

Textile industry in the Euro-Mediterranean region

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Since 1 January 1995, trade in textiles and clothing¹ (T/C) has been governed within the WTO (World Trade Organisation) by the Agreement on Textiles and Clothing (ATC). On 1 January 2005, the ATC will expire and every country in the WTO will have unrestricted access to European and American markets, which will have a radical effect on international competition in this sector. The Mediterranean partner countries² (MPCs), along with the EU Member States, are leading players in the T/C sector. In addition, the MPCs and the European Union are essential partners for trade in goods produced by the textiles and clothing industry.

With the expiry of the agreement imminent, this statistical report³ provides some answers to a series of questions. Where do the MPCs now stand in relation to the EU in trade in textiles and clothing? Which countries are most involved? What products do they specialise in? What is the detailed pattern of trade between the EU and the MPCs in various products in the T/C sector, and which countries are competing with the MPCs?

Statistics in focus

EXTERNAL TRADE

THEME 6 – 3/2003

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Figure 1 - EU and MPC-12: total trade (imports+exports in EUR mio)

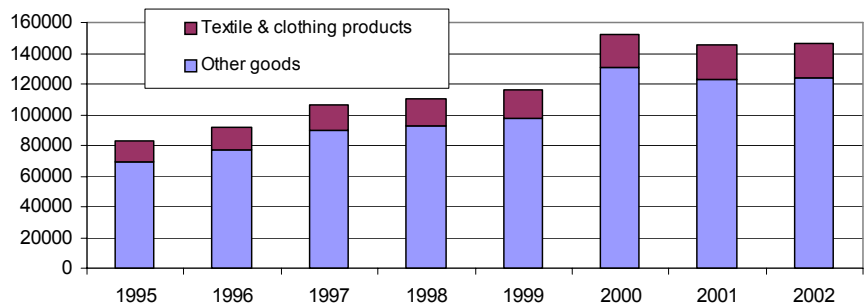
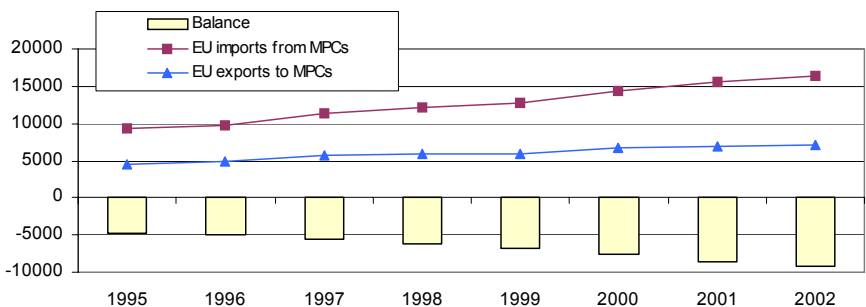


Figure 2 - Trade in textiles and clothing between EU and MPC-12 (EUR mio)



Textiles and clothing: major products for the MPCs and the EU

Over the last decade most of the MPC countries have become more open to external trade. Relations with the EU have developed tremendously, and trade in manufactured goods has always had a prominent role.



¹ The textile and clothing industry comprises the treatment of raw materials (preparation of natural and synthetic fibres), the production and preparation of fabrics (weaving, knitting, dyeing, printing, etc) and the transformation into products (clothing, coverings, household linen, etc). In the Combined Nomenclature (CN) used here, textile products (fabric, yarn, etc) are covered by Chapters 50-60 and 63 and clothing products (clothes) by Chapters 61 and 62.

² The 12 Mediterranean partner countries (MPC-12) are: Algeria (DZ), Morocco (MA), Tunisia (TN), Egypt (EG), Jordan (JO), Lebanon (LB), Syria (SY), Israel (IL), Palestinian Authority (PS), Cyprus (CY), Malta (MT) and Turkey (TR).

³ This publication has benefited greatly from the advice and comments of Nathalie ROUX (Femise).

This comment is particularly borne out by the important significance of trade in textiles and clothing (products 50-63 in the HS classification). Internationally, the European Union ranks first for trade in textiles and clothing. The MPCs are also major partners in such trade, coming seventh in the ranking (Figure 3). Textiles and clothing accounted for 14-17% of total trade between the two areas in the 1990s and imports and exports of these products went up overall by a factor of nearly three between 1990 and 2002, whereas trade in general increased only 2.5 times.

In addition, the T/C sector is significant in terms of jobs and its contribution to total industrial production in several MPCs and in most of the EU Member States. It is the leading sector when it comes to creating manufacturing jobs in the MPC countries, accounting for approximately 20 000 new jobs a year⁴. Exports of textiles and clothing accounted for as much as 42% of Tunisia's exports in 2001, more than 33% for Turkey and Morocco and 17% for Egypt and Jordan (Table 1). In the European Union the T/C sector provided jobs for more than 2 million people in 120 000 firms⁵ in 2001.

EU and MPCs: essential partners

The textiles and clothing industry is very international in nature. The industry is organised internationally in accordance with customs constraints and production constraints (costs, quality, delivery times, etc) in connection with the countries involved⁶.

This means that, thanks to their geographic proximity and regional agreements, the MPCs and the EU Member States have become essential partners in the T/C sector⁷. The twelve-strong group of MPC countries (MPC -12) ranks ahead of China as the European Union's main partner for trade in these products. Several MPCs (Turkey, Tunisia, Morocco) are among the EU's main individual partners (Figure 4).

