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REPORT ON

THE TEXTILE AND CLOTHING INDUSTRY

(presented by the Commission)

CONTENTS

1B

REPORT ON THE TEXTILE AND CLOTHING INDUSTRY

INTRODUCTION

Recent trends in the Community's textile and clothing industry have been disturbing; the rapid deterioration in its trade balance has led to questions being asked about its medium and long-term future.

The report shows that the structural changes in the textile and clothing industry are speeding up, suggesting the opportunity for a systematic analysis of all fields where the Community can act positively to facilitate these changes. The most important of these fields are briefly mentioned at the end of the report. In the near future the Commission's intention is to build up its analytical base which could then eventually be used to formulate proposals.

PART I : LONGER-TERM TRENDS

The long-term trends of most relevance to the Community's textile and clothing industry are described in the detailed report which was sent to the Council in July 1985 with the Commission Communication to the Council on the renewal of the Arrangement regarding International Trade in Textiles (MFA) (SEC(85) 1027 of 8 July 1985).

These trends are reviewed in Part I of this report and provide a background for discussion of more recent trends in Part II.

Important points

1. The first phenomenon of note is the low growth in domestic demand for textiles and clothing within the Community over the last 15 years.

   The lack of growth in real income since the oil shock has altered consumer behaviour. Consumption of textile and clothing products had been keeping pace with general consumption but since 1973 has risen more slowly. The dramatic rise in consumption in 1986 and 1987 is deceptive; in actual fact the increase was only 15% from 1976 to 1987 - both these being years when there was an upswing in the textile and clothing industry.

   The same phenomenon has been observed in other industrialised countries in contrast to the rest of the world where consumption is continuing to rise more rapidly. This is gradually changing the geographical distribution of markets. In 1973 industrialised countries with market economies still accounted for 50% of final consumption of textile fibres throughout the world. If the present trend continues, this share will have dropped to only 35% by the year 2000 by which time consumption will have doubled.

2. It is, however, not low growth in consumption but a veritable accentuation of competition from less developed countries which has been a dominant feature of the recent history of the Community textile and clothing industry. In 1973 imports accounted for 28% of final fibre consumption rising to 33% in 1976 and, despite the introduction of a whole series of

agreements and arrangements with exporting countries, in 1985 stood at 45% for the Community of Ten. The penetration rate for imports for the Community of Twelve was 38% in 1985, 42% in 1986 and 47% in 1987.

The origin of this rapid rise in textile and clothing imports lies in the structure of production costs and the cost of factors of production.

Some 20 years ago both the textile industry in the strict sense of the word (spinning, weaving and finishing) and the clothing industry were highly labour-intensive.

The increase in imports has mainly concerned raw or simply dyed cotton yarn and cloth, in other words, simple products accessible to any industrialising country which could be largely produced by an unskilled workforce. This was a production sector where less developed countries were more easily able to exploit their cost advantage in terms of labour costs. Some of these countries have also made the development of textile products for export part of their industrial and trading strategies. These include South East Asia and state trading countries.

The rise in imports of clothing products was by and large a later phenomenon and was - to a great extent - prompted from within the Community, from two sources. On the one hand, large distributors have been placing a growing number of orders in low-wage countries which they had hitherto placed in the Community.

On the other hand, there is an increasing trend for Community manufacturers to relocate some production of certain products or even all production of part of their range to low-wage countries. This started earlier and has become more extensive in Member States where distribution is more centralised and wages higher.

Low wage costs do not, however, give an absolute advantage to textile and clothing manufacturers in less developed industrialised countries.

Encouraging signs

3. There is a whole range of factors which have helped to maintain or re-establish the competitiveness of industrialised countries, particularly in the Community, in recent years. These include technical progress, creativity, improved management, etc. For example:

   (a) significant technical progress has been made over the last 15 years and this has brought about a gradual change in the structure of production costs.

   There has been massive investment to reduce labour costs at various stages in production in new processes, the automation of a number of operations, the use of electronics for instantaneous quality control, the regulation or execution of certain production operations and the development of increasingly complex design, production and computer-aided management systems;

   (b) the use of electronics can improve quality whilst cutting labour costs as well as drastically cutting lead times both for designs and models and between stages in the production chain.

   This trend has been particularly marked in the initial production stages of spinning, weaving, the manufacture of cloths and fully fashioned knitted fabrics, dyeing and printing. As the share of production facing comparable costs for raw materials and semi-finished products (depending on the production stages) and for factors other than labour costs increases from year to year, producers in the industrialised countries will be able to regain their lost competitiveness vis-à-vis low-wage countries. At the other end of the chain, making-up and stitching of garments and other textile products are still very labour-intensive, although robotics is being introduced here and there for some simple products and parts of garments;

(c) this gives low-wage countries a cost advantage which is making the production in industrialised countries of articles which less developed countries can produce under comparable conditions less competitive.

The progress made in computer-aided making-up of models and in the automation of cutting is evidence that the industry in the industrialised countries will be able to regain its competitiveness for a wide range of products once automation has been successfully introduced in making-up and cutting or new techniques introduced producing similar results. This does, however, still seem a long way off.

Highly capital-intensive production techniques developed for the textile industry proper may also be used in a growing number of industrialising countries, although they may not necessarily give them a comparable advantage;

(d) another way in which Community industry has responded to the challenge posed by the arrival on the market of manufacturers with a workforce receiving an hourly wage which is often a quarter or tenth of European rates is to introduce a creativity drive.

European consumers will readily pay more for a product they like if it is of high quality , original or new;

(e) the cost of designing (composition, colour, design, model) these types of products, which are obviously produced in smaller series, is higher and can easily represent 10% of overall production costs. Such products are also more expensive to actually produce as more sophisticated equipment and more highly skilled labour are required to ensure flexibility in the production process.

The higher costs of producing fashion products compared with ordinary products is not necessarily a disadvantage since competitiors who can offer similar products are also in the same position.

Because of the changing nature of fashion, market presence is a must in terms of design. On the production side, communication and transport costs, which can be considerable when deadlines are short, can be avoided by having design and markets close at hand;

(f) such proximity is, however, not an absolute advantage. As long as the final stages in the production of clothing and other textile products are highly labour-intensive, it may be cheaper to manufacture certain fashion articles in low-cost countries if they have sufficiently skilled labour and sophisticated machinery.

There is even more incentive to make use of this possibility as the creative advantage is often reduced by the lack of adequate measures to protect against unauthorised reproduction of designs and models, which is becoming increasingly easier and faster with modern technology.

The Community is still an important exporter

4. Despite the considerable increase in imports, the Community remains an important exporter of textile and clothing products; in 1987 the value of its exports was 84% of that of its imports.

But, as shown by the following table, this average ratio covers very different situations according to the partner countries and to the products concerned:

STRUCTURE OF EXPORTS TO OUTSIDE THE COMMUNITY

(a) Trade flow breakdown (%)

(b) As percentage of imports (in brackets)

	All textiles	Non MFA products	MFA Textiles	MFA Clothing
From outside the EEC	100 (84)	15 (176)	52 (117)	33 (51)
Countries not covered by the textile policy (1)	66 (216)	10 (256)	29 (152)	27 (360)
Countries covered by the textile policy (1)	34 (38)	5	23 (90)	6 (11)

5. The industrialised countries not covered by the textile trade policy are the most important markets for the whole sector and in particular for MFA clothing; in trade with these countries exports are far greater than imports.

For MFA and non-MFA products exports to countries covered by the textile trade policy are of the same order of magnitude as imports; on the contrary, for the same countries imports of MFA clothing products are much greater than exports.

This leads to the conclusion that the Community's textile industry is keeping its competitiveness vis-a-vis the other industrialised countries in particular in the clothing sector; in textiles, where the products are more similar and the margins narrower, the depreciation of the dollar played a rather more negative role.

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(1) For the list of these countries see Annex XI.

The importance of trade between industrialised countries corresponds also to a certain extent to the degree of specialisation by firms as shown in intra-Community trade where the tonnage traded corresponds to 80% of the weight of finished products from the textile and clothing industry.

