTRY (NACE 43+455) - 1992

OETH

Ranking per country based on employment

Constant prices (1985=100)

| Country | Production per employee ECU | Value added per employee (**) ECU | Production mn ECU | (%) | Employment | (%) | Exports/Production (%) (current prices) | Apparent Consumption mn ECU (current prices) | Apparent Consumption/head ECU (current prices) |
|---|---|---|---|---|---|---|---|---|---|
| Italy | 84,882 | 28,552 | 37,960 | 36.0 | 447,208 | 29.68 | 27.8 | 35,490 | 612 |
| Germany | 81,959 | 29,950 | 19,392 | 18.4 | 236,606 | 15.71 | 49.6 | 28,500 | 443 |
| United Kingdom | 57,521 | 22,452 | 11,619 | 11.0 | 201,995 | 13.41 | 33.0 | 15,611 | 270 |
| France | 93,865 | 30,336 | 16,050 | 15.2 | 170,991 | 11.35 | 37.4 | 18,577 | 326 |
| Spain | 34,178 | 14,882 | 5,803 | 5.5 | 169,790 | 11.27 | 24.7 | 7,225 | 185 |
| Portugal | 21,158 | 4,239 | 2,884 | 2.7 | 136,311 | 9.05 | 60.5 | 3,337 | 323 |
| Belgium (*) | 97,239 | 31,293 | 5,089 | 4.8 | 52,335 | 3.47 | 99.0 | 3,864 | 374 |
| Greece | 61,055 | 10,137 | 2,712 | 2.6 | 44,419 | 2.95 | 57.7 | 2,044 | 202 |
| Netherlands | 92,958 | 30,538 | 2,103 | 2.0 | 22,623 | 1.50 | 121.4 | 3,885 | 256 |
| Denmark | 83,983 | 25,658 | 1,055 | 1.0 | 12,562 | 0.83 | 84.4 | 1,520 | 294 |
| Ireland | 56,272 | 20,408 | 628 | 0.6 | 11,160 | 0.74 | 89.9 | 869 | 243 |
| Luxembourg | 255,894 | ... | 135 | 0.1 | 526 | 0.03 | ... | ... | ... |
| EC | 69,982 | 23,289 | 105,430 | 100 | 1,506,526 | 100 | 14.5 | 120,921 | 366 |

(*): Foreign trade data includes Luxembourg
(**): Based on enterprises with 20 employees or more
EC foreign trade data only relates to Extra-EC trade.

TABLE 3

# THE STRUCTURE OF THE EC CLOTHING INDUSTRY (NACE 453+454) - 1992

OETH

Ranking per country based on employment

Constant prices (1985=100)

| Country | Production per employee ECU | Value added per employee (***) ECU | Production mn ECU | (%) | Employment | (%) | Exports/Production (%) (current prices) | Apparent Consumption mn ECU (current prices) | Apparent Consumption/head ECU (current prices) |
|---|---|---|---|---|---|---|---|---|---|
| Italy | 81,941 | 26,540 | 22,199 | 38.60 | 270,915 | 23.97 | 19.0 | 23,896 | 412 |
| Germany | 53,879 | 21,210 | 10,190 | 17.72 | 189,127 | 16.74 | 34.3 | 19,252 | 300 |
| United Kingdom | 36,566 | 16,263 | 6,139 | 10.67 | 167,887 | 14.86 | 22.5 | 8,792 | 152 |
| France | 68,175 | 22,222 | 11,009 | 19.14 | 161,481 | 14.29 | 21.2 | 14,550 | 256 |
| Portugal | 9,238 | 1,819 | 1,178 | 2.05 | 127,522 | 11.28 | 63.5 | 1,117 | 108 |
| Spain | 24,223 | 20,778 | 3,022 | 5.25 | 124,760 | 11.04 | 10.4 | 5,415 | 138 |
| Greece | 26,630 | 7,831 | 938 | 1.63 | 35,223 | 3.12 | 35.1 | 984 | 97 |
| Belgium (*) | 58,358 | 21,598 | 1,585 | 2.76 | 27,160 | 2.40 | 70.3 | 2,829 | 274 |
| Ireland | 26,477 | 12,029 | 264 | 0.46 | 9,971 | 0.88 | 58.7 | 560 | 157 |
| Netherlands (**) | 63,374 | 17,447 | 494 | 0.86 | 7,795 | 0.69 | 203.1 | 2,076 | 137 |
| Denmark | 63,151 | 22,802 | 491 | 0.85 | 7,775 | 0.69 | 65.8 | 828 | 160 |
| Luxembourg | 13,975 | ... | 6 | 0.01 | 400 | 0.04 | ... | ... | ... |
| EC | 50,897 | 17,962 | 57,514 | 100 | 1,130,016 | 100 | 9.8 | 80,298 | 243 |

(*): Foreign trade data includes Luxembourg
(**): Production and Employment data are for enterprises with 20 employees or more
(***): Based on enterprises with 20 employees or more
EC foreign trade data only relates to Extra-EC trade.