For the MPCs, the European Union is the primary and almost sole destination for exports from Tunisia, Morocco, Malta, Cyprus and Algeria, and it is also a major partner for Turkey (Figure 5). The EU is also a major supplier of textiles and clothing to several MPCs. For instance, more than 80% of the goods imported by Morocco or Tunisia come from the EU.

⁴ Femise report, July 2000.

⁵ <http://europa.eu.int/comm/enterprise/textile/index.htm>

⁶ See: *Mondialisation et régionalisation: le cas des industries du textile et de l'habillement*, CEPII, Document de travail n° 2002-08.

⁷ See: *Les enjeux du secteur textile-habillement en Méditerranée*, DREE, Fiche de synthèse, January 2002.

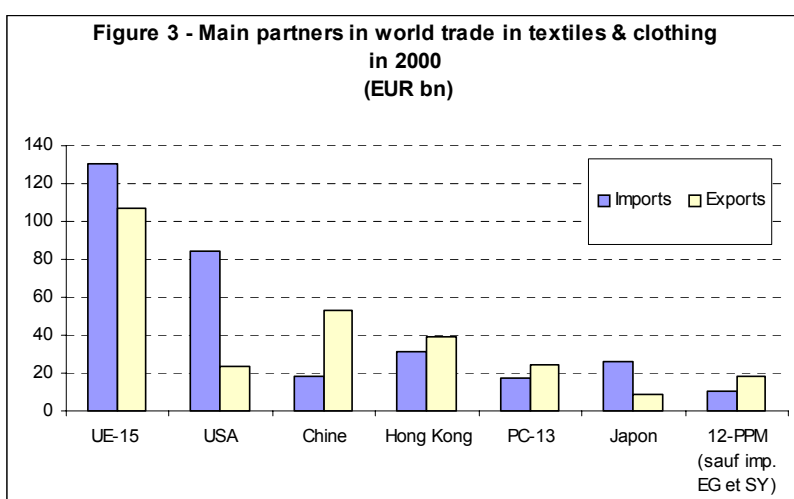
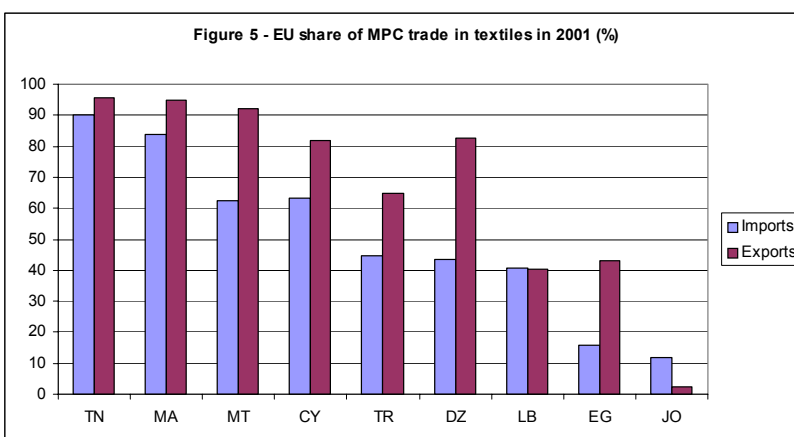
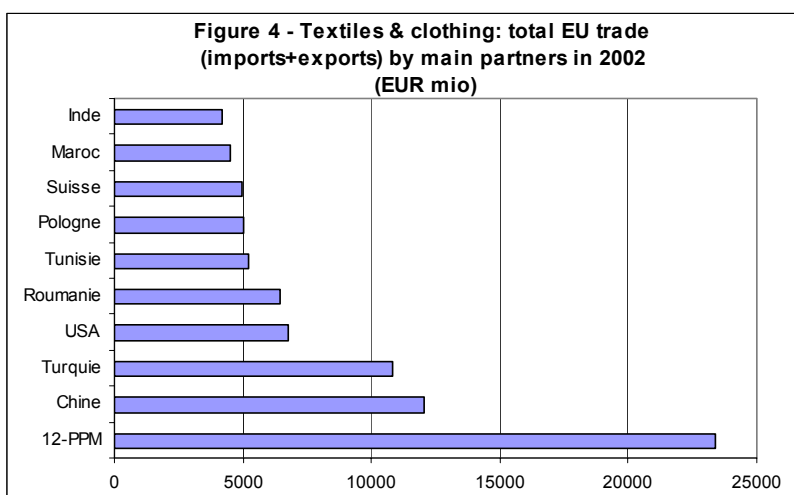


Table 1 - Textiles as share of total trade of MPCs in 2001

	Trade in textiles			Total trade			Textiles	
	EUR mio						% of total	
	Imports	Exports	Balance	Imports	Exports	Balance	Imports	Exports
TN	2292	3124	833	10677	7380	-3297	21.5	42.3
MA	1973	2754	780	12330	7975	-4354	16.0	34.5
TR	3310	11517	8206	45996	34857	-11139	7.2	33.0
JO	442	357	-85	5448	2133	-3314	8.1	16.7
CY	270	38	-231	3744	486	-3258	7.2	7.9
MT	166	185	19	2826	2034	-792	5.9	9.1
LB	497	85	-413	7200	890	-6310	6.9	9.5
EG	300	811	511	14248	4649	-9599	2.1	17.4
IL	1389	1272	-117	37009	32329	-4679	3.8	3.9
DZ	185	2	-183	10982	21410	10427	1.7	0.0

Source: Eurostat excluding Israel; Comtrade.



