

# Future Challenges of the European Textile Industry

The  
Voice  
of the  
European  
Textile &  
Clothing  
Industry

**Alberto Paccanelli**  
**President of EURATEX**

Association of the Austrian Textile, Clothing, Shoe and  
Leather Industry – Vienna - 11 October 2012

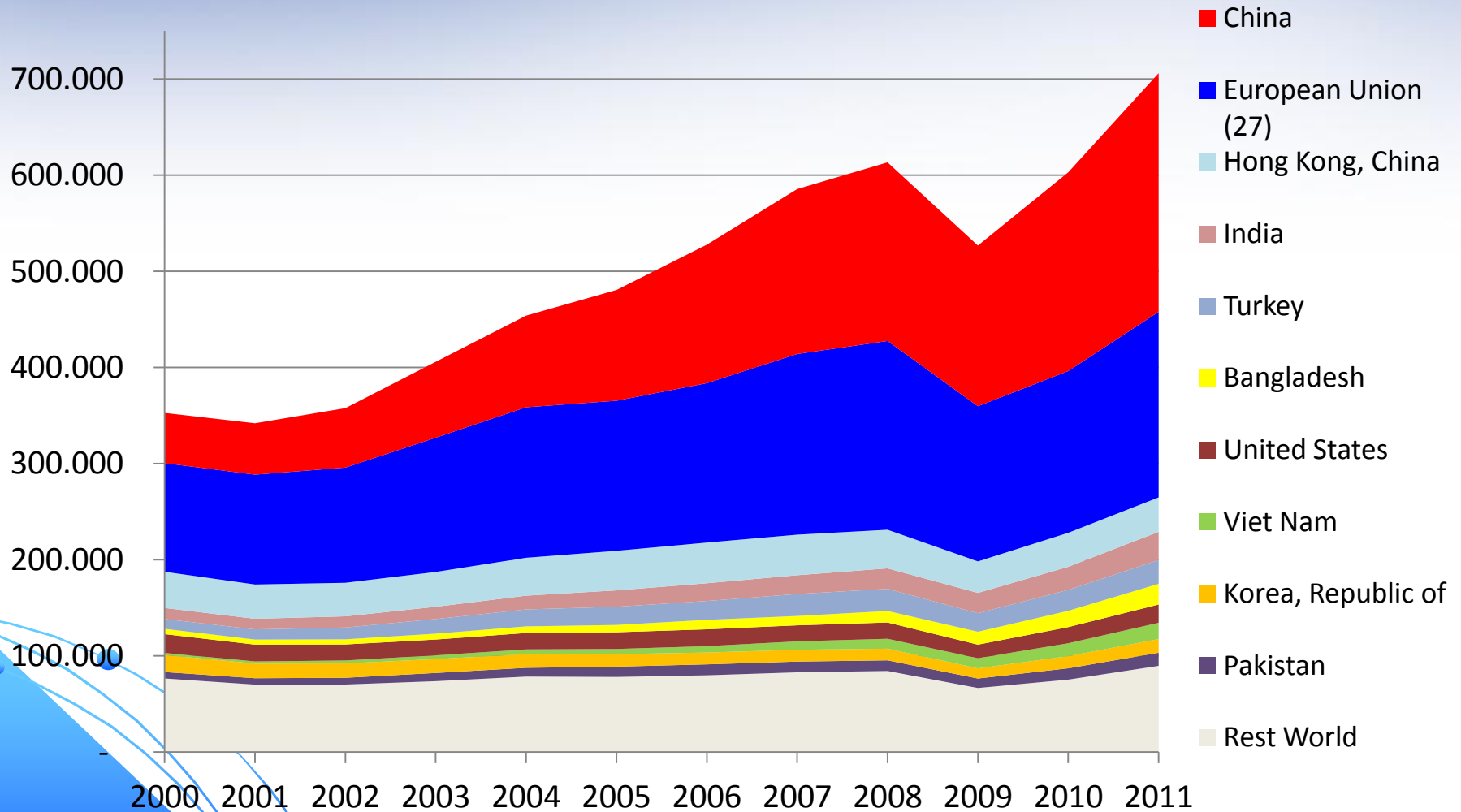


# OVERVIEW

- **The EU Textile & Clothing Industry Challenges**
- **Euratex & its mission**
- **Future Challenges & Vision**
- **EU Policies**
- **Euratex Strategy**
- **Conclusions**