6. In tonnes, exports represent a still (but rapidly increasing) minor part of total clothing and knitwear production (roughly 7% in 1977 and 13% in 1987); for textiles, exports represent a substantial but relatively stable part of total production (roughly 40% in 1977 and 42% in 1987).[1]

The relative stability and even the slight increase in the export volumes (see also Annexes III and IV) despite the competition from less-developed countries, testifies to the fact that the Community's exports cover different segments from those where countries covered by the trade textile policy are operating. However, export growth possibilities are limited by the low increase in demand in the less-developed countries in those sectors where the Community's production is still competitive.

Macro-economic and structural factors

7. Despite technical progress and the advance in creativity, low growth of consumption and the pressure of outside competition have over the last 15 years meant a stagnation in the volume of textile production and a drop in clothing production in the Community (see Annexes XII and XIII).

Industrial restructuring and the introduction of modern technologies have also led to a proportionally larger contraction in the workforce than in production. Even if the statistics do not entirely represent the true picture (mainly because of the difficulty of including small firms and home workers), it can be ascertained that between 1976 and

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(1) 1977 and 1987 data for 9 Member States. In 1987, for 12 Member States, exports amount to 14% of the production in clothing and 42% in textiles.

1986 the workforce in the textile and clothing industry in the then Member States was cut by about 30% - a trend which is continuing. (See Annexes V to X).

Community textiles policy has given the industry a little more time to adapt its structures by controlling the rise in imports but it has not reduced the need for such adjustments.

Competition between Community producers has also been responsible for change both in segments of the market where production is still largely concentrated in the industrialised countries and in other segments with use being made of outward processing and outwork in low-wage countries.

Firms within the Community textile and clothing industry which are leading the way in adapting to the new conditions of competition are very different from those which were typical of the industry only 20 years ago.

8. With the introduction of modern technology in the textile industry (in the narrow sense: spinning, weaving, dyeing and printing) companies have, in a few years, amassed fixed assets which, in terms of each person employed, are already or are becoming comparable to that of the so called heavy industries. It is essential that there is systematic financial management and tight control of the factors of production and specialists in these areas are required at management level.

Capital investment in production has also been observed in the clothing industry, particularly in the knitting sector which uses yarn directly and increasingly in the making-up of woven fabrics, together with increased use of electronics.

Access to the funds needed for advanced technology-based strategies and the resultant management skills required pose a real challenge to small and medium-sized firms which still account for a large section of the production and the workforce in the clothing industry, particularly making-up.

The creativity push has also changed the structure of firms. Not only do new products have to be found (which has repercussions upstream as far back as spinning) but commercial services also have to be developed (for market studies and attraction of potential buyers).

9. These changes in the textile and clothing industry started earlier in Member States where the pressure was greater owing to higher wage costs. They have started later and are less advanced in the new Member states where lower wage costs and commercial policy options have imposed fewer constraints.

Accession to the Community has meant that in these countries the same techniques as used by the other Member States will have to be employed in all production processes where highly capital-intensive processes are a pre-requisite for reducing production costs.

Mainly as a result of competition from non-Community countries, there is similar pressure to push the use of advanced technology as far as possible in high labour intensive production (knitted and woven fabrics, household linen, etc.) even if the low level of wages still gives manufacturers in some Member States having joined recently, a cost advantage over manufacturers in other Member States.

The introduction of advanced technology must be accompanied by a systematic creativity drive. It has been seen in the Member States which have led the way here that, in production where labour still accounts for a large proportion of value added, as real wages have risen, firms which do not provide a service or a product which is different from those offered by manufacturers in countries with lower wage costs inside or outside the Community have gone under.

PART II : RECENT TRENDS

Disturbing signs

1. After the respite of the early 1980s, a recent general trend in the textile and clothing industry in the Community has been the rapid expansion of imports from the countries covered by the textiles policy, substantially increasing their share of Community consumption (cf. Annex I).

2. Technically this expansion was induced by the large proportion of quotas unused in the past and their level (cf. Annex II):

   - countries with MFA-type agreements with the Community used only 66% of their quotas for all textiles and clothing in 1984, but 81% in 1987. For clothing alone, the quota utilisation rose from 70% in 1984 to 77% in 1986 and 89% in 1987. This fuller utilisation of the quotas also boosted imports in the quota-free categories, which accounted for 21% of the Community's imports from the MFA countries in 1985 and 42% in 1987;

   - countries with preferential arrangements for exporting textiles to the Community - which currently supply 21% of the Community's imports from countries covered by the textiles policy - usually exported the full quantities agreed for the product categories under limitation, though 58% of their exports came from quota-free categories.

   Several factors combined to produce this rapid import growth:

   (i) the vigorous cyclical upswing in demand for textiles and clothing in the Community in 1986 and 1987;

   (ii) the economic and technical progress in the industry in the exporting countries, which has enabled them to penetrate new sectors of the market;

(iii) exporters' greater interest in the European market, stimulated by the USA's more restrictive trade policy and the falling dollar;

(iv) regain of competitiveness by American textile products because of the depreciation of the dollar;

(v) the declining value of the currencies of many exporting countries, some of which have been falling more steeply than the dollar.

3. One particularly noteworthy phenomenon is the growth in clothing imports in 1986, 1987 and, as far as can be seen, in 1988.

It implies that there are fewer and fewer market sectors where production in the Community is the only answer.

Over the last few years the market share taken by fashion clothing has risen substantially, however it is hard to quantify and fashions have been changing faster and faster. The fact that imports have grown rapidly nevertheless implies that more and more clothesmakers in the exporting countries now have the technology to complete a broader range of operations relatively fast.

This is a tempting opportunity, not only for primarily trading companies which previously placed their orders in the Community, but also for industrial undertakings in difficulty because of their high wage costs and the invasion of their market by products from countries paying far lower wages.

<u>The phenomenon of the resiting of production</u>

4. The resultant resiting of part of production by industrial undertakings, started very early in Member States where the workforce was attracted to higher-paid industries.

This phenomenon can consist of getting certain articles produced or partly-produced in a low-wage country (outward processing or TPP). The latter operation mostly consists of making-up from cloth or ready cut pieces supplied by the donor country which takes back the clothes. This outward processing trade is often only declared as such when it is necessary to avoid customs duties or quantitative restraints on imports.

This resiting developed according to a number of factors such as geographical position, wage levels, union attitudes, commercial strategies. Firm size also played a part: it is harder for small firms to raise the human resources and capital needed to organise such resiting and cover the risks entailed. This has led to differing degrees of development in different countries.

5. Today the phenomenon has reached even countries where not long ago production costs were competitive.

Such a resiting strategy is virtually impossible for firms limited to handling orders placed by traders or other industrial undertakings. Firms like this can survive only as long as no comparable service is available in a country paying lower wages. Consequently, the nature of the production helps to explain the rapid disappearance of whole branches of the clothing industry following wage increases in certain countries.

The Community producers fastest to farm out to other countries some of their production operations or the manufacture of part of their range in order to lower their average production costs have remained competitive. Many have even increased their market share.

Needless to say, this lead tends to be followed by other producers wanting to maintain or increase their market share.

This was borne out by indications received in the course of managing the trade policy to the effect that in one Member State after another the industry itself has been calling for no, or at least relatively high, limits on imports of certain clothing products to allow it to carry through the import plans needed to balance its costs and sustain local production.

6. The sustained growth in textile imports (in the strictest sense) also raises questions.

It is evident that in the textile and clothing sectors alike, production structures differ from one Member State to another. Firms' interests diverge, depending on their specialities. This in turn produces differing assessments on the part of the trade policy authorities as to whether or not to impose fresh import limits and, if so, the level to be set. In effect, increasing imports to overcome a firm's current micro-economic problem inevitably encourages other producers at all stages of production to import more or to transfer production to another country.

Such a climate affects output and employment in most Member States and can only make adaption more urgent for those undertakings in the Member States slowest to start modernisation.

7. Paradoxically, the Community textile industry faces stiffer competition on not only its home market but also its traditional export markets, even in products which have switched to highly capital-intensive processes where the Community industry attains the lowest total costs despite its high wages.

Moreover, the same phenomenon is repeated in the upstream branches of the textile and clothing industry, in the synthetic fibres sector, which is the classic example of capital-intensive production.