Turkey, Morocco, Tunisia: main players

Among the MPCs, the main players for trade in textiles and clothing are Turkey, Morocco and Tunisia. In 2002, textiles and clothing accounted for nearly 40% of Tunisia's total trade with the EU, a third of EU-Morocco trade and about a quarter of the trade between the Union and Turkey (Figure 6 and Table 2). Together, these three countries accounted for practically 90% of MPC trade with the European Union in textiles and clothing.

One of the major difference between the two Maghreb countries and Turkey lies in the size of their trade in textiles and clothing with the European Union. While the EU is the main and almost only partner for Morocco and Tunisia, it accounts for only just over half of Turkey's trade in these products. On the other hand, one common feature which links these three countries is that their T/C trade tends to be with only certain Member States: Morocco with France, the United Kingdom and Spain; Tunisia with France and Italy; Turkey with Germany, the United Kingdom and Italy. This shows that Germany, France, the United Kingdom and Italy are the Member States which are the MPCs' main trading partners, accounting for 75% of EU-MPC trade in 2002 (Table 3).

The Mashrek countries (Egypt, Jordan, Lebanon, Syria and the Palestinian Authority) and Israel tend to be less geared to the EU than the Maghreb countries in their trading relations. This applies to textiles and clothing as well. However, the sector is still a major component of trade for some countries, and at national level it is an economic sector of no little importance.

EU: importer of clothing and exporter of textiles

When trade is broken down by product groups, it can be seen that the European Union imports primarily clothing and exports textiles (fabric, yarn) in its trade with the MPCs (Figure 7).

The textile industry (spinning, weaving, knitting, etc) is capital-intensive. It needs sizeable investment and relies on advanced technologies. It tends to be located in the European Union. The manufacture of clothing, on the other hand, is labour-intensive. European industry subcontracts some of this work to the MPCs to take advantage of lower labour costs. The MPCs thus use European textiles to make clothing which is then re-exported to the EU.

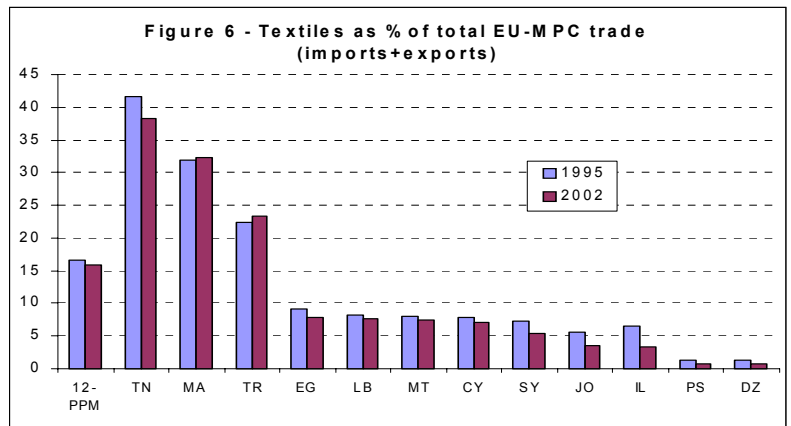


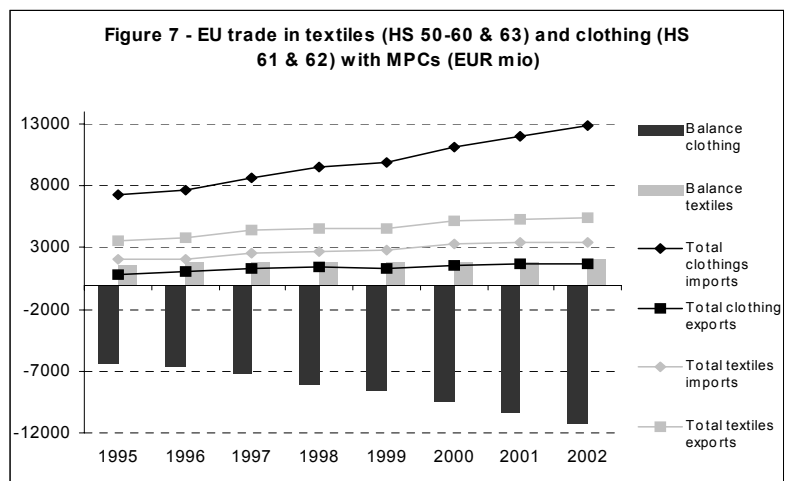
Table 2 - EU trade in textiles & clothing with MPCs

	EUR mio					%		%, 2002	
	1995		2002		2002	Variation 95/02		%, country	
	Imp.	Exp.	Imp.	Exp.		Imp.	Exp.	Imp.	Exp.
MPC-12	9247	4435	16294	7069	-9226	76.2	59.4	100	100
Turkey	4274	799	8964	1873	-7090	109.7	134.4	55	27
Tunisia	1841	1287	3115	2083	-1032	69.2	61.8	19	29
Morocco	1733	1060	2735	1764	-971	57.9	66.4	17	25
Egypt	495	171	596	155	-441	20.2	-9.3	4	2
Israel	453	472	366	367	1	-19.2	-22.1	2	5
Syria	177	51	271	64	-207	52.7	23.8	2	1
Malta	138	109	170	117	-53	22.8	7.3	1	2
Cyprus	99	115	51	204	154	-48.8	77.5	0	3
Lebanon	21	193	14	225	212	-33.1	16.9	0	3
Jordan	14	52	11	70	59	-19.8	33.6	0	1
Algeria	2	125	3	146	143	51.0	16.5	0	2
Gaza Strip & W	0.0	0.1	0.0	0.3	0.3		344.3	0	0