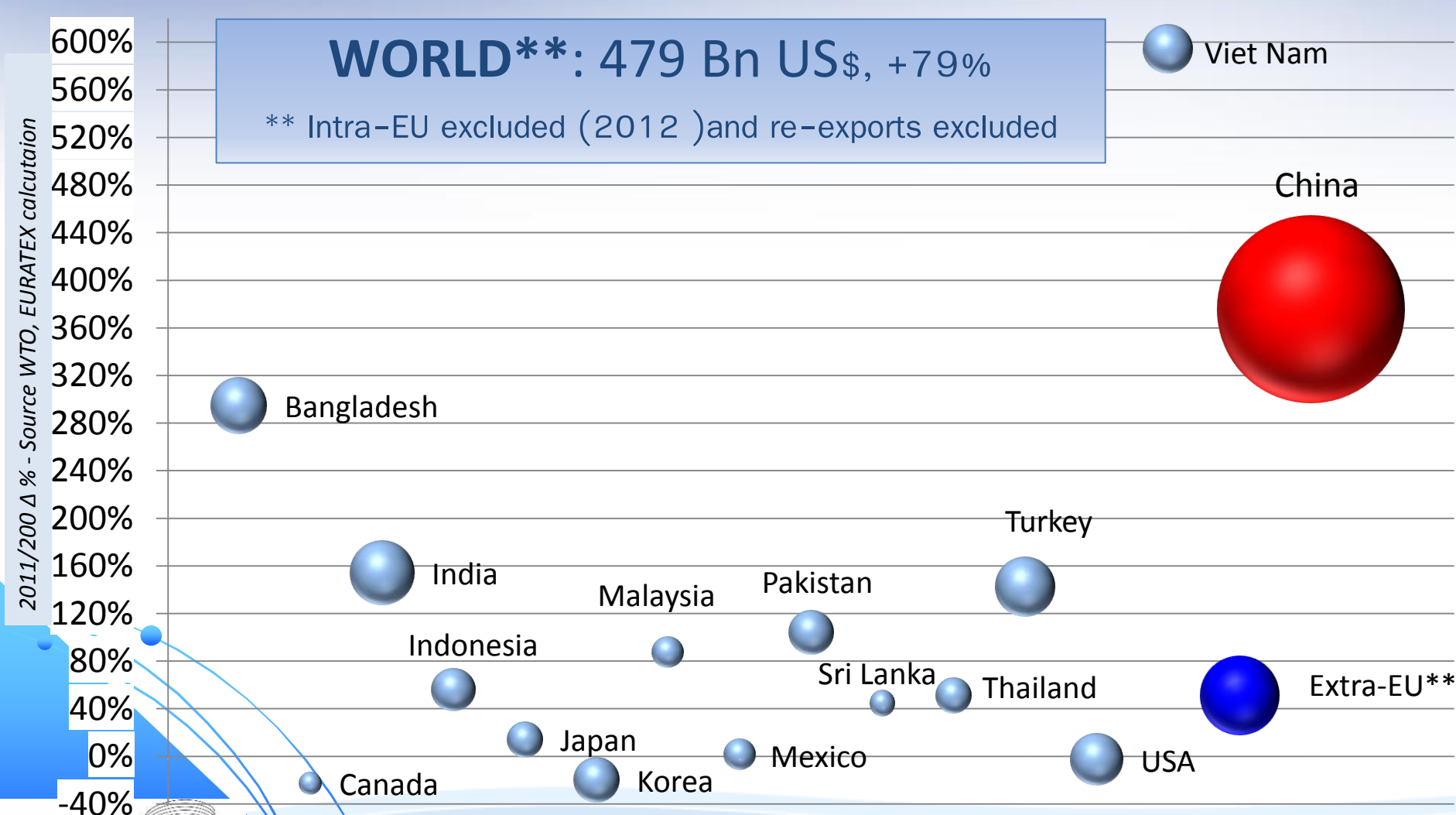
# WORLD TREND TOP 10 T&C

(WTO mil. USD Including Intra-EU and re-exports)