The only possible explanation is the government support granted by the exporting countries to their industries, particularly to production bound for export.

Distorting factors

8. This support takes various forms, often concurrently:

- investment aid: this aid often gives priority to, or is reserved exclusively for, products for export; usually less modern plant is used for products for the home market which are uncompetitive internationally;

- direct export aid;

- access to raw materials at below world market prices: this aid mechanism is not always easy to detect; in Turkey, for example, the aid for cotton yarn spinning takes the form of a one-year deferral of payment, but this advantage is magnified by the sharp annual depreciation of the Turkish lira (by between 30% and 50% or more in recent years);

- protection of the home market: generally, the tariff and/or non-tariff barriers placed in the way of imports of competing products into developing and newly industrialised countries with their own local producers prove virtually insurmountable for foreign producers.

9. Given the impact of these policies on the structure of production costs in the textile industry, there is a genuine danger that these various forms of support could attract the factors of production in rarest supply in these countries (capital and skilled labour) to the textile industry, beyond all proportion to the comparative advantage.

These policies are making a growing range of imported products at various stages of production extremely competitive in value for money terms. This places the less-modernised Community undertakings in a particularly difficult position. Within the industry it increases conflicts of interest over trade policy, both between successive stages of production (with each stage wishing to increase its imports) and between undertakings at the same stage of production (some of whom are beginning to market imported products to complete their range).

PART III: IMPLICATIONS FOR THE COMMUNITY'S POLICIES

Trade Policy

1. The general guidelines laid down by the Council on 22 July 1985, the subsequent statement at the GATT Textiles Committee and the Directives adopted by the Council on 11 March 1986 for the negotiations to renew the MFA and the associated bilateral agreements explicitly expressed a more flexible policy on trade in textiles and clothing. Traders and the industry are beginning to grasp this message more clearly and to incorporate it into their strategy and the recent developments in the textile and clothing industry show that the fundamental changes reported in 1985 are gaining pace.

   The clothing industry remains highly labour-intensive. Although design and cutting have been computerised and automated, little has changed in the making-up and stitching stages. The picture is much the same with household linen.

2. Until the technological breakthrough is made to automate making-up and finishing, external pressure and competition between European firms are bound to exert pressure to transfer a growing proportion of production to other countries.

   Taking into account the speed with which this phenomenon is spreading, it cannot be ruled out that this process could continue almost as fast as in the last two years, especially considering that at least two-thirds of the cheap clothing imported into the Community comes from countries which have attained a high level of industrial development.

   In the short term, one of the main difficulties for a firm wanting to resite production is either finding a partner capable of providing a quality product on time or being able to set-up its own production facilities.

The textile industry in the strict sense (i.e. spinning, weaving, cloth or fully fashioned knitted fabric production, dyeing and printing) is becoming increasingly capital intensive with the result that the cost advantage stemming from low wages is no longer the decisive factor for a growing range of products.

3. However, this progress with production processes and product innovation cannot arrest the decline of textile production in Europe while production of clothing and household linen - its principal final products - is switched to countries with inaccessible markets and the textile exporting countries' policies allow their firms not only to make similar investments with no thought for the comparative advantage and even, in certain cases, to export products at below cost price to the Community and its traditional, still considerable, export markets.

This explains the importance which the Community has been attaching, in the Uruguay Round, to the linkage between gradually returning textiles and clothing to the normal GATT rules and reinforcing these rules, which means bringing them into line with the new conditions of international competition created by the arrival of a growing number of countries to a significant level of industrial development.

Worldwide, comparative advantage demands that these countries should join the open market system without further delay and accept constraints similar to those governing relations between countries with a longer history of industrialisation.

4. Significant progress in opening up the markets of countries which have attained a certain level of industrial development and in encouraging them to accept the same constraints as the longer-standing industrialised countries, particularly on access to raw materials, State aid, trading practices and intellectual property rights (combined with greater action by the Community to uphold these constraints) should allow phasing-out of quantitative restrictions on imports, starting with the highly capital-intensive products , for which the situation has changed radically since the adoption of the MFA.

The paradox with the current situation is that if there is any delay in this extension of the scope of the GATT rules, there could be difficulty not only in maintaining a large proportion of the Community's labour-intensive production but also in the sectors which have adjusted most successfully, i.e. those manufacturing the products in which the established industrialised countries hold the clearest comparative advantage.

5. Adoption of more restrictive policies on textile and clothing imports by other industrialised countries could only heighten this risk.

Before starting to dismantle quantitative restrictions it will be necessary to identify more precisely the possibilities and restraints which can exist for different types of production, so that any proposed solutions are better suited both to the common interest and to the industry itself.

In this context the interdependence between succeeding stages and within the same stages of production should be clarified as well as an assessment made of what the possibilities of access to new external markets could mean for production.

Realisation of the Internal Market

6. Textiles and clothing is a sector where trading is highly developed[(1)] and where the effects of non-tariff barriers on price levels and product distribution are limited. The existence of internal border controls in the Community has, however, indirectly discouraged the development of transnational buying and distribution.

The probable effects of the completion of the Internal Market on the future development of the distribution of consumer goods (stimulation of the development of large distributors and mail order sales in countries

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[(1)] Annexe XIV suggests that intra-community trade in textiles and clothing accounts for a substantial part of the production and largely exceeds trade with third countries.

lacking these facilities, centralised purchasing by groups covering several Member States) could consequently have a non-negligible effect on the development and source of the supply.

A real Single Market cannot be achieved without abolishing the principle of regional quotas; products accepted in one Member State should be able to circulate freely in the rest of the Community.

Abolishing regional quotas implies having to make do without recourse to Article 115 of the Treaty. It is difficult to quantify the effect that this will have on the growth of trade between Member States or to predict exactly the direction of these tradeflows. Will trade flows go to those countries which usually are big importers from third countries, or will those countries which up to now have had low import quotas become the main target? One thing is highly likely: the scenario outlined above can change the form of competition both internally and externally.

7. The completion of the internal market will be accompanied by a strengthening of competition policy. This is the best way to guarantee that European firms remain competitive in international markets.

The Commission must ensure coordination between public financial aid, both at national and Community level, and the various internal and external objectives of the Community. In particular, it will continue to strictly vet state aids. An inventory of aid given to the textile and clothing sector will periodically be drawn up as has already been done in the past. The Community expects its GATT partners to be as rigorous in stamping-out unfair subsidies and non-commercial benefits

Research and development technology

8. The maintenance of an important production base for textiles and clothing production in the industrialised countries depends on being able to develop highly capital-intensive manufacturing processes with a minimum of unskilled labour.

Significant progress towards this end has already been made, particularly in the first stages of the production process.

Although progress is being made or foreseen for the other stages, there remains an important part of the production chain for which the automisation of the production process has not yet been achieved, nor can it be foreseen when it will happen; this is in the making-up and stitching of garments.

The delay in the technical development of this final stage of production leads to problems in dealing with the output from the preceding stages. It is due as much to the structure of the clothing industry as to machinery manufacturers:

- the making-up industry traditionally makes mostly short-term strategies and, as it is also composed mainly of small and medium-sized firms, does not lend itself to radical technological change.

- the machinery manufacturers are mainly concerned with selling their output which at present they do without difficulty.

9. Faced with this situation, certain countries such as Japan have centralised the stimulation of technological development. In the Community, past formulae have not produced sufficient synergies to achieve a technical breakthrough. Now the second Research and Development outline programme, taking into account the important resources devoted to increasing industrial competitivity, is better prepared to meet the challenge.

Without wanting to envisage strategies too difficult to undertake in a European context, perhaps the time has come to look at the possibility of adopting a more ambitious approach which on the one hand would regroup, in a form yet to be defined, representatives of the textile and clothing industry as well as those from the machinery manufacturers for that industry, and, on the other hand, would use suitable forms of group research. The Community's financial aid could encourage the launching of such structures.

Intervention of structural policies

10. Changes in the industrial structure have meant an important reduction in employment in the textile and clothing sector. The structural funds have contributed to the redeployment of production facilities in the areas most affected.