Table 3 - EU trade in textiles & clothing with MPCs: main countries in 2002

	Imports					Exports				
	EUR mio									
	MPC-12	TN	EG	MA	TR	MPC-12	TN	EG	MA	TR
EU-15	16295	3115	596	2735	8964	7069	2083	155	1764	1874
France	3141	1205	49	1027	785	1626	728	13	516	146
Germany	4238	400	69	254	3369	890	231	31	108	410
Italy	1847	788	172	96	646	1753	677	56	186	485
United Kingdom	3141	110	200	591	1994	632	71	19	291	130
Spain	895	52	21	520	274	775	116	4	445	82
% share of EU-MPC trade in textiles & clothing										
EU-15	100	100	100	100	100	100	100	100	100	100
France	19	39	8	38	9	23	35	8	29	8
Germany	26	13	12	9	38	13	11	20	6	22
Italy	11	25	29	4	7	25	33	36	11	26
United Kingdom	19	4	34	22	22	9	3	13	16	7
Spain	5	2	4	19	3	11	6	3	25	4

How to read the table: for example, in 2002 France (FR) imported from Morocco (MA) textiles & clothing valued at EUR 1 027 million, representing 38% of total EU-Morocco trade in textiles & clothing.



The result is that the MPCs' trade surplus for clothing has steadily risen since 1995. Over the period since then, the EU's imports of clothing have doubled and the MPCs have also doubled their surplus on trade in textiles and clothing with the EU.

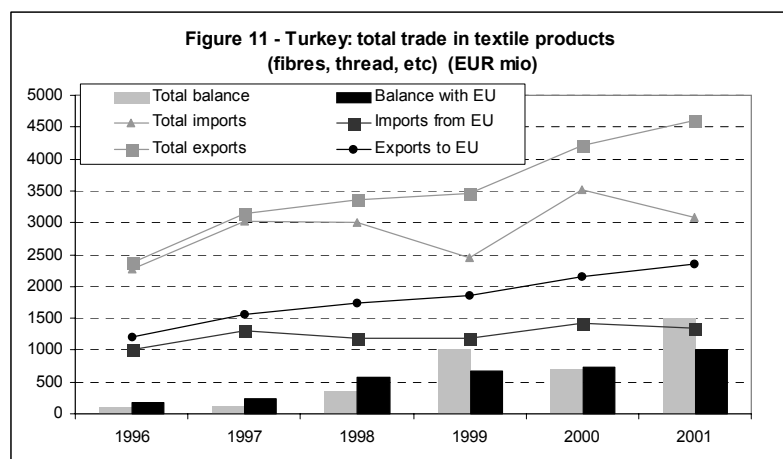
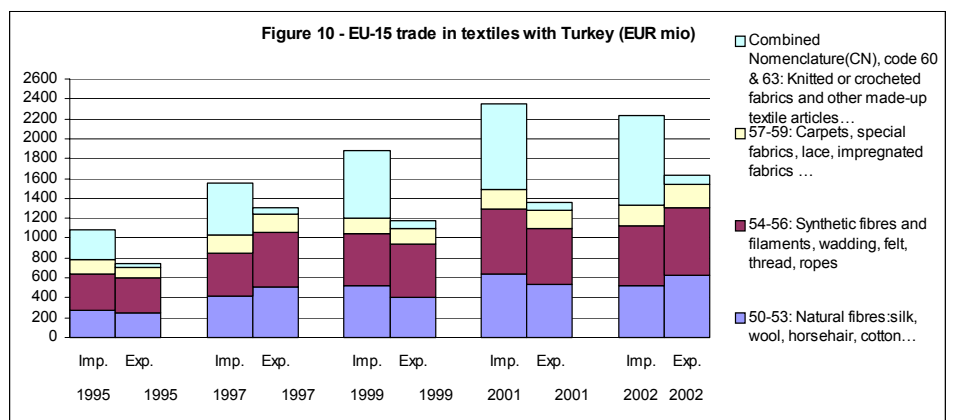
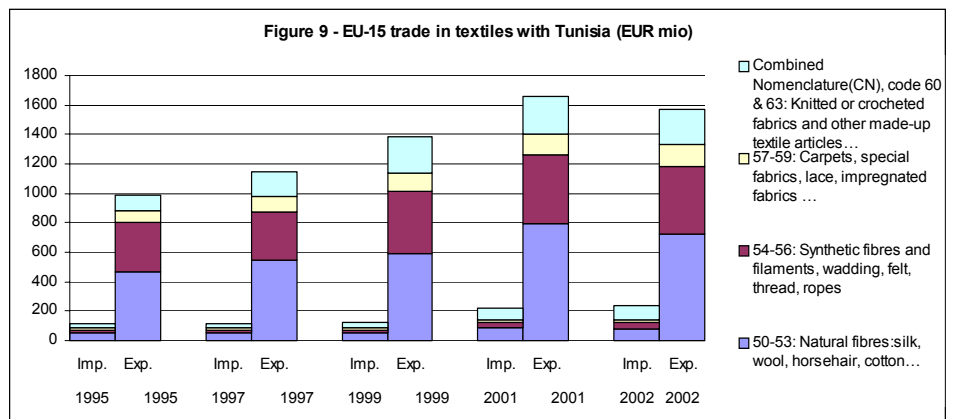
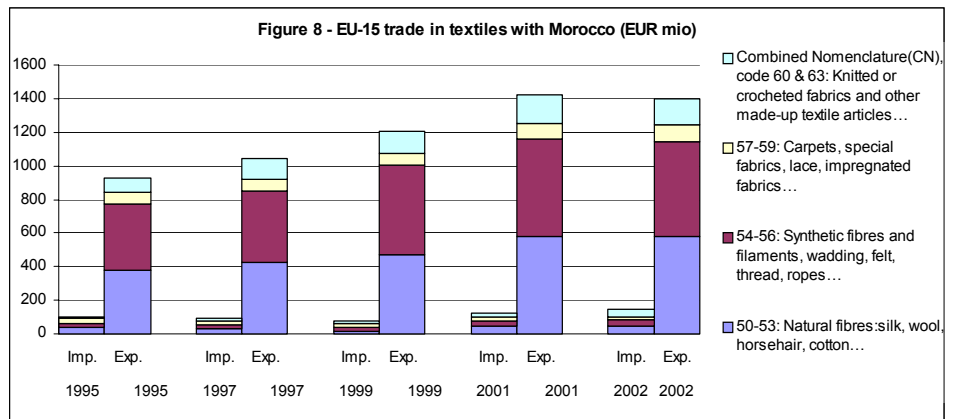
EU textile exports to the main MPCs