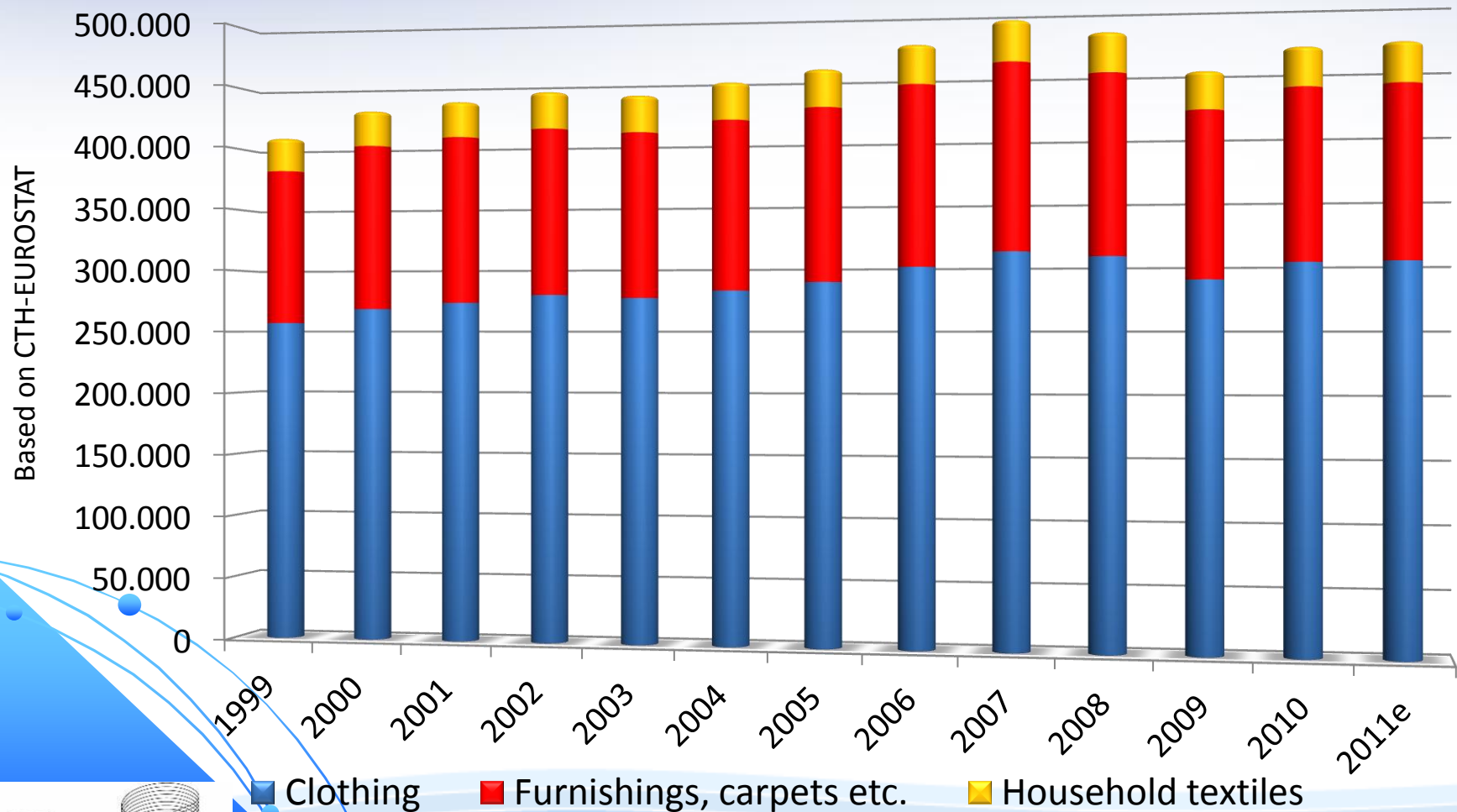


# Leading exporters of T&C

## 2000-2011 evolution



# Final households consumption expenditure by main market current prices-€



# KEY DRIVERS FOR THE FUTURE

## Positive drivers

- Innovation & technology development
- Global economic growth
- Export in fast growing markets
- Changes in consumption patterns depending on the societal challenges faced
- Possible relocation of sourcing → costs vs. flexibility/service
- New business models
- Resource efficiency

## Negative drivers

- International competition & WTO policy
- Access to third markets hampered
- Sluggish demand in Industrialized countries
- Energy/raw material costs
- Environmental regulation
- Euro crisis
- Non-respect of IPR
- Limited access to finance for SMEs'