It is clear that increasing competition in the textile and clothing market puts pressure on the economies of those countries and regions which largely depend on this sector. The Commission will closely follow developments in these industries so as to quickly be able to resolve any problems and facilitate aid in those zones covered by the Structural Funds. The outline Regulation on the reform of the Structural Funds, adopted by the Council in June 1988[1] provides the framework necessary for such aid.

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[1] Council Regulation No. 2052/88 of 24 June, 1988 on the powers of the Structural Funds and the coordination of activities within the Funds and with those of the European Investment Bank and other existing financial instruments.

CONCLUSIONS

It is highly likely that the Community's textile and clothing industry will still have to undergo important changes in the years to come. This industry has proved in the past its remarkable capacity to adapt to new constraints both internal and external, as shown by the significant increase in productivity.

The industry should be able to maintain a strong industrial presence in the Community as long as Community policy covering the industry ensures fair competition with firms outside the Community as well as between those inside.

ANNEXES

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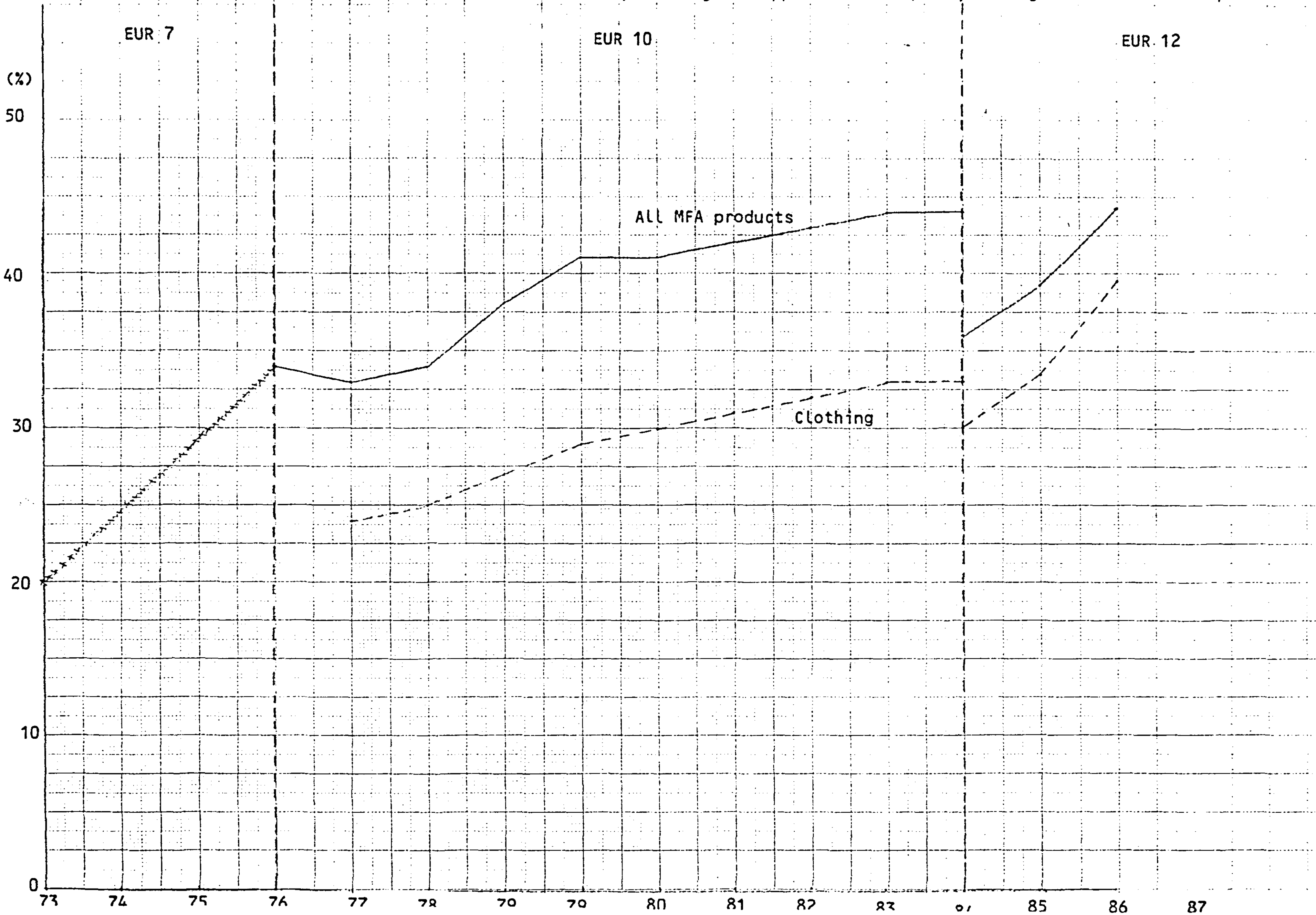
ANNEX XIII	:	Clothing industry: production indices
ANNEX XIV	:	Production and trade: MFA textile and clothing products.

RATE OF PENETRATION

ANNEX I

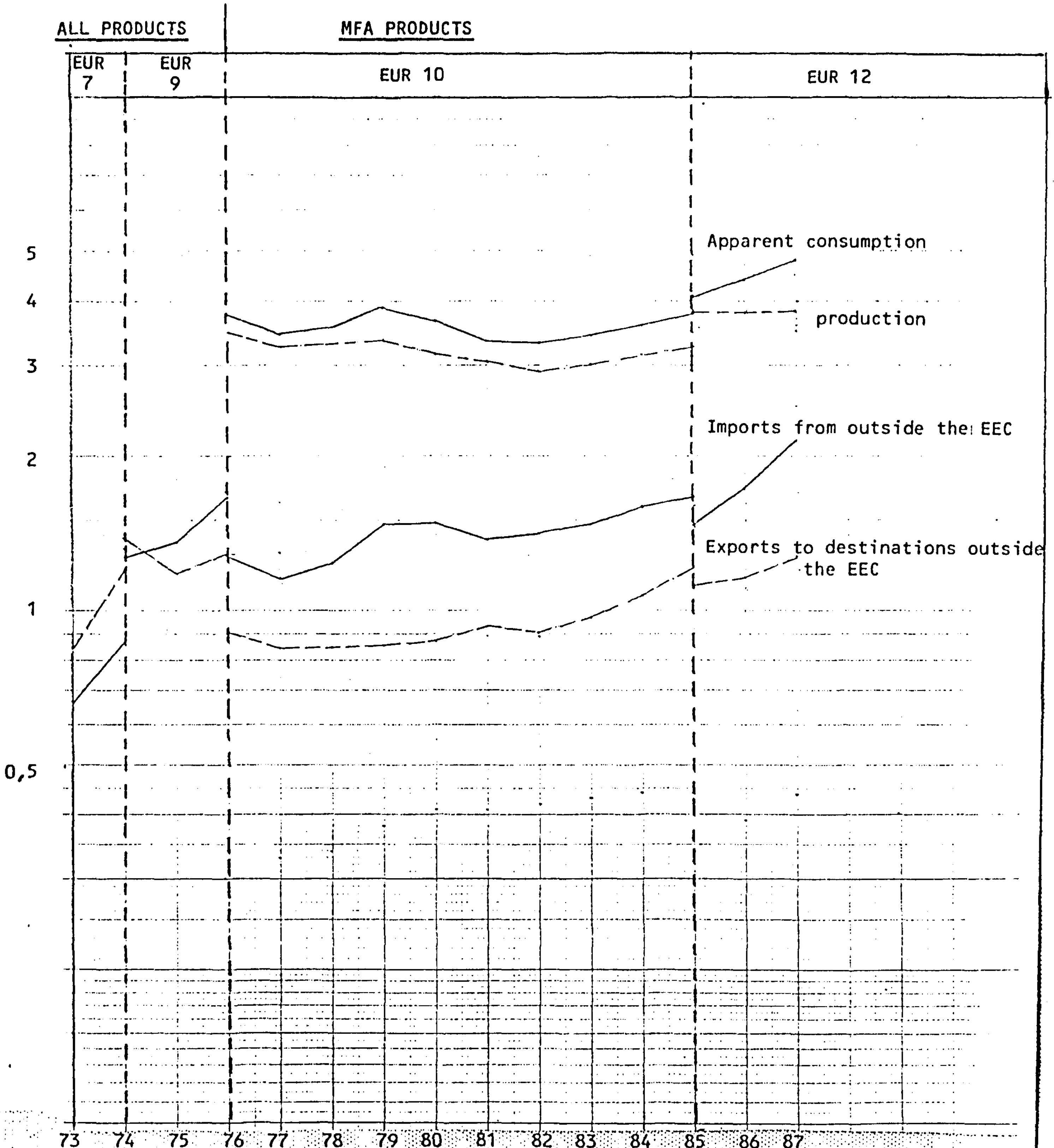
(Imports from outside the EEC as a percentage of apparent consumption, tonnage)