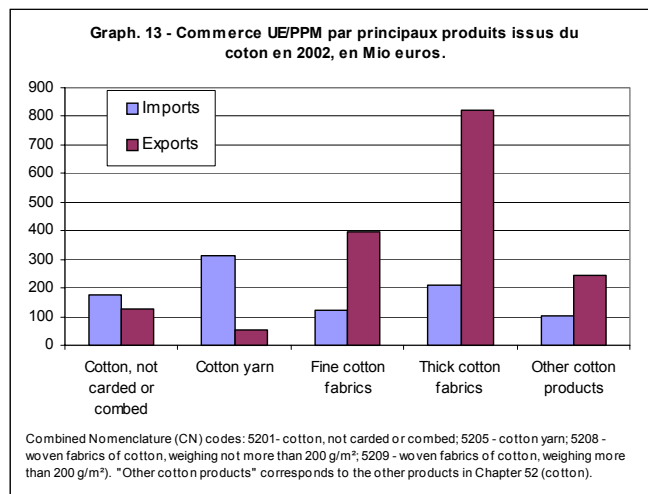
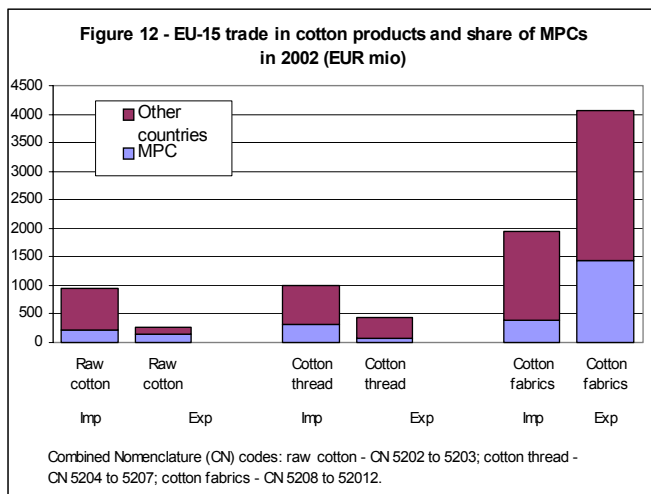
If we consider only the three countries which are most important to the European Union when it comes to trade in textiles and clothing - Turkey on the one hand, and Morocco and Tunisia on the other - there is one significant feature which differentiates Turkey from the other two: the EU imports more textiles (fabric, yarn) from Turkey that it exports. In the case of exports of textiles from Morocco and Tunisia to the EU, the figures are low but rising slightly.

One reason for this is that Turkey gets its textile supplies from countries other than those in the EU. Nevertheless, the figures reported by Turkey show that the country's exports of textiles (fabric, yarn) have risen, whereas its imports from both the EU and the rest of the world are tending to slacken off (Figure 11). Turkey remains a major exporter of clothing.

The conclusion is that Turkey itself is producing more and more textiles (fabric, yarn), which are either used by the country's clothing industry or exported, especially to the EU⁸.

⁸See: *Mondialisation et régionalisation: le cas des industries du textile et de l'habillement*, CEPII, working document 2002-08.





Among EU exports, the dominant items are synthetic fibres and filaments and natural fibres. The former are produced by the chemical industry, whereas natural fibres are made from raw materials from the agricultural sector. Silk and wool account for very little of EU-MPC trade, and cotton accounts for almost all of the trade in natural fibres. The MPCs are among the Union's most important partners for trade in these products (Figure 12).

Natural fibres: cotton

In general, the European Union imports raw cotton and exports cotton fabrics. In value terms, fabrics clearly dominate the trade in cotton. In 2002 the MPC countries supplied nearly a quarter of the raw cotton imported by the EU and a third of the cotton thread, with the rest coming mainly from Asia and Africa (Figures 12 and 13). In the same year, they were the destination for a third of the European Union's exports of cotton fabrics.

Among the Mediterranean countries, Egypt, Syria and Turkey are well known as major producers of cotton. These three countries are therefore among the EU's five major suppliers of non-carded cotton and cotton yarn other than sewing thread. In the case of Egypt and Syria, they are the main textile products exported to the EU. Within the Union, only Greece and to a lesser extent Spain produce some cotton. This suggests that some of the European cotton fabrics which are exported are made from imported raw material, either raw cotton or yarn. The EU's main customers for cotton fabrics are Tunisia, Morocco and Turkey (Table 4).