TABLE 4

## The structure of the textile & clothing industry 1988 - 1992      OETH

## EC

| Industry | All enterprises | 1988 | 1989 | 1990 | 1991 | 1992 | AAR (%) |
|---|---|---|---|---|---|---|---|
| TEXTILES and CLOTHING (NACE 43+453-55) | Employment | 3,070,814 | 3,006,558 | 2,914,049 | 2,789,854 | 2,636,542 | -3.7 |
| | Number of enterprises | 147,832 | 155,433 | 155,653 | 153,913 | 151,905 | 0.7 |
| | Turnover | 157,729 | 164,691 | 167,861 | 168,072 | 168,431 | 1.7 |
| | Value added (f.c.) (*) | 41,464 | 41,263 | 42,521 | 42,063 | 41,379 | -0.0 |
| | Investment (*) | 6,173 | 6,167 | 6,094 | 5,699 | 5,335 | -3.5 |
| | Imports (extra-EC) | 25,351 | 28,288 | 31,386 | 36,789 | 37,168 | 10.2 |
| | Exports (extra-EC) | 19,176 | 22,246 | 23,051 | 23,071 | 23,836 | 5.8 |
| TEXTILES (NACE 43 + 455) | Employment | 1,745,124 | 1,720,011 | 1,650,878 | 1,592,272 | 1,506,526 | -3.6 |
| | Number of enterprises | 64,035 | 66,367 | 66,093 | 64,628 | 62,620 | -0.5 |
| | Turnover | 104,182 | 107,588 | 108,524 | 108,694 | 108,422 | 1.0 |
| | Value added (f.c.) (*) | 28,516 | 28,081 | 28,653 | 28,543 | 28,023 | -0.4 |
| | Investment (*) | 5,100 | 4,989 | 4,854 | 4,625 | 4,326 | -4.0 |
| | Imports (extra-EC) | 14,955 | 16,351 | 17,605 | 20,105 | 20,694 | 8.5 |
| | Exports (extra-EC) | 14,083 | 16,028 | 16,324 | 16,389 | 16,944 | 4.9 |
| CLOTHING (NACE 453-4) | Employment | 1,325,690 | 1,286,547 | 1,263,171 | 1,197,582 | 1,130,016 | -3.9 |
| | Number of enterprises | 83,797 | 89,066 | 89,560 | 89,285 | 89,285 | 2.2 |
| | Turnover | 53,547 | 57,103 | 59,337 | 59,378 | 60,009 | 2.9 |
| | Value added (f.c.) (*) | 12,948 | 13,182 | 13,868 | 13,520 | 13,356 | 0.8 |
| | Investment (*) | 1,074 | 1,178 | 1,240 | 1,074 | 1,009 | 0.5 |
| | Imports (extra-EC) | 10,396 | 11,937 | 13,781 | 16,684 | 16,474 | 12.5 |
| | Exports (extra-EC) | 5,093 | 6,218 | 6,727 | 6,682 | 6,892 | 8.2 |

Notes:
Values: Mn ECU; Turnover & Value Added are in constant prices (1985=100)
(*): Data for enterprises with more than 20 employees only.
f.c. = at factor cost
NACE 43 includes the knitting industry

TABLE 5

# The structure of the textile & clothing industry 1988 - 1992    OETH

## Belgium

| Industry | All enterprises | 1988 | 1989 | 1990 | 1991 | 1992 | AAR (%) |
|---|---|---|---|---|---|---|---|
| TEXTILES and CLOTHING (NACE 43+453-55) | Employment | 86,878 | 87,541 | 87,132 | 82,649 | 79,495 | -2.2 |
| | Number of enterprises | 2,930 | 2,915 | 2,904 | 2,857 | 2,857 | -0.8 |
| | Turnover | 6,118 | 6,531 | 6,995 | 6,666 | 7,168 | 4.2 |
| | Value added (f.c.) (*) | 1,701 | 1,833 | 1,984 | 1,908 | 1,954 | 3.6 |
| | Investment (*) | 400 | 367 | 362 | 326 | 323 | -5.1 |
| | Imports (**) | 4,545 | 4,908 | 5,494 | 5,826 | 6,044 | 7.4 |
| | Exports (**) | 5,329 | 6,040 | 6,479 | 6,625 | 6,658 | 5.8 |
| TEXTILES (NACE 43 + 455) | Employment | 56,546 | 56,901 | 55,505 | 53,174 | 52,335 | -1.9 |
| | Number of enterprises | 1,458 | 1,472 | 1,461 | 1,414 | 1,414 | -1.0 |
| | Turnover | 4,881 | 5,076 | 5,348 | 4,940 | 5,312 | 2.3 |
| | Value added (f.c.) (*) | 1,378 | 1,445 | 1,558 | 1,455 | 1,485 | 2.0 |
| | Investment (*) | 366 | 331 | 326 | 290 | 287 | -5.8 |
| | Imports (**) | 3,147 | 3,339 | 3,610 | 3,792 | 3,814 | 5.0 |
| | Exports (**) | 4,490 | 5,057 | 5,268 | 5,310 | 5,244 | 4.1 |
| CLOTHING (NACE 453-4) | Employment | 30,332 | 30,640 | 31,627 | 29,475 | 27,160 | -2.6 |
| | Number of enterprises | 1,472 | 1,443 | 1,443 | 1,443 | 1,443 | -2.0 |
| | Turnover | 1,237 | 1,455 | 1,647 | 1,726 | 1,856 | 10.8 |
| | Value added (f.c.) (*) | 323 | 388 | 426 | 453 | 469 | 9.9 |
| | Investment (*) | 34 | 36 | 36 | 36 | 36 | 5.9 |
| | Imports (**) | 1,398 | 1,569 | 1,884 | 2,034 | 2,230 | 12.5 |
| | Exports (**) | 839 | 983 | 1,211 | 1,315 | 1,414 | 14.1 |

Notes:
Values: Mn ECU; Turnover & Value Added are in constant prices (1985=100)
(*): Data for enterprises with more than 20 employees only; (**): Foreign trade data includes Luxembourg.
f.c. = at factor cost
NACE 43 includes the knitting industry

TABLE 6

# The structure of the textile & clothing industry 1988 - 1992     OETH
## Luxembourg

| Industry | All enterprises | 1988 | 1989 | 1990 | 1991 | 1992 | AAR (%) |
|---|---|---|---|---|---|---|---|
| **TEXTILES and CLOTHING** (NACE 43+453-55) | Employment | 942 | 920 | 926 | 926 | 926 | -0.8 |
| | Number of enterprises | 67 | 65 | 72 | 72 | 72 | 3.9 |
| | Turnover | 86 | 148 | 161 | 161 | 161 | 40.1 |
| | Value added (f.c.) (*) | ... | ... | ... | ... | ... | |
| | Investment (*) | 47 | 5 | 13 | 13 | 13 | 30.1 |
| | Imports | ... | ... | ... | ... | ... | |
| | Exports | ... | ... | ... | ... | ... | |
| **TEXTILES** (NACE 43 + 455) | Employment | 523 | 512 | 526 | 526 | 526 | 0.3 |
| | Number of enterprises | 21 | 21 | 21 | 21 | 21 | |
| | Turnover | 81 | 143 | 156 | 156 | 156 | 42.7 |
| | Value added (f.c.) (*) | ... | ... | ... | ... | ... | ... |
| | Investment (*) | 47 | 5 | 13 | 13 | 13 | 35.3 |
| | Imports | ... | ... | ... | ... | ... | ... |
| | Exports | ... | ... | ... | ... | ... | ... |
| **CLOTHING** (NACE 453-4) | Employment | 419 | 408 | 400 | 400 | 400 | -2.3 |
| | Number of enterprises | 46 | 44 | 51 | 51 | 51 | 5.8 |
| | Turnover | 5.1 | 4.8 | 4.7 | 4.7 | 4.7 | -4.0 |
| | Value added (f.c.) (*) | ... | ... | ... | ... | ... | |
| | Investment (*) | 0.2 | 0.3 | 0.2 | 0.2 | 0.2 | 8.3 |
| | Imports | ... | ... | ... | ... | ... | ... |
| | Exports | ... | ... | ... | ... | ... | ... |