COUNTRY OF ORIGIN Destination : EEC	EUR	IMPORTS IN CATEGORIES SUBJECT TO RESTRICTION, AS % OF AGREED LIMITS				IMPORTS IN CATEGORIES NOT SUBJECT TO RESTRICTION, AS % OF TOTAL IMPORTS				IMPORTS AS % OF TOTAL IMPORTS FROM COUNTRIES COVERED BY TEXTILES POLICY			
		COUNTRIES WITH				COUNTRIES WITH				COUNTRIES WITH			
		AGREEMENTS		ARRANGEMENTS		AGREEMENTS		ARRANGEMENTS		AGREEMENTS		ARRANGEMENTS	
		"10"	"12"	"10"	"12"	"10"	"12"	"10"	"12"	"10"	"12"	"10"	"12"
All MFA products	1984	66				23				60		32	
	1985	63				25				59	67	32	22
	1986		71								68		21
	1987		81		113		45		42		68		21
MFA textiles	1984	62				26				55		35	
	1985	63				28				55	64	34	24
	1986		65								65		22
	1987		76		107		48		33		66		22
MFA clothing	1984	70				19				69		25	
	1985	64				21				66	73	28	20
	1986		77								73		20
	1987		89		132		42		58		72		21

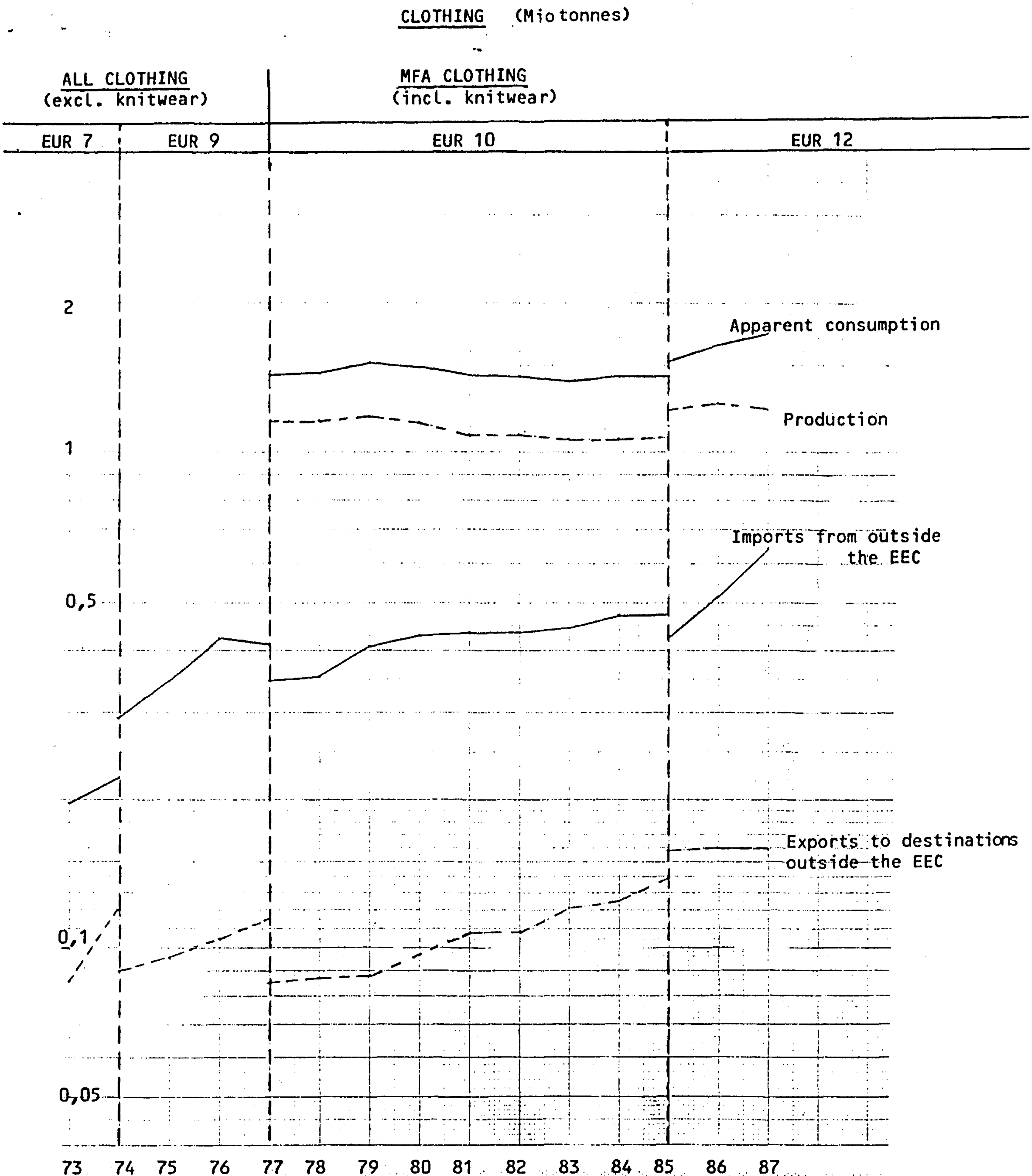
ANNEX III

TEXTILES AND CLOTHING (Mio tonnes)



EUR 7 = D, F, I, BNL, UK
EUR 9 = EUR 7 + IRL, DK
EUR 10 = EUR 9 + GR
EUR 12 = EUR 10 + ESP, PORT.

ANNEX IV


CLOTHING (Mio tonnes)
ALL CLOTHING
(excl. knitwear)
MFA CLOTHING
(incl. knitwear)
EUR 7
EUR 9
EUR 10
EUR 12
2
1
0,5
0,1
0,05
Apparent consumption
Production
Imports from outside the EEC
Exports to destinations outside the EEC
73
74
75
76
77
78
79
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ANNEX V

TRENDS IN EMPLOYMENT (excluding home-work)

EUR 9

	YEAR	TEXTILES (NACE 43)	MAKING-UP[1]	TOTAL
9 countries excluding Greece, Spain and Portugal	1975	1.963,5	1.538,7	3.502,2
	1976	1.808,1	1.520,2	3.328,3
	1977	1.794,6	1.520,4	3.315,0
	1978	1.728,1	1.480,1	3.208,2
	1979	1.653,7	1.448,0	3.101,7
	1980	1.594,9	1.422,8	3.017,7
	1981	1.495,0	1.308,1	2.803,1
	1982	1.419,9	1.238,4	2.658,3
	1983	1.347,1	1.193,1	2.540,2
	1984	1.319,4	1.178,8	2.498,2
	1985	1.253,5	1.098,0	2.351,5
	1986	(1.237,8)*	(1.113,9)	2.352,7
12 countries (estimate)	1986	1.689,8	1.375,9	3.065,7

1) NACE 45 less footwear, less NACE 456

ANNEX VI

EMPLOYMENT IN THE TEXTILE INDUSTRY (NACE 43 including knitwear)