Synthetic fibres

Overall, the European Union is a net exporter of synthetic fibres and filaments. In 2002 it exported to the MPCs 20% and 27% respectively of these products, with Turkey, Tunisia and Morocco accounting for 84% of the EU's exports. With regard to MPC exports of synthetic fibres to the EU, Turkey is virtually the sole supplier, with Israel accounting for a much smaller amount (Figure 14).

Table 4 - Main partners of EU for main cotton products traded in 2002 (HS 4)

Partners	EUR mio	% extra	Partners	EUR mio	% extra-EU
Main products exported			Main products imported		
Fine cotton fabrics			Cotton, not carded or combed		
EXTRA-EUR	1639	100	EXTRA-EUR	835.4	100.0
MPC-12	395	24	MPC-12	177.7	21.3
Romania	232	14	Uzbekistan	131.9	15.8
Tunisia	165	10	Syria	75.2	9.0
Poland	140	9	Egypt	57.4	6.9
Morocco	133	8	USA	55.4	6.6
USA	112	7	Australia	51.9	6.2
Thick cotton fabrics			Cotton yarn		
EXTRA-EUR	1568	100.0	EXTRA-EUR	932	100.0
MPC-12	822	52.4	MPC-12	312	33.5
Tunisia	365	23.3	India	174	18.6
Morocco	233	14.9	Turkey	151	16.3
Turkey	181	11.5	Egypt	83	8.9
Poland	138	8.8	Switzerland	70	7.5
Romania	137	8.7	Syria	64	6.8

Combined Nomenclature (CN) codes: 5201 - cotton, not carded or combed; 5205 - cotton yarn; 5208: Combined Nomenclature (CN) codes: 5201 - cotton, not carded or combed; 5205 - cotton yarn; 5208 - woven fabrics of cotton, weighing not more than 200 g/m²; 5209 - woven fabrics of cotton, weighing more than 200 g/m².

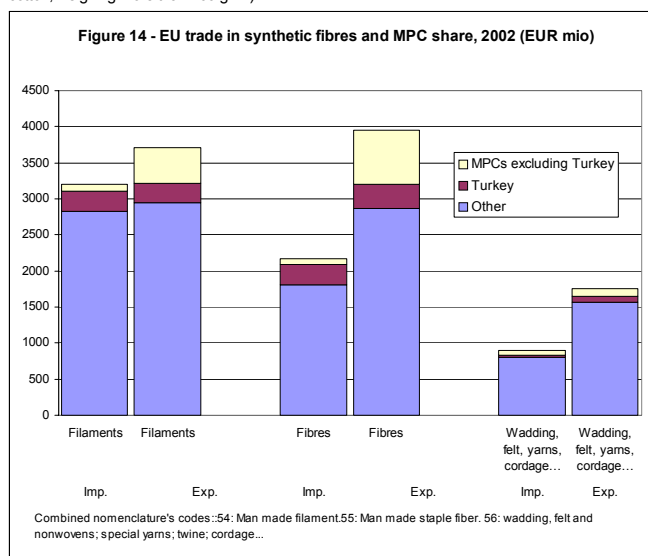
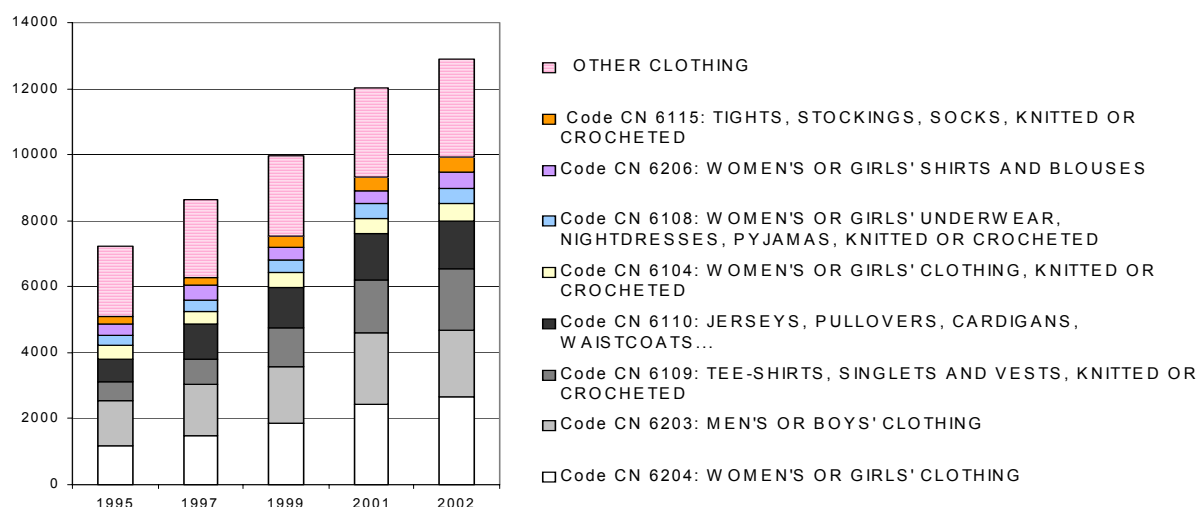


Figure 15 - EU imports of clothing from MPCs (EUR mio)



Europe's clothing imports

Four types of product accounted for 62% of the European Union's clothing imports from the MPC countries in 2002: men's and women's clothing other than knitted or crocheted, pullovers/jerseys and knitted or crocheted tee-shirts and singlets or vests (Figure 15 and Table 5).