Notes:
Values: Mn ECU; Turnover & Value Added are in constant prices (1985=100)
(*): Data for enterprises with more than 20 employees only.
f.c. = at factor cost
NACE 43 includes the knitting industry

TABLE 7

# The structure of the textile & clothing industry 1988 - 1992    OETH

## Denmark

| Industry | All enterprises | 1988 | 1989 | 1990 | 1991 | 1992 | AAR (%) |
|---|---|---|---|---|---|---|---|
| TEXTILES and CLOTHING (NACE 43+453-55) | Employment | 24,821 | 23,617 | 22,319 | 21,194 | 20,337 | -4.9 |
| | Number of enterprises | 1,224 | 1,139 | 1,022 | 948 | 948 | -6.1 |
| | Turnover | 1,756 | 1,681 | 1,577 | 1,567 | 1,585 | -2.5 |
| | Value added (f.c.) (*) | 464 | 389 | 431 | 434 | 401 | -3.1 |
| | Investment | 103 | 114 | 91 | 74 | 74 | -9.4 |
| | Imports | 1,436 | 1,504 | 1,625 | 1,952 | 1,950 | 8.2 |
| | Exports | 990 | 1,043 | 1,179 | 1,326 | 1,433 | 9.7 |
| TEXTILES (NACE 43 + 455) | Employment | 15,958 | 15,136 | 13,836 | 12,976 | 12,562 | -5.8 |
| | Number of enterprises | 698 | 670 | 607 | 545 | 545 | -5.9 |
| | Turnover | 1,246 | 1,200 | 1,085 | 1,079 | 1,085 | -3.3 |
| | Value added (f.c.) (*) | 358 | 286 | 292 | 292 | 269 | -6.5 |
| | Investment | 84 | 92 | 67 | 62 | 62 | -8.4 |
| | Imports | 1,025 | 1,056 | 1,101 | 1,283 | 1,329 | 6.9 |
| | Exports | 773 | 797 | 876 | 940 | 1,035 | 7.6 |
| CLOTHING (NACE 453-4) | Employment | 8,863 | 8,481 | 8,483 | 8,218 | 7,775 | -3.2 |
| | Number of enterprises | 526 | 469 | 415 | 403 | 403 | -8.4 |
| | Turnover | 510 | 481 | 492 | 488 | 500 | -0.4 |
| | Value added (f.c.) (*) | 106 | 103 | 139 | 142 | 132 | 6.8 |
| | Investment | 19 | 22 | 24 | 12 | 12 | -8.4 |
| | Imports | 411 | 448 | 524 | 669 | 621 | 11.6 |
| | Exports | 217 | 246 | 303 | 386 | 398 | 16.8 |

Notes:
Values: Mn ECU; Turnover & Value Added are in constant prices (1985=100)
(*): Data for enterprises with more than 20 employees only.
f.c. = at factor cost
NACE 43 includes the knitting industry

TABLE 8

# The structure of the textile & clothing industry 1988 - 1992    OETH

## Germany

| Industry | All enterprises | 1988 | 1989 | 1990 | 1991 | 1992 | AAR (%) |
|---|---|---|---|---|---|---|---|
| **TEXTILES** and **CLOTHING** (NACE 43+453-55) | Employment | 479,881 | 478,553 | 468,188 | 459,787 | 425,733 | -2.9 |
| | Number of enterprises | 33,649 | 33,714 | 33,090 | 32,720 | 32,351 | -1.0 |
| | Turnover | 29,026 | 30,748 | 32,037 | 33,410 | 31,371 | 2.1 |
| | Value added (f.c.) (*) | 8,602 | 8,790 | 8,995 | 9,513 | 8,943 | 1.1 |
| | Investment (*) | 1,112 | 1,187 | 1,302 | 1,224 | 1,104 | 0.2 |
| | Imports | 18,898 | 20,733 | 23,906 | 28,360 | 27,710 | 10.3 |
| | Exports | 12,176 | 13,721 | 14,608 | 15,296 | 15,866 | 6.9 |
| **TEXTILES** (NACE 43 + 455) | Employment | 260,794 | 260,310 | 254,540 | 251,233 | 236,606 | -2.4 |
| | Number of enterprises | 8,801 | 8,931 | 8,880 | 8,510 | 8,141 | -1.9 |
| | Turnover | 18,721 | 19,807 | 20,570 | 21,559 | 20,554 | 2.4 |
| | Value added (f.c.) (*) | 5,902 | 5,991 | 6,144 | 6,496 | 6,178 | 1.2 |
| | Investment (*) | 947 | 988 | 1,104 | 1,026 | 906 | -0.7 |
| | Imports | 11,563 | 12,436 | 13,995 | 16,521 | 16,841 | 10.0 |
| | Exports | 9,191 | 10,236 | 10,731 | 11,165 | 11,481 | 5.8 |
| **CLOTHING** (NACE 453-4) | Employment | 219,087 | 218,243 | 213,648 | 208,554 | 189,127 | -3.5 |
| | Number of enterprises | 24,848 | 24,783 | 24,210 | 24,210 | 24,210 | -1.3 |
| | Turnover | 10,305 | 10,941 | 11,467 | 11,851 | 10,817 | 1.4 |
| | Value added (f.c.) (*) | 2,700 | 2,799 | 2,851 | 3,017 | 2,765 | 0.7 |
| | Investment (*) | 165 | 199 | 198 | 198 | 198 | 10.1 |
| | Imports | 7,335 | 8,297 | 9,911 | 11,839 | 10,869 | 11.0 |
| | Exports | 2,985 | 3,485 | 3,877 | 4,131 | 4,385 | 10.2 |

Notes:
Values: Mn ECU; Turnover & Value Added are in constant prices (1985=100)
(*): Data for enterprises with more than 20 employees only.
f.c. = at factor cost
NACE 43 includes the knitting industry
The data for Germany covers former West Germany only, except for import & export data from 1991.