# THE CHALLENGES



**Progress on all 7 challenges to ensure international competitiveness and sustainable growth of the industry**

# Strengths & Vision

- Free & open market conditions
- Creative solutions to other sectors

**DO BETTER**

Highly competitive

Knowledge based Industry

- Innovation, Creativity, Quality
- Skills & Technical competences

Market Consciousness

Efficient manufacturing, distribution chain

- Constant development of new business models
- Market proximity

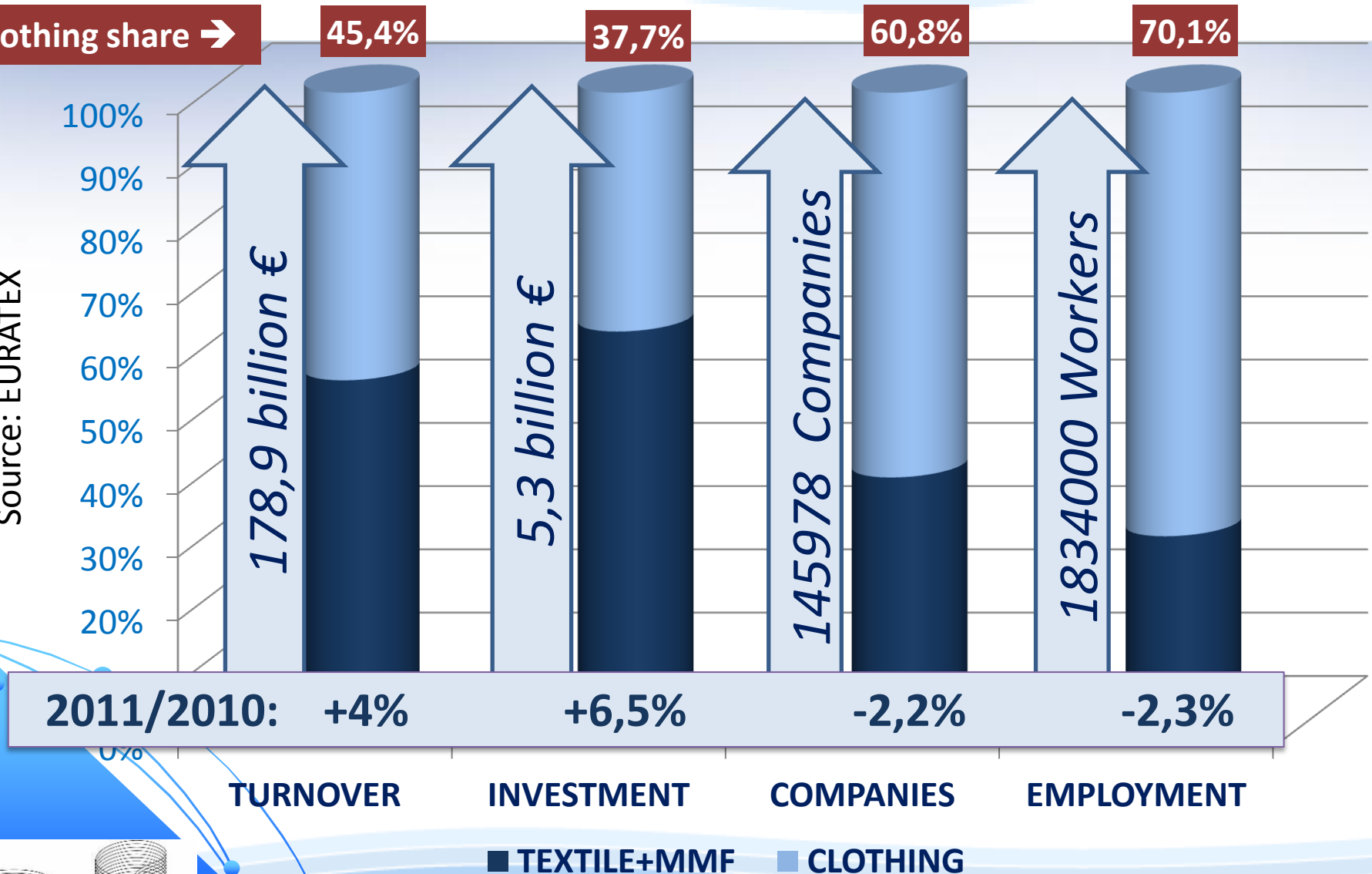
**DO MORE**

- World leader: Fashion & Technical Textiles
- Flexibility, design capability & service orientation