Variable : 03[1] - Wage earners per NACE 43 (= textiles) activity

Unit : Person

YEAR	EEC[2] EUR 9	D	F	I	NL	B	UK	IRL	DK	ESP	GR
1975	1.963.600	396.700	345.600	554.300	55.500	94.700	485.600	16.700	14.500		
1976	1.808.200	368.900	328.900	482.100	46.400	90.000	458.200	18.100	15.600		
1977	1.794.500	359.600	322.800	490.200	44.000	81.600	460.500	18.900	16.900	244.500	
1978	1.728.100	348.500	310.300	477.900	39.200	73.300	444.900	18.500	15.500	237.000	
1979	1.653.700	338.900	298.500	480.800	34.600	68.400	399.000	18.500	15.000	245.800	
1980	1.596.800	335.800	294.200	475.500	32.900	66.500	358.700	18.100	15.100	228.000	
1981	1.495.200	319.000	276.000	479.600	29.200	62.700	299.000	15.800	13.900	214.800	
1982	1.420.900	290.100	263.600	476.500	26.400	59.600	276.100	14.700	13.900	199.000	
1983	1.347.100	268.700	256.200	463.000	22.700	59.400	251.600	11.400	14.100	200.000	
1984	1.319.400	263.400	244.800	462.400	21.700	60.900	242.800	9.600	13.800	175.900	
1985	1.253.500	261.400	237.300	*409.000	21.500	60.900	240.100	8.800	14.500	161.900	
1986	(1.237.800)	258.200	227.800	(400.000)	22.000	59.200	246.000	10.600	(14.000)	172.000	

SOURCE : CRONOS - SOCI

(*) Estimate only (= c)

(1) Previous variable 19 & 10

(2) Excluding Greece, Spain and Portugal)

ANNEX VII

EMPLOYMENT IN THE MAKING-UP SECTOR

(NACE 45 less revised footwear less NACE 456)[1]

Variable: 03 - Wage earners per NACE 45[2] activity Unit : Person

	EUR-9	D	F	I	NL	B	UK	IRL	DK	ESP	GR	PORT
1975	1.538.717	330.656	313.168	381.083	35.480	76.574	368.592	17.145	16.019			
1976	1.520.220	314.339	300.234	421.191	32.900	70.583	347.230	15.440	18.303			
1977	1.520.367	308.584	298.632	431.140	29.761	62.464	352.161	15.616	22.009			
1978	1.480.069	299.432	288.252	425.441	27.534	56.699	347.074	15.043	20.594			
1979	1.448.049	299.048	278.413	414.197	25.755	53.127	339.961	15.416	22.132			
1980	1.422.842	295.425	272.864	421.905	24.900	50.302	322.491	15.697	19.258			
1981	1.308.134	283.741	248.359	409.601	21.354	45.674	268.592	14.434	16.379			
1982	1.238.418	258.681	233.587	403.387	18.500	43.506	250.051	13.815	16.891	84.317[3]		
1983	1.193.135	239.411	232.762	394.496	17.440	42.762	236.671	12.205	17.388	84.195[3]		
1984	1.178.768	233.425	222.856	394.226	16.730	41.788	238.314	13.818	17.611	83.354[3]		
1985	1.098.017	228.833	213.405	333.189	16.180	40.943	232.240	13.692	19.535	82.521[3]		
1986	1.113.889	225.113	205.773	330.225	16.315	39.629	265.861	12.904	18.069			

1) Nace 45 : Footwear + clothing

Revised footwear : European Confederation of the Footwear Industry

Nace 456 : Furs

Source : SOCI EUROSTAT

2) Previous variable 19 & 10

3) NACE 453 (clothing)

ANNEX VIII

EMPLOYMENT TRENDS IN THE TEXTILE INDUSTRIES INCLUDING KNITWEAR

(firms employing more than 20 persons : NACE 43)

EUR 9 (Total excludes Portugal)

Wage earners, excluding home workers

1000 persons

	EEC	D	F	I	NL	B	UK	IRL	DK	GR	P
1975	1.684	352	327	350	49	83	438	16	12	57	134
1976	1.627	340	321	335	45	73	421	17	13	57	132
1977	1.551	323	301	319	40	70	410	17	12	59	132
1978	1.492	316	294	307	35	64	390	17	11	58	138
1979	1.429	307	284	301	32	61	356	18	11	59	-
1980	1.336,9	300,0	272,2	290,4	28,5	58,5	301,9	15,2	10,5	59,7	-
1981	1.225,7	278,5	255,6	274,3	25,2	55,0	252,4	14,8	10,2	59,7	-
1982	1.154,2	255,4	260,0	248,6	22,3	53,0	234,2	12,8	10,4	57,5	
1983	1.091,1	240,4	238,8	235,6	20,6	53,4	220,6	11,1	10,9	59,7	
1984	1.099,5	235,6	233,3	253,9	20,0	54,7	220,2	11,0	10,8	60,0	
1985 1)	1.043,0	231,7	224,9	212,1	20,0	54,8	213,8	10,6	11,9	63,5	
1986 1)	1.024,8	228,4	212,5	200,2	(20,0)	53,5	228,1	10,4	11,7	(60,0)	

SOURCE : VISA 25/05/88

1) Estimate

ANNEX IX

EMPLOYMENT TRENDS IN THE MAKING-UP SECTOR

(firms employing more than 20 persons : NACE 453)

EUR 9

(Total excludes Portugal)

1000 persons

		D	F	I	NL	B	UK	IRL	DK	GR	P
1975	1.087	252	209	198	26	51	302	14	11	24	30
1976	1.051	245	208	189	23	48	290	12	12	24	31
1977	1.002	233	203	177	21	42	277	12	11	26	33
1978	969	234	196	164	19	39	267	12	10	28	38
1979	954	229	194	162	18	37	261	13	10	30	41
1980	899,8	223,0	186,0	154,4	16,6	34,1	237,0	12,5	9,0	27,2	-
1981	800,9	202,6	165,0	146,9	13,8	30,8	196,0	11,9	7,8	26,1	-
1982	759,6	184,5	163,9	137,0	12,3	29,6	186,3	11,7	7,9	26,4	-
1983	788,3	172,4	164,2	176,9	11,2	28,9	177,3	10,9	8,4	38,1	-
1984	755,5	173,1	158,4	164,5	10,2	28,2	183,1	10,7	9,1	38,2	-
1985	718,4	167,7	155,6	117,2	9,9	26,9	191,7	10,8	9,7	28,9	-
1986	704,5	164,6	152,4	111,6	(9,0)	27,3	190,9	10,8	9,9	(28,0)	-

SOURCE : VISA 25/05/88
(for 1983 - 1986)

ANNEX X

KNITWEAR INDUSTRY

Variable : 03 - Number of wage earners, total excluding home workers

NACE code : 436

Unit : 1000 persons

		D	F	I	NL	B	UK	IRL	DK	GR
1975	435,5	98,0	82,7	86,0	8,8	12,5	123,1	5,7	4,9	a) 13,3
1976	418,9	92,8	83,0	83,0	7,9	11,2	115,6	6,1	5,5	b) 13,8
1977	408,0	89,8	79,7	80,0	6,9	10,1	116,7	5,8	4,8	b) 14,2
1978	390,2	88,3	77,3	77,0	6,5	10,0	110,1	5,7	4,2	b) 14,[illegible]
1979	b) 382,9	85,0	76,7	75,0	5,9	8,8	107,5	5,4	4,4	b) 14,2
1980	b) 363,7	84,0	73,0	70,7	c) 5,9	8,1	98,7	4,7	4,2	14,[illegible]
1981	c) 340,5	77,1	73,2	66,8	c) 5,7	7,5	88,2	4,3	4,1	b) 13,6
1982	b) 332,9	71,5	74,7	d) 66,8	b) 4,4	b) 7,1	86,9	b) 3,7	4,7	b) 13,1
1983	325,0	66,8	72,6	68,2	b) 3,9	7,2	82,7	3,8	4,4	b) 15,4
1984	320,8	63,8	b) 70,9	68,7	b) 3,8	b) 7,5	82,6	b) 3,5	4,5	b) 15,5
1985	b) 295,9	b) 64,4	b) 68,4	b) 50,0	b) 3,8	b) 7,5	78,4	b) 3,3	4,8	c) 15,3
1986	b) 294,2	b) 63,5	b) 64,6	b) 47,2	c) 3,0	b) 7,3	b) 85,6	b) 3,3	b) 4,7	c) 15,0

SOURCE : OSCE - VISA : 26/05/88 for 1983-1986.

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TRADE IN TEXTILES AND CLOTHING 1985-1987

Source: Commission Services using EUROSTAT data.