TABLE 9

# The structure of the textile & clothing industry 1988 - 1992      OETH

## Greece

| Industry | All enterprises | 1988 | 1989 | 1990 | 1991 | 1992 | AAR (%) |
|---|---|---|---|---|---|---|---|
| TEXTILES and CLOTHING (NACE 43+453-55) | Employment | 96,378 | 95,076 | 88,038 | 82,397 | 79,642 | -4.6 |
| | Number of enterprises | 2,010 | 1,992 | 1,989 | 1,905 | 1,905 | -1.8 |
| | Turnover | 3,403 | 3,468 | 3,441 | 3,491 | 3,483 | 0.6 |
| | Value added (f.c.) (*) | 762 | 709 | 707 | 669 | 621 | -4.9 |
| | Investment (*) | 191 | 176 | 148 | 148 | 148 | -11.9 |
| | Imports | 740 | 1,111 | 1,274 | 1,320 | 1,369 | 18.0 |
| | Exports | 1,180 | 1,494 | 1,559 | 1,634 | 1,670 | 9.5 |
| TEXTILES (NACE 43 + 455) | Employment | 57,402 | 55,699 | 49,323 | 46,095 | 44,419 | -6.1 |
| | Number of enterprises | 871 | 862 | 804 | 720 | 720 | -6.1 |
| | Turnover | 2,672 | 2,700 | 2,626 | 2,604 | 2,528 | -1.4 |
| | Value added (f.c.) (*) | 554 | 497 | 486 | 443 | 403 | -7.6 |
| | Investment (*) | 164 | 151 | 116 | 116 | 116 | -15.6 |
| | Imports | 654 | 950 | 1,076 | 1,093 | 1,109 | 15.4 |
| | Exports | 905 | 1,151 | 1,181 | 1,232 | 1,278 | 9.5 |
| CLOTHING (NACE 453-4) | Employment | 38,976 | 39,377 | 38,715 | 36,302 | 35,223 | -2.5 |
| | Number of enterprises | 1,139 | 1,130 | 1,185 | 1,185 | 1,185 | 2.0 |
| | Turnover | 731 | 768 | 815 | 887 | 955 | 6.9 |
| | Value added (f.c.) (*) | 208 | 212 | 221 | 226 | 218 | 1.2 |
| | Investment (*) | 27 | 25 | 32 | 32 | 32 | 10.3 |
| | Imports | 86 | 161 | 198 | 227 | 260 | 34.8 |
| | Exports | 275 | 343 | 378 | 402 | 392 | 9.7 |

Notes:
Values: Mn ECU; Turnover & Value Added are in constant prices (1985=100)
(*): Data for enterprises with more than 20 employees only.
f.c. = at factor cost
NACE 43 includes the knitting industry

TABLE 10

# The structure of the textile & clothing industry 1988 - 1992      OETH

## Spain

| Industry | All enterprises | 1988 | 1989 | 1990 | 1991 | 1992 | AAR (%) |
|---|---|---|---|---|---|---|---|
| TEXTILES and CLOTHING (NACE 43+453-55) | Employment | 346,617 | 334,330 | 325,873 | 313,150 | 294,550 | -4.0 |
| | Number of enterprises | 16,419 | 18,298 | 17,958 | 17,868 | 17,599 | 1.9 |
| | Turnover (**) | 8,948 | 9,269 | 9,305 | 8,789 | 8,825 | -0.3 |
| | Value added (f.c.) (*) | 3,344 | 3,636 | 3,697 | 3,405 | 3,380 | 0.4 |
| | Investment | 313 | 325 | 286 | 276 | 263 | -4.1 |
| | Imports | 1,197 | 1,817 | 2,390 | 3,243 | 3,826 | 34.2 |
| | Exports | 1,654 | 1,762 | 1,891 | 1,967 | 2,054 | 5.6 |
| TEXTILES (NACE 43 + 455) | Employment | 197,617 | 192,330 | 187,873 | 180,062 | 169,790 | -3.7 |
| | Number of enterprises | 7,661 | 8,402 | 8,062 | 7,972 | 7,703 | 0.3 |
| | Turnover (**) | 6,074 | 6,369 | 6,085 | 5,792 | 5,803 | -1.1 |
| | Value added (f.c.) (*) | 2,153 | 2,436 | 2,370 | 2,194 | 2,210 | 0.9 |
| | Investment | 272 | 252 | 216 | 206 | 193 | -8.1 |
| | Imports | 906 | 1,342 | 1,644 | 2,116 | 2,344 | 27.5 |
| | Exports | 1,313 | 1,378 | 1,484 | 1,548 | 1,599 | 5.1 |
| CLOTHING (NACE 453-4) | Employment | 149,000 | 142,000 | 138,000 | 133,088 | 124,760 | -4.3 |
| | Number of enterprises | 8,758 | 9,896 | 9,896 | 9,896 | 9,896 | 13.0 |
| | Turnover (**) | 2,874 | 2,900 | 3,220 | 2,997 | 3,022 | 1.5 |
| | Value added (f.c.) (*) | 1,191 | 1,200 | 1,327 | 1,211 | 1,170 | -0.2 |
| | Investment | 41 | 73 | 70 | 70 | 70 | 37.0 |
| | Imports | 291 | 475 | 746 | 1,127 | 1,482 | 50.7 |
| | Exports | 341 | 384 | 407 | 419 | 455 | 7.5 |

Notes:
Values: Mn ECU; Turnover & Value Added are in constant prices (1985=100)
(*): Data for enterprises with more than 20 employees only.
(**): Turnover is based on data for production
f.c. = at factor cost
NACE 43 includes the knitting industry