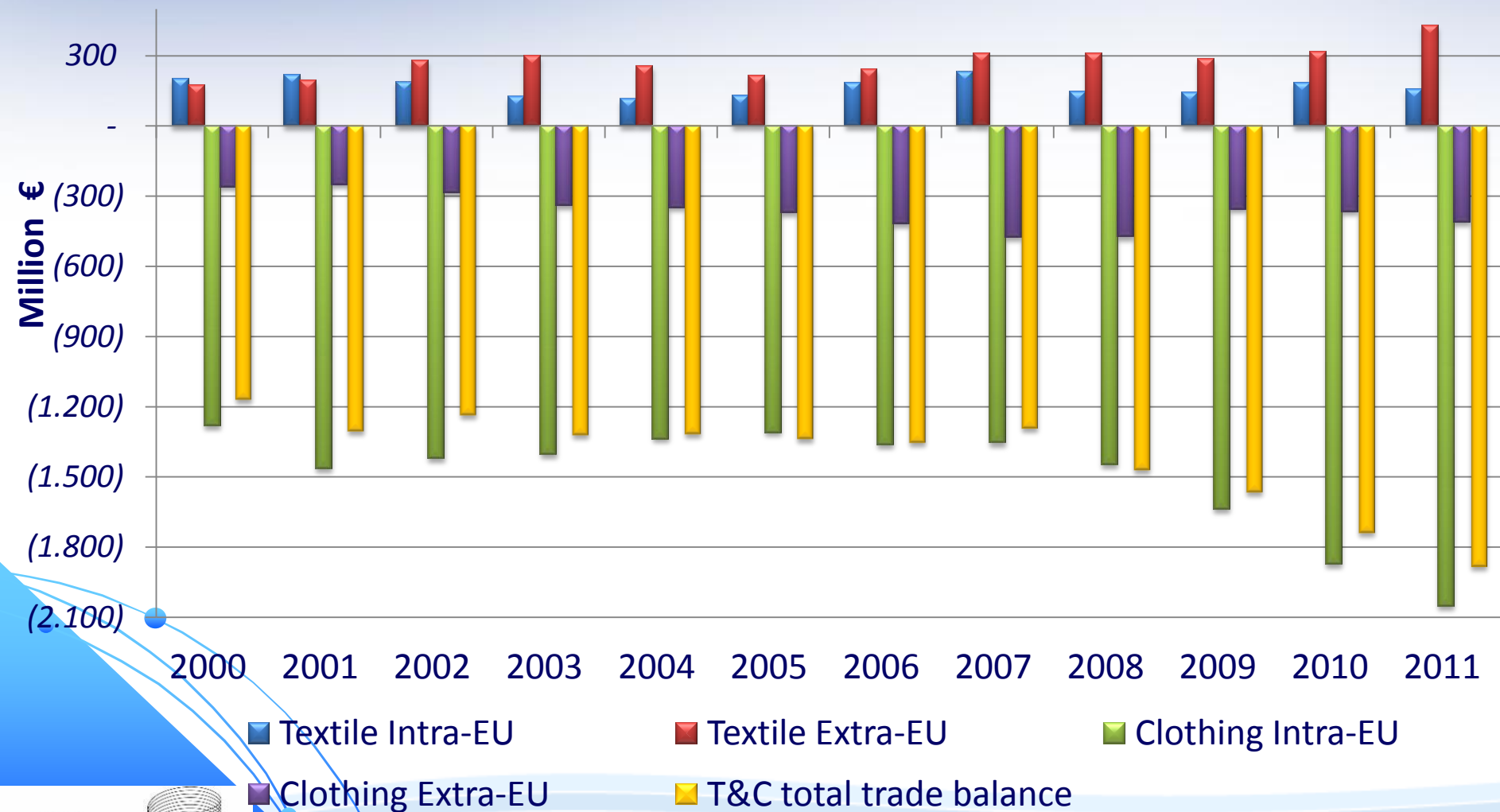


# T&C importance in the EU Value Chain 2011

Source: EURATEX



# Austrian Textile & Clothing Trade Balance



# EURATEX'S MISSION

- **Promote** the interests of TC Industry
- **Acts** on behalf of the industry with European and International institutions
- **Coordinates** the strategies to support the industry's performance
- **Strengthen** the international competitiveness of the industry