Definitions of geographical zones in the above tables

Code No.	
3064	Countries covered by the textile policy are countries with agreements, countries with arrangements, other state-trading countries, other developing countries.
3070	Countries with agreements: this group includes countries with agreements plus Taiwan and Egypt.
3072	Preferential countries: Malta, Turkey, Morocco, Tunisia, Egypt, Cyprus.
9030	Developing countries: this group does not include Malta, Turkey, Yugoslavia, Israel and China.
9001	N.I.C. (newly industrialised countries): Argentina, Brazil, Venezuela, Hong Kong, Taiwan, Singapore, Mexico, South Korea.
9068	Eastern European countries with agreement: Poland, Czechoslovakia, Hungary, Romania, Bulgaria.
9055	ASEAN: Malaysia, Philippines, Singapore, Thailand, Indonesia.
9002	Dominants: Taiwan, Hong Kong, South Korea, Macao.

IMPORTS OF TEXTILES AND CLOTHING INTO EUR 12 : 1985 - 1987

000 tonnes

Code N° DB	Area \ Product		All Textiles 21.000	MFA Textiles + Clothing 21.100	MFA Textiles 22.110	MFA Clothing 22.120
3011	From outside the EEC	1985 1986 1987	2.306 2.587 3.035	1.598 1.863 2.294	1.119 1.258 1.534	478 605 760
3071	Countries not covered by the textiles policy	1985 1986 1987	694 756 787	423 474 507	385 433 464	38 41 43
3064	Countries covered by the textiles policy of which	1985 1986 1987	1.613 1.832 2.249	1.175 1.389 1.787	735 826 1.071	440 564 717
3070	Countries with agreements	1985 1986 1987	1.106 1.297 1.580	792 944 1.220	471 535 705	321 409 515
3072	Preferential countries	1985 1986 1987	342 328 430	260 289 384	173 180 236	88 110 148
9030	Developing countries	1985 1986 1987	708 1.131 1.421	497 879 1.145	268 499 673	232 380 473
9001	N.I.C. (newly industrialised countries	1985 1986 1987	364 458 516	330 411 455	175 201 222	154 210 233
9068	East European countries with agreements (China excl.)	1985 1986 1987	186 181 187	119 118 130	62 62 72	57 56 58
9055	ASEAN	1985 1986 1987	106 142 187	72 103 148	47 64 79	26 40 69
9002	Dominant countries	1985 1986 1987	265 365 396	261 350 371	98 125 128	164 226 243

EXPORTS OF TEXTILES AND CLOTHING
FROM EUR 12 : 1985 - 1987

000 tonnes

Code N° DB	Product / Area		All Textiles 21.000	MFA Textiles + Clothing 21.100	MFA Textiles 22.110	MFA Clothing 22.120
3011	To destination outside the EEC	1985 1986 1987	2.027 1.908 2.114	1.517 1.460 1.609	1.332 1.266 1.345	185 194 264
3071	Countries not covered by the textiles policy	1985 1986 1987	982 992 1.035	805 808 851	673 659 689	132 148 162
3064	Countries covered by the textiles policy, of which	1985 1986 1987	1.044 915 1.079	712 652 756	660 607 656	52 45 101
3070	Countries with agreements	1985 1986 1987	396 361 394	246 242 256	232 229 243	14 13 13
3072	Preferential countries	1985 1986 1987	194 166 193	124 113 134	114 104 124	10 10 10
9030	Developing countries, of which	1985 1986 1987	448 528 677	379 409 512	349 380 425	29 29 87
9001	N.I.C. (newly industrialised countries	1985 1986 1987	472 553 813	39 39 50	36 37 47	3 2 2
9068	Eastern European Countries with agreements (China excl.)	1985 1986 1987	1.039 976 994	84 76 77	78 71 71	6 5 6
9055	ASEAN	1985 1986 1987	17 18 18	16 15 16	15 14 15	1 1 1
9002	Dominant countries	1985 1986 1987	31 39 59	25 27 33	24 26 32	1 1 1

BALANCE OF TRADE IN TEXTILES AND CLOTHING
FOR EUR 12 : 1985 - 1987

000 tonnes

Code N° DB	Product / Area	Year	All Textiles 21.000	MFA Textiles + Clothing 21.100	MFA Textiles 22.110	MFA Clothing 22.120
3011	Outside the EEC	1985 1986 1987	- 280 - 680 - 921	- 80 - 402 - 685	+ 213 + 7 - 189	- 293 - 410 - 496
3071	Countries not covered by the textiles policy	1985 1986 1987	+ 289 + 236 + 248	+ 382 + 334 + 344	+ 288 + 226 + 224	+ 94 + 107 + 119
3064	Countries covered by the textiles policy, of which	1985 1986 1987	- 569 - 916 -1169	- 463 - 737 -1030	- 75 - 219 - 414	- 388 - 518 - 616
3070	Countries with agreements	1985 1986 1987	- 710 - 936 -1185	- 545 - 701 - 963	- 239 - 306 - 462	- 307 - 395 - 501
3072	Preferential countries	1985 1986 1987	- 148 - 162 - 237	- 137 - 176 - 250	- 59 - 76 - 112	- 78 - 100 - 138
9030	Developing countries, of which	1985 1986 1987	- 260 - 604 - 743	- 121 - 469 - 633	82 - 119 - 248	- 203 - 351 - 386
9001	N.I.C. (newly industrialised countries	1985 1986 1987	- 317 - 403 - 434	- 290 - 371 - 406	- 140 - 164 - 175	- 151 - 208 - 231
9068	Eastern European countries with agreements (China excl.)	1985 1986 1987	- 82 - 84 - 88	- 35 - 42 - 53	+ 16 + 9 0	- 51 - 51 - 53
9055	ASEAN	1985 1986 1987	- 89 - 124 - 169	- 56 - 88 - 132	- 32 - 49 - 64	- 25 - 39 - 68
9002	Dominant countries	1985 1986 1987	- 234 - 325 - 336	- 237 - 323 - 338	- 73 - 99 - 96	- 163 - 225 - 242

IMPORTS OF TEXTILES AND CLOTHING INTO EUR 12 : 1985 - 1987

Mio. EUA

Code N° DB	Product / Area		ALL Textiles 21.000	MFA Textiles + Clothing 21.100	MFA Textiles 22.110	MFA Clothing 22.120
3011	From outside the EEC	1985 1986 1987	18.317 19.576 22.585	16.758 18.051 20.963	7.453 7.614 8.386	9.305 10.438 12.577
3071	Countries not covered by the textiles policy	1985 1986 1987	5.383 5.707 5.858	4.636 4.977 5.101	3.370 3.624 3.666	1.266 1.353 1.434
3064	Countries covered by the textiles policy , of which	1985 1986 1987	12.935 13.868 16.726	12.122 13.075 15.862	4.082 3.991 4.720	8.039 9.084 11.143
3070	Countries with agreements	1985 1986 1987	9.401 9.779 11.618	8.706 9.133 10.916	2.674 2.530 2.972	6.032 6.602 7.944
3072	Preferential countries	1985 1986 1987	2.310 2.613 3.396	2.246 2.536 3.308	811 754 956	1.434 1.783 2.352
9030	Developing countries, of which	1985 1986 1987	6.407 9.146 11.035	6.083 8.735 10.571	1.659 2.613 3.159	4.425 6.122 7.412
9001	N.I.C. (newly industrialised countries	1985 1986 1987	4.118 4.368 4.914	4.004 4.229 4.728	936 889 953	3.068 3.339 3.775
9068	Eastern European countries with agreements (China excl.)	1985 1986 1987	1.309 1.319 1.366	1.206 1.230 1.284	295 294 290	911 936 994
9055	ASEAN	1985 1986 1987	757 822 1.241	707 790 1.211	254 254 305	454 535 906
9002	Dominant countries	1985 1986 1987	3.918 4.282 4.735	3.847 4.190 4.595	577 609 637	3.270 3.582 3.958