TABLE 11

# The structure of the textile & clothing industry 1988 - 1992 — OETH
## France

| Industry | All enterprises | 1988 | 1989 | 1990 | 1991 | 1992 | AAR (%) |
|---|---|---|---|---|---|---|---|
| TEXTILES and CLOTHING (NACE 43+453-55) | Employment | 393,370 | 379,117 | 363,676 | 351,233 | 332,472 | -4.1 |
| | Number of enterprises | 15,293 | 14,979 | 16,620 | 16,943 | 16,871 | 2.6 |
| | Turnover | 25,555 | 26,149 | 28,799 | 29,106 | 29,545 | 3.8 |
| | Value added (f.c.) (*) | 7,044 | 6,488 | 7,313 | 7,184 | 7,090 | 0.4 |
| | Investment | 898 | 941 | 1,035 | 953 | 950 | 1.6 |
| | Imports | 9,364 | 10,643 | 11,716 | 12,151 | 12,571 | 7.7 |
| | Exports | 6,948 | 8,033 | 8,501 | 8,577 | 8,916 | 6.6 |
| TEXTILES (NACE 43 + 455) | Employment | 211,083 | 204,402 | 188,926 | 181,498 | 170,991 | -5.1 |
| | Number of enterprises | 5,077 | 5,080 | 5,048 | 5,102 | 5,030 | -0.2 |
| | Turnover | 16,012 | 16,513 | 17,344 | 17,544 | 17,790 | 2.7 |
| | Value added (f.c.) (*) | 4,729 | 4,327 | 4,612 | 4,591 | 4,572 | -0.7 |
| | Investment | 677 | 689 | 749 | 681 | 678 | 0.2 |
| | Imports | 6,638 | 7,393 | 7,925 | 8,058 | 8,228 | 5.6 |
| | Exports | 5,129 | 5,780 | 5,935 | 5,987 | 6,177 | 4.9 |
| CLOTHING (NACE 453-4) | Employment | 182,287 | 174,715 | 174,750 | 169,735 | 161,481 | -3.0 |
| | Number of enterprises | 10,216 | 9,899 | 11,572 | 11,841 | 11,841 | 5.4 |
| | Turnover | 9,543 | 9,636 | 11,455 | 11,562 | 11,755 | 5.6 |
| | Value added (f.c.) (*) | 2,315 | 2,161 | 2,701 | 2,593 | 2,518 | 2.9 |
| | Investment | 221 | 252 | 286 | 272 | 272 | 7.5 |
| | Imports | 2,726 | 3,250 | 3,791 | 4,093 | 4,343 | 12.5 |
| | Exports | 1,819 | 2,253 | 2,566 | 2,590 | 2,739 | 11.1 |

Notes:
Values: Mn ECU; Turnover & Value Added are in constant prices (1985=100)
(*): Data for enterprises with more than 20 employees only.
f.c. = at factor cost
NACE 43 includes the knitting industry

TABLE 12

# The structure of the textile & clothing industry 1988 - 1992  OETH

## Ireland

| Industry | All enterprises | 1988 | 1989 | 1990 | 1991 | 1992 | AAR (%) |
|---|---|---|---|---|---|---|---|
| TEXTILES and CLOTHING (NACE 43+453-55) | Employment | 22,521 | 22,177 | 22,445 | 21,672 | 21,131 | -1.6 |
| | Number of enterprises | 480 | 481 | 488 | 495 | 495 | 1.0 |
| | Turnover | 901 | 938 | 920 | 902 | 913 | 0.4 |
| | Value added (f.c.) (*) | 296 | 308 | 310 | 305 | 313 | 1.4 |
| | Investment | 49 | 50 | 50 | 50 | 50 | 1.2 |
| | Imports | 1,008 | 1,086 | 1,160 | 1,211 | 1,232 | 5.2 |
| | Exports | 659 | 698 | 736 | 791 | 803 | 5.1 |
| TEXTILES (NACE 43 + 455) | Employment | 11,598 | 11,662 | 11,706 | 11,375 | 11,160 | -0.9 |
| | Number of enterprises | 232 | 233 | 240 | 247 | 247 | 2.1 |
| | Turnover | 598 | 651 | 627 | 633 | 646 | 2.0 |
| | Value added (f.c.) (*) | 182 | 201 | 200 | 202 | 207 | 3.4 |
| | Investment | 40 | 39 | 39 | 39 | 39 | -2.5 |
| | Imports | 696 | 739 | 783 | 798 | 799 | 3.5 |
| | Exports | 491 | 535 | 563 | 619 | 623 | 6.2 |
| CLOTHING (NACE 453-4) | Employment | 10,923 | 10,515 | 10,739 | 10,297 | 9,971 | -2.2 |
| | Number of enterprises | 248 | 248 | 248 | 248 | 248 | 0.0 |
| | Turnover | 303 | 287 | 293 | 269 | 267 | -3.0 |
| | Value added (f.c.) (*) | 114 | 107 | 110 | 103 | 106 | -1.7 |
| | Investment | 9 | 11 | 11 | 11 | 11 | 17.0 |
| | Imports | 312 | 347 | 377 | 413 | 433 | 8.6 |
| | Exports | 168 | 163 | 173 | 172 | 180 | 1.8 |

Notes:

Values: Mn ECU; Turnover & Value Added are in constant prices (1985=100)

(*): Data for enterprises with more than 20 employees only.

f.c. = at factor cost

NACE 43 includes the knitting industry

TABLE 13

# The structure of the textile & clothing industry 1988 - 1992    OETH

## Italy

| Industry | All enterprises | 1988 | 1989 | 1990 | 1991 | 1992 | AAR (%) |
|---|---|---|---|---|---|---|---|
| TEXTILES and CLOTHING (NACE 43+453-55) | Employment | 804,473 | 776,225 | 763,898 | 739,152 | 718,123 | -2.8 |
| | Number of enterprises | ‖ 49,827 | 55,524 | 55,424 | 55,172 | 53,940 | 2.1 |
| | Turnover | 53,771 | 58,716 | 58,348 | 58,535 | 60,074 | 2.9 |
| | Value added (f.c.) (*) | 10,372 | 10,547 | 10,587 | 10,631 | 10,746 | 0.9 |
| | Investment (*) | 1,801 | 1,775 | 1,721 | 1,704 | 1,479 | -4.7 |
| | Imports | 5,761 | 6,627 | 6,783 | 7,230 | 7,495 | 6.9 |
| | Exports | 13,474 | 15,154 | 16,324 | 16,506 | 16,718 | 5.6 |
| TEXTILES (NACE 43 + 455) | Employment | 475,813 | 476,849 | 469,911 | 463,889 | 447,208 | -1.5 |
| | Number of enterprises | 28,541 | 29,745 | 29,645 | 29,393 | 28,161 | -0.3 |
| | Turnover | 35,006 | 36,737 | 36,860 | 37,077 | 37,496 | 1.7 |
| | Value added (f.c.) (*) | 7,346 | 7,209 | 7,406 | 7,457 | 7,392 | 0.2 |
| | Investment (*) | 1,491 | 1,476 | 1,380 | 1,426 | 1,266 | -3.8 |
| | Imports | 4,725 | 5,406 | 5,413 | 5,350 | 5,210 | 2.7 |
| | Exports | 9,736 | 10,581 | 11,212 | 11,437 | 11,645 | 4.6 |
| CLOTHING (NACE 453-4) | Employment | 328,660 | 299,376 | 293,987 | 275,263 | 270,915 | -4.7 |
| | Number of enterprises | ‖ 21,286 | 25,779 | 25,779 | 25,779 | 25,779 | 21.1 |
| | Turnover | 18,765 | 21,979 | 21,488 | 21,458 | 22,578 | 5.0 |
| | Value added (f.c.) (*) | 3,026 | 3,338 | 3,181 | 3,174 | 3,354 | 2.8 |
| | Investment (*) | 310 | 299 | 341 | 278 | 213 | -7.8 |
| | Imports | 1,036 | 1,221 | 1,370 | 1,880 | 2,285 | 22.2 |
| | Exports | 3,738 | 4,573 | 5,112 | 5,069 | 5,073 | 8.3 |