Turkey, Tunisia, Morocco and Egypt together accounted for 95% of the textile products which the European Union imported from the MPC countries in 2002. Almost all the pullovers/jerseys, tee-shirts and women's clothing came from these countries, together with 91% of the men's clothing.

Turkey supplied the European Union with more than 70% of the tee-shirts coming from the MPC countries, with Egypt and Morocco accounting for 17%. Tunisia and Morocco were the source of about 60% of the clothing for women. Lastly, Morocco and Turkey provided 83% of the pullovers/jerseys.

A closer analysis of the MPCs which are most involved in this trade (Turkey, Tunisia, Morocco and Egypt) shows that European clothing imports cover a fairly narrow range. The first ten products account for half or more of all clothing imports (76% in the case of Egypt). Tee-shirts and men's and women's trousers are the main products which these four countries export to the EU (Table 6).

Table 5 - Main T/C products imported by EU from MPCs

		1995	2002	Variation
		EUR mio		95 / 2002
				Multipli.
MED 12				
Total T/C		9247	16295	1.8
6204	WOMEN'S OR GIRLS' CLOTHING	1195	2648	2.2
6203	MEN'S OR BOYS' CLOTHING	1340	2043	1.5
6109	T-SHIRTS, SINGLETs AND VESTS, KNITTED OR CROCHETED	575	1839	3.2
6110	JERSEYS, PULLOVERS, CARDIGANS, WAISTCOATS...	697	1465	2.1
Turkey				
Total T/C		4274	8964	2.1
6109	T-SHIRTS, SINGLETs AND VESTS, KNITTED OR CROCHETED	374	1314	3.5
6204	WOMEN'S OR GIRLS' CLOTHING	430	1200	2.8
6110	JERSEYS, PULLOVERS, CARDIGANS, WAISTCOATS...	478	989	2.1
Tunisia				
Total T/CH		1841	3115	1.7
6203	MEN'S OR BOYS' CLOTHING	546	706	1.3
6204	WOMEN'S OR GIRLS' CLOTHING	363	677	1.9
6110	JERSEYS, PULLOVERS, CARDIGANS, WAISTCOATS...	63	232	3.7
Morocco				
Total T/C		1733	2735	1.6
6204	WOMEN'S OR GIRLS' CLOTHING	338	712	2.1
6203	MEN'S OR BOYS' CLOTHING	382	466	1.2
6109	T-SHIRTS, SINGLETs AND VESTS, KNITTED OR CROCHETED	56	239	4.2
Egypt				
Total T/C		495	596	1.2
5205	COTTON YARN (OTHER THAN SEWING THREAD)	141	83	0.6
6109	T-SHIRTS, SINGLETs AND VESTS, KNITTED OR CROCHETED	46	73	1.6
6302	HOUSEHOLD LINEN	45	70	1.6
Israel				
Total T/C		453	366	0.8
5603	NONWOVENS, WHETHER OR NOT IMPREGNATED, COATED, COVERED OR	9	45	5.1
5402	SYNTHETIC FILAMENT YARN	31	42	1.4
6302	HOUSEHOLD LINEN	29	41	1.4
Syria				
Total T/C		177	271	1.5
5201	COTTON, NOT CARDED OR COMBED	89	75	0.8
5205	COTTON YARN (OTHER THAN SEWING THREAD)	7	64	9.0
6109	T-SHIRTS, SINGLETs AND VESTS, KNITTED OR CROCHETED	24	28	1.2
Malta				
Total T/C		138	170	1.2
6203	MEN'S OR BOYS' CLOTHING	89	128	1.4
6006	OTHER KNITTED OR CROCHETED FABRICS	0	13	-
6204	WOMEN'S OR GIRLS' CLOTHING	15	10	0.7
Cyprus				
Total T/C		99	51	0.5
5001	SILK WORM COCOONS SUITABLE FOR REELING	99	51	0.5
5002	RAW SILK (NOT THROWN)	30	20	0.7
5003	SILK WASTE	10	10	1.0
Lebanon				
Total T/C		21	14	0.7
6109	T-SHIRTS, SINGLETs AND VESTS, KNITTED OR CROCHETED	4	4	0.9
6302	HOUSEHOLD LINEN	0	2	9.3
6110	JERSEYS, PULLOVERS, CARDIGANS, WAISTCOATS...	1	1	1.2
Algeria				
Total T/C		2	3	1.5
5801	WOVEN PILE FABRICS AND CHENILLE FABRICS	0	1	3.6
5402	SYNTHETIC FILAMENT YARN (OTHER THAN SEWING THRED)	0	1	-
Jordan				
Total T/C		14	11	0.8
6203	MEN'S OR BOYS' CLOTHING	4	6	1.4
6110	JERSEYS, PULLOVERS, CARDIGANS, WAISTCOATS...	1	2	2.9
6103	MEN'S CLOTHING, KNITTED OR CROCHETED	0	1	7.0
Palestinian Auth.				
Total T/C		0	3	-
6307	OTHER MADE-UP ARTICLES	0	3	-
6302	HOUSEHOLD LINEN	0	1	-