Euratex established in 1996

48 member associations from 28 countries

Based in Brussels, 10 employees

# EURATEX MEMBERS

- AUSTRIA
- BELGIUM
- BULGARIA
- CROATIA
- CZECH  
REPUBLIK
- DENMARK
- EGYPT
- ESTONIA
- FINLAND
- FRANCE

- GERMANY
- GREECE
- HUNGARY
- ITALY
- LATVIA
- MOROCCO
- NETHERLANDS
- NORWAY
- POLAND

- PORTUGAL
- RUSSIA
- SERBIA
- SLOVENIA
- SPAIN
- SWEDEN
- SWITZERLAND
- TURKEY
- UNITED KINGDOM

## EUROPEAN BRANCHES

- AIUFFASS
- C.E.L.C.
- CIRFS
- EATP
- ECRA
- EDANA
- EUROCORD
- EUROCOTON

Integrated members:

Clothing, Knitting, Finishing  
& Wool Industries

# EU POLICIES - FRAMEWORK

## Europe 2020

- *Knowledge – Growth - Sustainability*

## Industry

- *An integrated industrial policy for the globalization era*

## Innovation/R&D

- *Innovation Union / Horizon 2020*

## Trade

- *Trade, Growth and World Affairs*

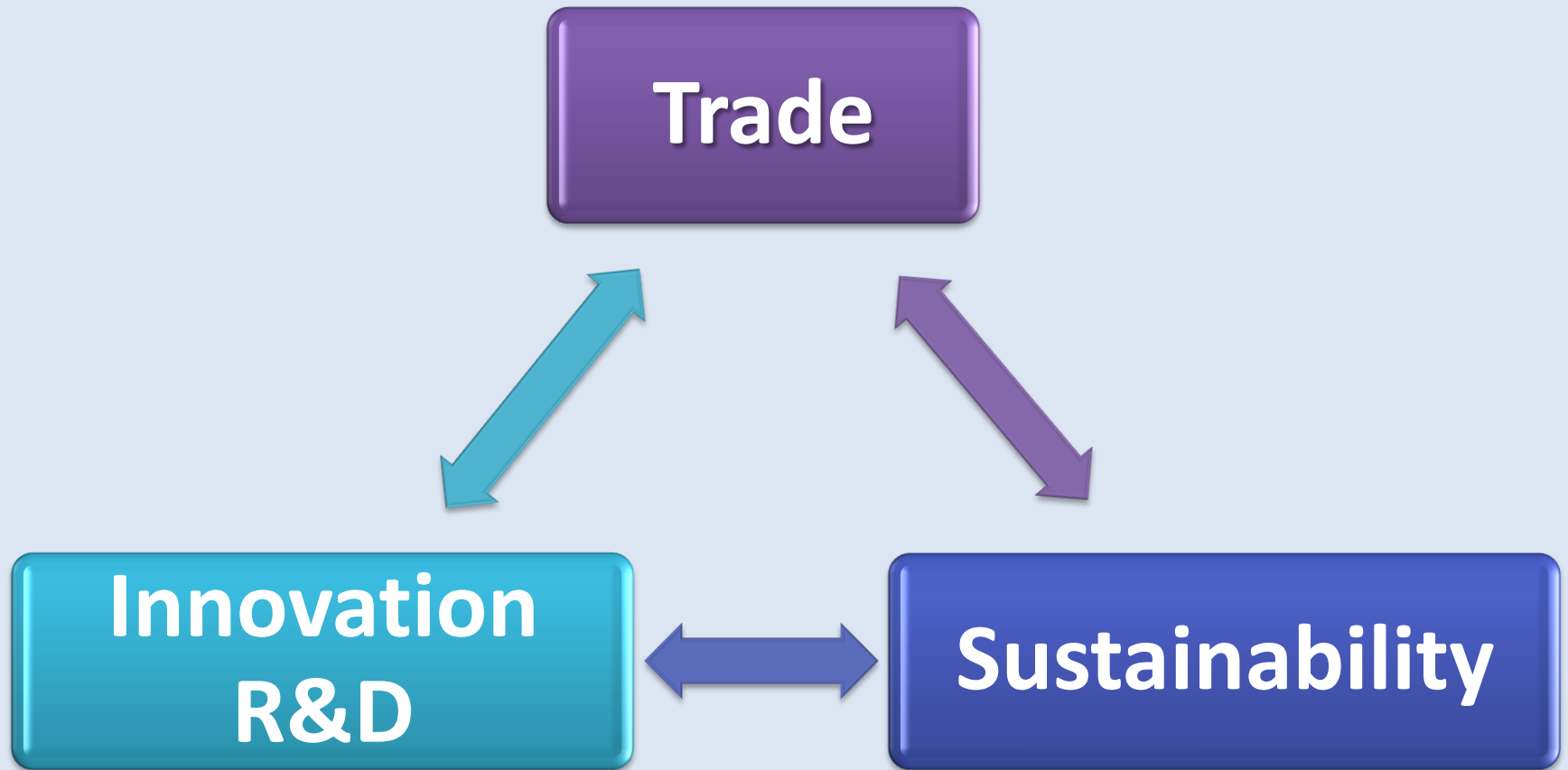
## Sustainability

- *A resource-efficient Europe*

## Ethical responsibility

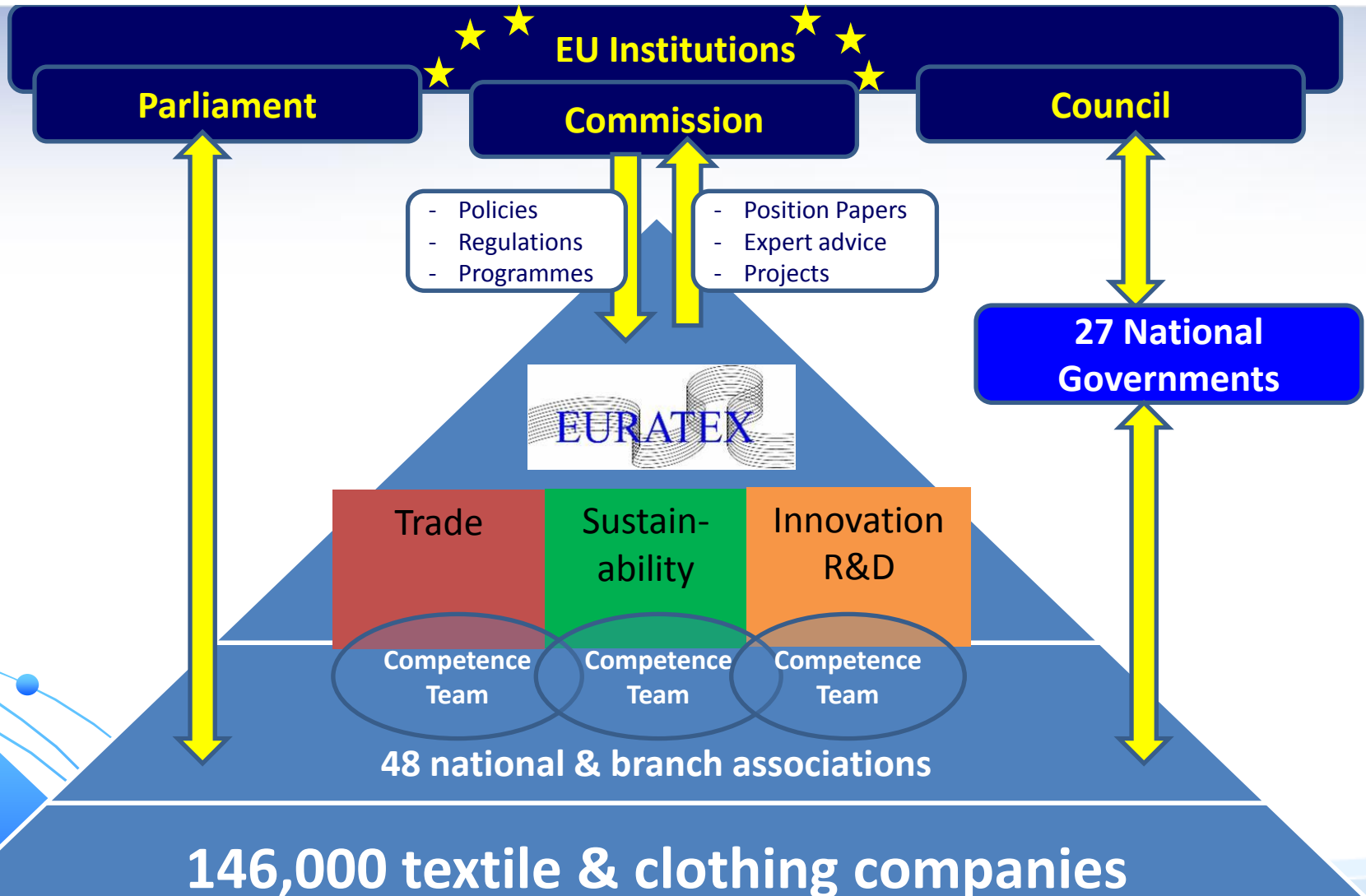
- *Agenda for new skills and jobs*

# EURATEX PILLARS



**Key role of multidimensional and coherent actions  
at EU, national and regional levels**

# EURATEX 2020 - ORGANISATION



# EURATEX 2020 strategy & objectives

## Strategic areas

1. Trade and Markets
2. Innovation and R&D
3. Knowledge, Skills & Training
4. Sustainability
5. Environment & energy
6. Social
7. Internal Market & Regulatory Framework