EXPORTS OF TEXTILES AND CLOTHING
FROM EUR 12 : 1985 - 1987

Mio. EUA

Code N° DB	Product / Area		All Textiles 21.000	MFA Textiles + Clothing 21.100	MFA Textiles 22.110	MFA Clothing 22.120
3011	To destinations outside the EEC	1985 1986 1987	19.760 18.798 19.106	16.831 16.062 16.259	10.624 9.874 9.841	6.206 6.188 6.417
3071	Countries not covered by the textiles policy	1985 1986 1987	12.591 12.550 12.703	10.784 10.686 10.765	5.903 5.595 5.570	4.881 5.090 5.195
3064	Countries covered by the textiles policy , of which	1985 1986 1987	7.168 6.248 6.393	6.046 5.377 5.484	4.721 4.279 4.267	1.325 1.098 1.217
3070	Countries with agreements	1985 1986 1987	2.558 2.432 2.538	2.158 2.109 2.176	1.837 1.803 1.852	320 307 324
3072	Preferential countries	1985 1986 1987	1.130 1.084 1.169	953 961 1.051	813 817 900	140 144 152
9030	Developing countries, of which	1985 1986 1987	3.833 3.945 4.111	3.308 3.360 3.491	2.446 2.581 2.536	861 779 954
9001	N.I.C. (newly industrialised countries	1985 1986 1987	666 637 723	546 502 543	434 400 433	112 102 110
9068	Eastern European countries with agreements (China excl.)	1985 1986 1987	831 794 806	774 739 748	661 637 637	113 103 111
9055	ASEAN	1985 1986 1987	157 141 146	143 126 129	120 109 109	22 16 20
9002	Dominant countries	1985 1986 1987	491 475 568	401 370 419	322 295 337	78 76 82

BALANCE OF TRADE IN TEXTILES AND CLOTHING
FOR EUR 12 : 1985 - 1987

Mio. EUA

Code N° DB	Products / Area		All Textiles 21.000	MFA Textiles + Clothing 21.100	MFA Textiles 22.110	MFA Clothing 22.120
3011	Outside the EEC	1985 1986 1987	+ 1.442 - 778 - 3.479	+ 73 - 1.989 - 4.705	+ 3.172 + 2.260 + 1.455	- 3.099 - 4.249 - 6.159
3071	Countries not covered by the textiles policy	1985 1986 1987	+ 7.209 + 6.842 + 6.845	+ 6.148 + 5.709 + 5.665	+ 2.532 + 1.972 + 1.904	+ 3.615 + 3.737 + 3.761
3064	Countries covered by the textiles policy , of which	1985 1986 1987	- 5.766 - 7.620 -10.333	- 6.075 - 7.698 -10.378	+ 639 + 288 - 452	- 6.713 - 7.986 - 9.926
3070	Countries with agreements	1985 1986 1987	- 6.843 - 7.347 - 9.081	- 6.548 - 7.023 - 8.740	- 836 - 728 - 1.120	- 5.712 - 6.296 - 7.620
3072	Preferential countries	1985 1986 1987	- 1.181 - 1.529 - 2.228	- 1.294 - 1.576 - 2.256	+ 1 + 63 - 56	- 1.295 - 1.639 - 2.200
9030	Developing countries, of which	1985 1986 1987	- 2.574 - 5.200 - 6.924	- 2.776 - 5.375 - 7.080	+ 787 - 32 - 622	- 3.563 - 5.343 - 6.458
9001	N.I.C. (newly industrialised countries	1985 1986 1987	- 3.452 - 3.731 - 4.190	- 3.458 - 3.727 - 4.185	- 502 - 490 - 520	- 2.956 - 3.238 - 3.665
9068	Eastern European countries with agreements (China excl.)	1985 1986 1987	- 477 - 524 - 560	- 432 - 491 - 535	+ 366 + 343 + 348	- 798 - 833 - 883
9055	ASEAN	1985 1986 1987	- 600 - 681 - 1.095	- 564 - 664 - 1.082	- 133 - 145 - 196	- 431 - 519 - 386
9002	Dominant countries	1985 1986 1987	- 3.426 - 3.808 - 4.167	- 3.446 - 3.820 - 4.176	- 254 - 314 - 300	- 3.192 - 3.506 - 3.875

Tableau 1

INDUSTRIE TEXTILE COMMUNAUTAIRE

NACE 43

Indices de production

Table 1

E.E.C. TEXTILE INDUSTRY

NACE 43

Production indexes

PAYS	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	87/76
D	101.9	100.0	102.0	100.0	93.4	88.6	88.9	91.6	94.9	96.5	94.6	-2.1%
F	105.6	102.9	105.1	100.0	93.3	92.9	90.6	90.5	89.0	86.7	82.2	-5.2%
I	88.5	84.3	95.4	100.0	99.5	97.6	89.5	06.4	97.6	101.6	103.6	+2.0%
NL	107.0	105.0	106.0	100.0	96.0	92.0	90.0	94.0	99.0	99.9	.	.
UEBL	93.6	89.7	97.1	100.0	97.3	96.0	103.4	104.2	105.0	107.4	103.0	-4.1%
UK	127.4	126.1	121.0	100.0	91.8	89.5	91.6	93.7	98.3	99.0	102.8	+3.8%
IRL	109.5	114.0	113.7	100.0	106.8	102.1	93.9	93.3	87.5	86.8	88.3	+1.7%
DK	96.6	97.8	101.4	100.0	102.8	105.9	109.2	118.8	116.8	116.8	112.1	-4.0%
GR	88.8	94.3	101.5	100.0	100.7	94.0	92.1	92.1	95.6	103.1	.	.
ESP	97.2	97.4	103.2	100.0	90.4	92.0	94.5	91.6	95.8	103.0	106.2	+3.1%
PORT	77.6	79.1	92.2	100.0	97.2	99.0	102.4	105.9	114.3	117.2	.	.
EUR 12	97.3	95.2	101.4	100.0	95.9	94.0	91.6	94.7	96.7	98.4	98.3	-0.1%

Tableau 2

INDICES DE PRODUCTION

INDUSTRIE COMMUNAUTAIRE DE L'HABILLEMENT

Table 2

PRODUCTION INDEXES

E.E.C. CLOTHING INDUSTRY

1980 = 100

PAYS	1977	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	87/86
[illegible]	104.6	104.1	102.8	100.0	91.3	82.3	81.3	82.0	81.8	83.5	79.8	-4.4%
I	99.0	87.5	100.3	100.0	94.6	96.1	90.5	98.2	96.1	98.7	91.0	-7.8%
NL	109.0	107.0	105.0	100.0	85.0	85.0	82.0	77.0	74.0	74.3	.	.
UEBL	104.2	104.1	103.2	100.0	99.1	99.1	98.1	94.3	93.2	99.5	90.4	-9.2%
UK	107.3	107.3	110.4	100.0	94.6	94.6	98.3	103.5	108.0	107.9	110.8	2.7%
IRL	102.2	100.4	104.4	100.0	106.6	106.6	100.2	100.5	100.9	106.4	100.5	-5.5%
DK	101.5	96.8	98.9	100.0	102.4	102.4	105.0	125.8	125.8	120.6	102.3	-15.1%
GR	95.5	97.3	100.5	100.0	85.1	85.1	77.9	75.7	75.7	75.7	68.6	-9.4%
ESP	116.4	108.7	106.3	100.0	86.5	86.5	82.7	79.3	79.3	82.1	79.7	-3.0%
EUR 12	104.2	98.2	103.4	100.0	91.8	91.0	88.4	90.7	91.2	93.4	88.6	-5.2%

ANNEXE XIV

ECHANGES

DE PRODUITS TEXTILES ET D'HABILLEMENT AMF

(en 1.000 T.)

	IMPORTATIONS			EXPORTATIONS		
	totales	extra	intra	totales	extra	intra
CEE	5.345	2.134	3.212	4.346	1.276	3.070
D	1.302	678	623	1.099	286	813
F	857	257	600	412	108	305
I	684	329	355	812	220	592
NL	559	174	385	459	82	377
UEBL	450	115	335	559	146	413
UK	930	418	541	317	121	196
IRL	85	17	68	87	9	78
DK	167	66	101	78	45	32
GR	80	18	62	160	20	140
ESP	140	32	108	167		
PORT	92	29	63	197	62	135

Source : élaboration des services de la Commission à partir de données OSCE.