Table 6 - Main clothing imported by EU in 2002 from four main MPCs

Tunisia				Turkey			
CN code	Description	EUR mio	%	CN code	Description	EUR mio	%
62034235	Men's cotton trousers	236	8	61091000	Cotton tee-shirts, singlets and vests	1035	15
62034231	Men's jeans	216	7	61159200	Women's full-length or knee-length cotton hosiery	399	6
62046239	Women's cotton trousers	192	7	61102099	Women's cotton pullovers, cardigans, etc	352	5
62046231	Women's jeans	138	5	62046239	Women's cotton trousers	323	5
61091000	Cotton tee-shirts, singlets and vests	108	4	61103099	Women's pullovers, cardigans, etc	288	4
Total 61 and 62 clothing		2879	100	Total 61 and 62 clothing		6720	100
First five products (%)		889	31	First five products (%)		2397	36
First ten products (%)		1298	45	First ten products (%)		3466	52

Morocco				Egypt			
CN code	Description	EUR mio	%	CN code	Description	EUR mio	%
61091000	Cotton tee-shirts, singlets and vests	189	7	61091000	Cotton tee-shirts, singlets and vests	71	26
62034235	Men's cotton trousers	188	7	62034231	Men's jeans	24	9
62046318	Women's trousers of synthetic fibres	150	6	61082100	Women's cotton briefs and panties	24	9
61103099	Women's pullovers, cardigans, etc	138	5	61071100	Men's cotton underpants and briefs	14	5
62046239	Women's cotton trousers	122	5	61051000	Men's cotton shirts	13	5
Total 61 and 62 clothing		2585	100	Total 61 and 62 clothing		269	100
First five products (%)		787	30	First five products (%)		146	54
First ten products (%)		1204	47	First ten products (%)		189	70

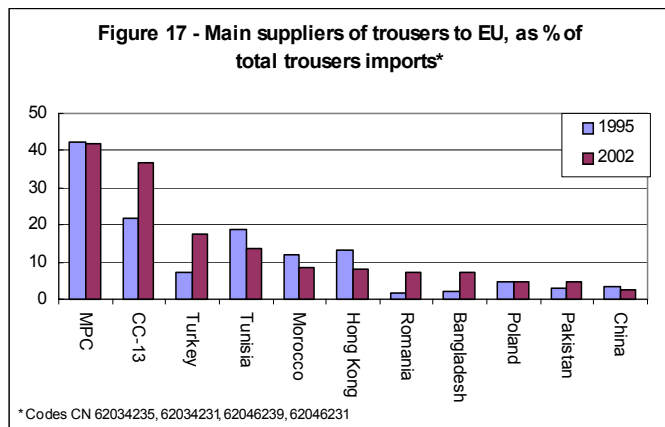
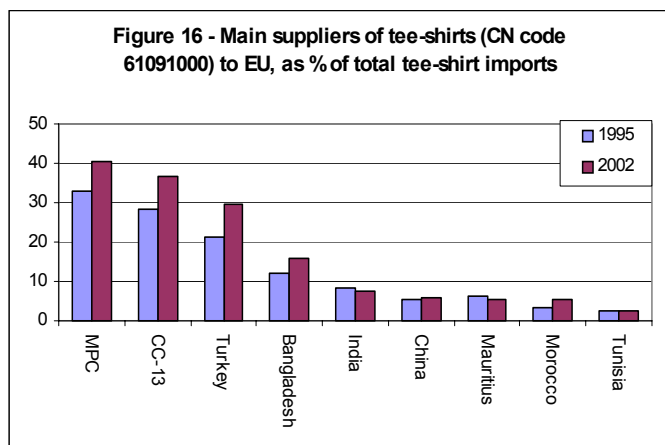
Competing with the MPCs in the European market: candidate countries and Asia

Countries clearly specialise: trousers for Tunisia, tee-shirts for Turkey and Egypt, trousers and tee-shirts for Morocco. Who are the European Union's other suppliers of these clearly defined products?

In the case of tee-shirts, the competition comes primarily from countries in Asia: Bangladesh, India and China (Figure 16). Together, these three countries supplied the European Union with about 30% of its tee-shirt imports in 2002, compared with a figure of 41% for the MPCs. China supplied only 5% of the tee-shirts imported by the EU in 2002, and the European market accounted for only 4% of China's total tee-shirt exports in the same year.

For trousers, the MPC countries are the Union's main suppliers. Turkey, Tunisia and Morocco accounted for 40% of the trousers imported by the EU in 2002 (Figure 17). Turkey considerably expanded its share of the European market between 1995 and 2002, while Morocco and Tunisia saw their share of the market decline. Romania and Poland are also among the EU's main suppliers, alongside several Asian countries (China, Hong Kong, Bangladesh and Pakistan).

The MPC countries' competitors in the European market, especially for tee-shirts, thus seem to come from Asia. However, the main factors favouring the Euro-Mediterranean region when facing up to international competition are its proximity, the quality of its products and its ability to respond quickly to changing trends in the sector.



ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Country aggregates: EU - EU-15; MPC-12 - Algeria, Morocco, Tunisia, Egypt, Jordan, Lebanon, Syria, Israel, Palestinian Authority, Cyprus, Malta and Turkey; Mashrek - Egypt, Jordan, Palestinian Authority, Syria and Lebanon; Maghreb - Algeria, Morocco and Tunisia. The figures for the Palestinian Authority refer to the

West Bank and the Gaza Strip.

Data sources: customs authorities; Eurostat COMEXT data; figures reported by the EU. **System:** special trade. **Classification:** Combined Nomenclature (CN). **Statistical values:** EU - CIF for imports and FOB for exports.

Other sources: the figures in Figure 3 are taken from the United Nations, as well as the figures for Israel in Table 1. The figures in Table 1 and Figures 5 and 11 were supplied to Eurostat by the countries' national statistical institutes.

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