## EU T&C Industry Objective

1. Promote Free, Fair and Sustainable Trade
2. Create a favourable environment that promotes investments in R&D.
3. Facilitate transition to a Knowledge driven industry
4. Promote & support sustainable Industry effectively and efficiently
5. Human resources: a key driver for EU industry competitiveness
6. Promote the creation of a truly free EU Internal Market



# Action Plan

AREA	LEADER	EURATEX support and coordination
Project leader	Alberto PACCANELLI	
<ul style="list-style-type: none"> <li>• Trade &amp; Markets</li> </ul>	Serge PIOLAT Bulent BASER	Luisa
<ul style="list-style-type: none"> <li>• Internal market &amp; regulatory framework</li> </ul>	J.-F. GRIBOMONT Sven GATENHEIM	Luisa
<ul style="list-style-type: none"> <li>• Innovation, R&amp;D, Education</li> </ul>	Dick HENDRIKS Klaus HUNEKE	Lutz
<ul style="list-style-type: none"> <li>• Social (dialogue/vocational/codes)</li> </ul>	Hadi KARASU Franco GHIRINGHELLI Juan CANALS	Stéphanie
<ul style="list-style-type: none"> <li>• Environment (incl. Energy)</li> </ul>	Joao GUIMARAES Paolo PIANA	Adil
<ul style="list-style-type: none"> <li>• Sustainability</li> </ul>	Reinhard BACKHAUSEN	Francesco
<ul style="list-style-type: none"> <li>• Communication &amp; Revenues</li> </ul>	Peter SCHWARTZE Pino PREZIOSO	Roberta
<ul style="list-style-type: none"> <li>• Organization &amp; Governance</li> </ul>	Alberto PACCANELLI	Francesco