Notes:
Values: Mn ECU; Turnover & Value Added are in constant prices (1985=100)
(*): Data for enterprises with more than 20 employees only.
f.c. = at factor cost
NACE 43 includes the knitting industry
‖  : Break in the data

TABLE 14

# The structure of the textile & clothing industry 1988 - 1992     OETH

## The Netherlands

| Industry | All enterprises | 1988 | 1989 | 1990 | 1991 | 1992 | AAR (%) |
|---|---|---|---|---|---|---|---|
| TEXTILES and CLOTHING (NACE 43+453-55) | Employment | 31,755 | 31,626 | 30,685 | 31,121 | 30,418 | -1.1 |
| | Number of enterprises | 569 | 593 | 577 | 581 | 581 | 0.7 |
| | Turnover | 2,641 | 2,716 | 2,739 | 2,829 | 2,743 | 1.0 |
| | Value added (f.c.) (*) | 785 | 819 | 848 | 832 | 773 | -0.3 |
| | Investment (*) | 115 | 139 | 138 | 134 | 134 | 5.8 |
| | Imports | 5,476 | 5,845 | 6,504 | 7,076 | 7,127 | 6.9 |
| | Exports | 3,253 | 3,616 | 3,940 | 4,180 | 4,239 | 6.9 |
| TEXTILES (NACE 43 + 455) | Employment | 23,005 | 23,323 | 22,504 | 23,082 | 22,623 | -0.4 |
| | Number of enterprises | 432 | 450 | 442 | 446 | 446 | 1.1 |
| | Turnover | 2,098 | 2,178 | 2,185 | 2,256 | 2,172 | 0.9 |
| | Value added (f.c.) (*) | 631 | 670 | 693 | 685 | 637 | 0.4 |
| | Investment (*) | 107 | 119 | 119 | 115 | 115 | 2.6 |
| | Imports | 3,436 | 3,618 | 3,985 | 4,325 | 4,409 | 6.5 |
| | Exports | 2,437 | 2,659 | 2,828 | 2,950 | 2,973 | 5.1 |
| CLOTHING (NACE 453-4) | Employment (*) | 8,750 | 8,303 | 8,181 | 8,039 | 7,795 | -2.8 |
| | Number of enterprises (*) | 137 | 143 | 135 | 135 | 135 | -0.6 |
| | Turnover (*) | 543 | 538 | 554 | 573 | 571 | 1.3 |
| | Value added (f.c.) (*) | 154 | 149 | 155 | 147 | 136 | -3.0 |
| | Investment (*) | 8 | 20 | 19 | 19 | 19 | 72.5 |
| | Imports | 2,040 | 2,227 | 2,519 | 2,751 | 2,718 | 7.6 |
| | Exports | 816 | 957 | 1,112 | 1,230 | 1,266 | 11.8 |

Notes:
Values: Mn ECU; Turnover & Value Added are in constant prices (1985=100)
(*): Data for enterprises with more than 20 employees only.
f.c. = at factor cost
NACE 43 includes the knitting industry

TABLE 15

# The structure of the textile & clothing industry 1988 - 1992    OETH

## Portugal

| Industry | All enterprises | 1988 | 1989 | 1990 | 1991 | 1992 | AAR (%) |
|---|---|---|---|---|---|---|---|
| TEXTILES and CLOTHING (NACE 43+453-55) | Employment | 289,179 | 307,202 | 306,151 | 290,671 | 263,833 | -2.1 |
| | Number of enterprises | 9,724 | 10,084 | 10,881 | 10,574 | 10,508 | 2.0 |
| | Turnover (**) | 4,813 | 4,006 | 4,242 | 4,182 | 4,062 | -3.8 |
| | Value added (m.p.) (*) | 777 | 729 | 768 | 767 | 723 | -1.7 |
| | Investment | 267 | 290 | 290 | 290 | 290 | 8.6 |
| | Imports | 995 | 1,189 | 1,500 | 1,735 | 1,899 | 17.7 |
| | Exports | 2,819 | 3,329 | 3,775 | 3,954 | 4,082 | 9.9 |
| TEXTILES (NACE 43 + 455) | Employment | 174,415 | 171,629 | 166,215 | 155,040 | 136,311 | -5.9 |
| | Number of enterprises | 3,701 | 3,779 | 4,576 | 4,269 | 4,203 | 3.7 |
| | Turnover (**) | 3,133 | 2,869 | 3,071 | 3,005 | 2,884 | -0.9 |
| | Value added (m.p.) (*) | 596 | 547 | 587 | 582 | 534 | -0.4 |
| | Investment | 236 | 255 | 255 | 255 | 255 | 8.1 |
| | Imports | 912 | 1,075 | 1,333 | 1,493 | 1,590 | 15.1 |
| | Exports | 1,887 | 2,189 | 2,434 | 2,548 | 2,677 | 9.2 |
| CLOTHING (NACE 453-4) | Employment | 114,764 | 135,573 | 139,936 | 135,631 | 127,522 | 3.1 |
| | Number of enterprises | 6,023 | 6,305 | 6,305 | 6,305 | 6,305 | 4.7 |
| | Turnover (**) | 1,680 | 1,137 | 1,171 | 1,177 | 1,178 | -7.2 |
| | Value added (m.p.) (*) | 181 | 182 | 181 | 185 | 189 | 1.1 |
| | Investment | 31 | 35 | 35 | 35 | 35 | 12.9 |
| | Imports | 83 | 114 | 167 | 242 | 309 | 39.1 |
| | Exports | 932 | 1,140 | 1,341 | 1,406 | 1,405 | 11.2 |

Notes:

Values: Mn ECU; Turnover & Value Added are in constant prices (1985=100)

(*): Data for enterprises with more than 20 employees only.

