

World Textile and Apparel Trade and Production Trends: USA and EU

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Abstracts

US clothing demand contracted in 2008 for the first time since the late 1940s. Sales via clothing and clothing accessory stores, and department stores were down although sales via warehouse clubs and superstores were dynamic. Clothing sales are expected to decline further in 2009 as consumers cut back on their spending, and devote a larger share of their disposable income to savings.

Clothing imports fell by 2.7% in volume terms, and the fall was evident in garments made from all of the major fibre types cotton, wool, man-made fibres, and silk blends and non-cotton vegetable fibres (SBVF). Textile imports were down by 7.2%, reflecting declines in yarns, fabrics and made-up textiles. China remained the USA's largest textile and clothing supplier in 2008 with a 41% share of the market. Other major suppliers included Pakistan, India, Mexico and Vietnam. US production of textiles and clothing fell sharply, reflecting the weakening market as well as the continuing migration of production to lower-cost foreign locations. The fall in output also had a detrimental effect on employment. However, exports rose by 1.1% in textiles and by 2.6% in clothing.

EU textile and clothing production also declined in 2008, and the decline accelerated following falls in the second half of 2007. Clothing output in the third quarter of 2008 was down by 4.7% compared with the corresponding period a year earlier while textile output was down by an even sharper 8.7%.

The drop in output came after the elimination of safeguard quotas against certain Chinese products at the end of 2007, and coincided with a worsening of the EU trade deficit in 2008. Having said that, imports from most of the major suppliers weakened in volume terms. During the first 11 months of 2008, textile and clothing imports from Hong

Kong, Indonesia, South Korea, Thailand, Turkey and Vietnam all fell at double digit rates. The main exception was China, which raised its shipments to the EU by 6.5%.

EU firms have been achieving gains in certain export markets. In Eastern Europe, for example, notable successes have included Russia which became the largest destination for EU clothing exports in 2007 and Ukraine. Clothing exports to the United Arab Emirates have also fared particularly well.

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