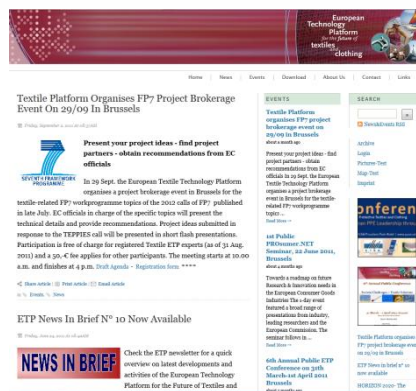
# Proposed Process

11th May 2012	Principles
14th June 2012	Recommendations GA
September	Proposal ST & IR
October/November	Discussion Board & DG
16th November	1st EURATEX Convention
December 2012	Extraordinary GA

# THANK YOU FOR YOUR ATTENTION!

Learn more about Euratex:

[www.euratex.eu](http://www.euratex.eu)



The screenshot shows the website for the European Technology Platform. The main headline is "Textile Platform Organises FP7 Project Brokerage Event On 29/09 In Brussels". Below this, there is a section titled "Present your project ideas - find project partners - obtain recommendations from EC officials". The text describes a project brokerage event on 29/09 in Brussels, where project ideas will be presented to EC officials for recommendations. It also mentions a "NEWS IN BRIEF" section and a "Check the ETP newsletter" link.

European Technology Platform  
for the Future of Textiles & Clothing

[www.textile-platform.eu](http://www.textile-platform.eu)



The screenshot shows the Euratex website, "The European Apparel and Textile Confederation". The main headline is "Euratex to speak at EE event 'The policy seminar...' on 26-27 October in Warsaw". Below this, there is a "Latest News" section with a link to "Lead Market Outlook for Europe". There is also a "Members area" link at the bottom.

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