(**): Turnover is based on data for production

m.p. = at market price; Value added data for textiles is based on NACE 43

TABLE 16

# The structure of the textile & clothing industry 1988 - 1992     OETH

## United Kingdom

| Industry | All enterprises | 1988 | 1989 | 1990 | 1991 | 1992 | AAR (%) |
|---|---|---|---|---|---|---|---|
| TEXTILES and CLOTHING (NACE 43+453-55) | Employment | 493,999 | 470,174 | 434,718 | 395,902 | 369,882 | -7.0 |
| | Number of enterprises | 15,640 | 15,649 | 14,628 | 13,778 | 13,778 | -4.1 |
| | Turnover | 20,711 | 20,321 | 19,297 | 18,434 | 18,501 | -2.8 |
| | Value added (f.c.) (*) | 7,317 | 7,015 | 6,881 | 6,415 | 6,435 | -3.1 |
| | Investment (*) | 877 | 798 | 658 | 507 | 507 | -16.5 |
| | Imports | 9,730 | 10,334 | 10,402 | 10,568 | 10,723 | 2.5 |
| | Exports | 4,794 | 5,044 | 5,314 | 5,507 | 5,637 | 4.1 |
| TEXTILES (NACE 43 + 455) | Employment | 260,370 | 251,258 | 230,013 | 213,322 | 201,995 | -6.1 |
| | Number of enterprises | 6,542 | 6,722 | 6,307 | 5,989 | 5,989 | -2.8 |
| | Turnover | 13,660 | 13,345 | 12,567 | 12,049 | 11,996 | -3.2 |
| | Value added (f.c.) (*) | 4,687 | 4,472 | 4,305 | 4,146 | 4,136 | -3.1 |
| | Investment (*) | 669 | 592 | 470 | 396 | 396 | -16.0 |
| | Imports | 6,914 | 7,151 | 7,136 | 7,181 | 7,347 | 1.5 |
| | Exports | 3,648 | 3,883 | 3,968 | 3,968 | 4,066 | 2.8 |
| CLOTHING (NACE 453-4) | Employment | 233,629 | 218,916 | 204,705 | 182,580 | 167,887 | -7.9 |
| | Number of enterprises | 9,098 | 8,927 | 8,321 | 7,789 | 7,789 | -5.0 |
| | Turnover | 7,051 | 6,976 | 6,730 | 6,385 | 6,505 | -2.0 |
| | Value added (f.c.) (*) | 2,630 | 2,543 | 2,576 | 2,269 | 2,299 | -3.2 |
| | Investment (*) | 208 | 206 | 188 | 111 | 111 | -16.9 |
| | Imports | 2,816 | 3,183 | 3,266 | 3,387 | 3,376 | 4.8 |
| | Exports | 1,146 | 1,161 | 1,346 | 1,539 | 1,571 | 8.4 |

Notes:
Values: Mn ECU; Turnover & Value Added are in constant prices (1985=100)
(*): Data for enterprises with more than 20 employees only.
f.c. = at factor cost
NACE 43 includes the knitting industry

## III. METHODOLOGY USED

The OETH's role is the collection and analysis of statistical information relating to the sector of textiles and clothing. It has assembled information on aspects of the industry such as the recent fluctuations within the sector, its structure and its social and technological aspects.

Within this framework, the need for more reliable structural data proved to be urgent. The OETH thus decided to devote a major part of its programme of activities to this matter and, on 19 December 1991, it set up a working group consisting of experts from Eurostat[1], DEBA[2], DG III[3], Comitextil[4], ECLA[5] and CIRFS[6].

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[1]   Eurostat: Statistical Office of the European Community

[2]   DEBA: Data for European Business Analysis

[3]   DG III: Directorate General Industrial Affairs of the Commission of the European Community

[4]   COMITEXTIL: Coordination Committee for the Textile Industries in the European Economic Community

[5]   ECLA: European Clothing Association

[6]   CIRFS: International Rayon and Synthetic Fibres Committee

# 1. Objectives and methodology of the Working Group on Structural data

The general approach of the OETH is to create a statistical information base in the first instance. Following that, more specific studies will be undertaken.

As far as the collection and improvement of data is concerned, this programme has the following general outline:

- making an inventory of sources and of existing statistics, filling the gaps;

- comparing professional with official statistics, and analysing the differences;

- launching of surveys to correct observed data;

- deciding on methods of estimating missing data in order to obtain complete data;

- generating new information on specific topics;

- creating an appropriate data bank with easy access.

Publications will be prepared on a regular basis, giving both basic information and information on specific topics. This will be done in close collaboration with Eurostat, DEBA and professional associations.

The OETH's working programme on structural data covers five areas of work:

- basic structural data;

- regional analysis;

- cost structure;

- social statistics;

- strategic information.

The Working Group's activities have concentrated mainly on basic structural data, and therefore this first publication deals exclusively with this area.

## 2. Background to the basic structural data

2.1 The Working Group adopted a method of working based on a framework (priorities, options), the compilation of an inventory of available sources, and on data comparison.

Initially, the exercise was carried out on data for 1988 (sources: annual and five-yearly surveys (Eurostat), SOCI[1], and professional associations' reports for NACE 43 + 455 and 453 + 454, in accordance with the Community Nomenclature adopted in 1970).

Secondly, an estimation for 1989 and 1990 was carried out in order to enable the OETH to prepare an interim report sent out in October 1992 to professional associations, National Statistical Offices and Ministries of Industry.

After contributions and criticisms relating to this report had been analysed, a historical series was generated, starting in 1988, including a number of sub-sectors (NACE 3-digit).

2.2 The following steps were taken by the Working Group:

a) Establishment of a **framework.**

The **definitions** of each variable and the correspondence between NACE 70 and NACE Rev. 1 were provided by Eurostat (Annexes 2 and 3).

For this purpose the Working Group decided to apply the coverage adopted in NACE Rev.1 for textiles, by combining the existing NACE 43 and 455.

In addition, COMITEXTIL prepared a methodological document concerning the data sent to them by their members.

b) **Inventory** of available data

The Working Group made an inventory of structural data. This, together with the EC surveys of company structure and activity, and the data from professional associations, PANORAMA and the DEBA data bank (based on the annual survey), constitutes the essential statistical information base.

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[1]     SOCI: data bank on social statistics, DG V

c)   **Comparison of sources**

Eurostat has made recommendations derived from the results of a comparison of sources. Using these recommendations, and comments made on the interim report, the OETH decided on the data which seemed to it to be the most reliable in terms of cover, definition and estimating method.

## 2.3   Procedure adopted

In the course of this work it clearly emerged that there could not be a **single source** which could supply the desired data for all of the sectors of activity, countries and variables.

The question was to decide what to draw from the various sources. In order to do this, the Working Group first of all determined the **criteria** to be met in choosing between sources. On the basis of these criteria, the data were selected.

a)   **Desired criteria for data-selection**

Three criteria were chosen, namely:

-   **intrinsic** quality

    *   correspondence between what the data measures and what the user requires;

    *   precision (do the data measure what they are intended to measure ?);

-   **consistency** with other series

    *   can the data be compared with those for other countries, industries and variables ?

-   the most **recent** data available.

b)   The **concept** of the organization of data by the OETH was based on the idea of an industry, in the sense of 'a group of companies having in common a specific main activity'. This is the concept of a sector contained in the NACE classification.

c) An examination of the main sources of data reveals the following strengths and weaknesses:

- **Eurostat data**

  Eurostat has two sources of structural data.

  The principal source of data is the **annual and five-yearly industrial surveys.**

  Their strengths reside in the comparability and relatively complementary nature of the data. During the last two decades a major achievement has been the harmonisation of data between Member States.

  Their weaknesses are due to a generally insufficient coverage (enterprises with less than 20 employees are not regularly covered), and to gaps which sometimes arise from the need for confidentiality. Moreover, recent data are often not available. This is why estimates are regularly made in the DEBA data bank.

  The second source of data relates to **small and medium-sized enterprises.** These surveys provide information on the distribution of activity by size of company. The data are available at a two-digit NACE level (sometimes also at a three-digit NACE level) for recent years, but for a limited number of variables.

  Their main usefulness, together with the data from the five-yearly survey, is to provide scope for estimating the number of companies, employment and turnover for enterprises employing less than 20 people.

- **Information from professional associations**

  **Comitextil** has submitted a detailed note on the data and sources available within the textile trade, together with an analysis of the methodology adopted (see Annex 4).

  The strength of these data lies in their detailed coverage (information at NACE three-digit or four-digit level), but gaps remain for certain Member States and for certain variables.

  In most cases the accuracy of the data seems satisfactory. However they do not always correspond to the definitions of the variables adopted.

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The data provided by ECLA relate to the main variables but at a more aggregated level than those in the upstream sectors.

The accuracy of the data seems generally satisfactory where enterprises employ more than 20 persons, but this is not the case for smaller firms.

d)      **Strategy Adopted**

The **1988** data (the year of the last available five-yearly survey) were analysed first in order to decide on the sources to be used.

It was agreed that **the data from the annual Eurostat survey should be retained automatically where the differences between these data and those from the professional associations were not greater than 5% at the national level.**

In the **other instances,** the trade data were compared with **new estimates** made by DEBA and essentially based on the SMEs (small and medium-sized enterprises) and five-yearly surveys (this applied especially to the clothing sector), data from the professional associations and the national ministries as well.

An estimation exercise was made in a similar manner for **1988 to 1992,** on the basis of the 1988 results adopted by the OETH, together with all other factual information made available in the context of the interim report.

# IV. USERS' NOTES

1. ...          data not available

   blank       data not available for the given year


2. All references to NACE refer to NACE 1970.


## 3. BRANCH DEFINITIONS

| | |
|---|---|
| NACE 43 | Textile industry = NACE 431, 432, 433, 434, 435, 436, 437, 438, 439 |
| NACE 431 | Wool industry |
| NACE 432 | Cotton industry |
| NACE 433 | Silk industry |
| NACE 434 | Flax, hemp and ramie |
| NACE 435 | Jute industry |
| NACE 436 | Knitting industry |
| NACE 437 | Textile finishing |
| NACE 438 | Carpets, linoleum and floor coverings |
| NACE 439 | Miscellaneous textile industries |
| NACE 453 | Ready-made clothing |
| NACE 454 | Bespoke tailoring |
| NACE 455 | Household textiles |
| NACE 456 | Furs and fur goods |


## 4. METHODOLOGICAL NOTES

NACE 43 (Textile industry) includes the knitting industry (NACE 436).

Values are in constant prices (1985 = 100). Import and export data are in current prices.

Values of exports and imports for EC-total are for extra-EC trade only. For member states extra- and intra-EC trade are included.

Foreign trade data, by NACE, include imports and exports of raw materials.

Where figures for individual countries are not available, the EC totals have been adjusted so as to be consistent from year to year.


## 5. SOURCES

**Public sources**

1. EUROSTAT
2. Relevant Ministries in member states
3. National Statistical Offices

**Private sources**

1. National Associations
2. Comitextil
3. DEBA (Data for European Business Analysis)
4. ECLA
5. OETH

The OETH (L'Observatoire Européen du Textile et de l'Habillement) was founded in 1991. It is an independent non-profit making organisation, incorporated under Belgian law (ASBL). The OETH's aim is to increase objective knowledge of the economic conditions of the textile and clothing sectors, especially of EC countries. It conducts research by its own staff and in collaboration with DG III of the European Commission, Eurostat and its Working Groups.

The OETH is entirely financed by the European Commission.

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Director General        Ms Michèle Ledic

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OETH PUBLICATIONS

OETH QUARTERLY BULLETIN

| | | | |
|---|---|---|---|
| N° 0, Volume I | - | March | 1992 |
| N° 1, Volume I | - | July | 1992 |
| N° 2, Volume I | - | October | 1992 |
| N° 1, Volume II | - | January | 1993 |
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OETH MONTHLY REPORT

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| September | 1992 | January | 1993 |
| October | 1992 | February | 1993 |
| November | 1992 | March | 1993 |
| December | 1992 | April/May | 1993 |

OETH STUDIES

The EC Textile and Clothing Industry 1990/1991
- A Factual Report -
(English, French, German) - June 1992

The EC Textile and Clothing Industry 1991/1992
- A Factual Report -
(English, French, German, Italian) - April 1993

Figures and Facts in the World of Textiles
Basic Structural Data on the EC Textile and Clothing Industry, 1988 - 1992 -
Part One
(English, French) - July 1993
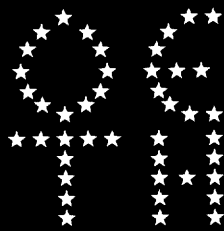
Rue Belliard, 197

Bte 9

B-1040 Bruxelles

Tél: (32-2) 230 32 82

Fax Ø: (32-2) 230 43 34