

Barcelona Treball

Textile industry

Sector Report 2013

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The 10 keys to understanding the sector

In recent years, the textile industry has been convulsed by changes. The new setup of the markets and the incorporation of new technologies affecting the management, production, distribution and logistics processes are critical factors in this situation.

The sector

The textile industry is made up of a series of inter-related processes, whose purpose is to create different products for clothing and industry. The industry includes whole process from obtaining primary materials to distributing the end-product to consumers and, traditionally, has been characterised by weak demand, low technology content and a labour-intensive production process. The industry has evolved over years of restructuring and witnessed the reorientation of its activities, the most important aspects of which are: the transformation of the commercial structure; product diversification; continuous changes in materials; and the optimisation of distribution and logistics.

Main areas of activity

The textile industry includes a wide range of activities, from production of fibres and items of clothing, to distribution of the end-product to the consumer. The complete textile cycle is made up of the production of natural and man-made fibres, the traditional textile industries (spinning, weaving and finishing textiles), and the clothing industry. The market is split between three broad groups of products: clothing (approximately 50% of total consumption), textiles for the home and decoration (30%), and textiles for technical or industrial use (20%).

Trends

All areas of the industry, especially garment making, have been affected by increased competition from emerging countries whose competitiveness is based on low labour costs. However, seems that Catalan fashion brands and European in general are realizing that producing abroad is not as cheap as before, and confirm that there is a tendency to return production closer. It is basically a matter of costs, but companies are noting the great potential and added value of having a product made in Europe. Another factor of great importance to the industry is the progressive concentration of commercial distribution and its commitment to international marketing and supply policies.

Economic importance

In Catalonia, the activity of the textile and clothing industry slowed during 2011, reflecting the deterioration in the economic environment. Production fell -0.7%, however, the sector still holds a prominent weight in the Catalan economy, accounting for 4,4% of Gross Value Added (GVA) and 7,3% of the employment of Catalan industry.

Employment

In the industry there is a large number of small businesses, 2.900 existing companies in 2011, and 90% employ less than 5 people. The restructuring of the sector had effects on companies size, the largest companies had been more affected by this restructuring, which resulted in a reduction in the size of the business sector; so textile companies with more than 50 employees represented 5% in 2000, while currently do not reach 3%.

Professional profiles most in demand

The future of the industry depends on its ability to reorient itself towards high value added activities. Currently, traditional garment making is making way for technical-textile production, textiles research is gaining importance, and increasing use is being made of new technologies applied to textile products and processes. In this context, qualified technical personnel who know about innovations in materials and production processes are becoming a key factor for success.

Occupations most in demand

The textile industry has seen itself obliged to restructure the way it operates to remain competitive and this has led to the increasing importance of certain activities, in particular distribution and logistics which are strategic differentiating factors. This means that qualified logistics and storage staff are extremely important in the development of new business policies. Research is also expected to provide more jobs, although this may be hindered by how resistant and slow the sector is at implementing textile innovations.

Future scenarios

In the future, the industry will have to be able to adapt to its changing situation. The competition strategies most appropriate to achieving this involve diversification and differentiation through entry into new fields such as technical textiles, using new technologies and e-commerce, etc. To meet these new challenges, it is necessary to adapt professionals' technical training, as well as bringing companies closer to technology centres and universities.

Weaknesses

Greater competition from emerging economies and their increased exports to Europe following trade liberalisation combined with the declining competitiveness of the sector in Europe because of high production costs, especially wages, constitute the main causes of the decline that Catalonia's textile industry is suffering. In addition, the situation has become worse because of the lack of access to credit brought about by the global economic and financial crisis.

Opportunities

Despite the difficult situation in certain areas of the textile industry, there are some interesting possibilities that might generate business opportunities. They include using technology as a strategic resource (especially in terms of e-commerce), improving product image, reorientation towards technical textiles, specialised distribution and internationalisation.

01 Introduction to the sector

The textile industry has traditionally played a very significant role in the productive systems of all the developed countries and specifically in Europe and Spain.

However, it has also been one of the economic activities most affected by the intensive reorganisation and restructuring processes of recent decades, caused by rapid changes in the characteristics of demand and market behaviour, as well as by competition from new producer countries.

The industry was one of the leading engines of the economy until the 1960s, but has been losing importance in the structure of Catalan industry because of other sectors' more dynamic growth and because of the profound transformation that the textiles industry itself has been undergoing, particularly the globalisation of its activities.

To demonstrate this point, the industry accounted for 8.7% of industrial production in 2000 but by 2010 this figure had fallen to 5.2%.

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Main areas of activity

The textile and clothing industry includes a series of industrial activities that, from top to bottom of the production chain, are the manufacture of man-made fibres, raw cloth (spinning, weaving and finishing textiles), other types of textile manufacture (carpets, nonwovens, etc.), making clothes and, finally, making textiles for the home. The stages higher up the textiles chain are essentially capital-intensive, while clothing is more labour-intensive.

The end of the industry's production chain is distribution, which is not a manufacturing activity *per se*, but has increasingly close ties with the industry. Below is a description of the above activities:

Man-made fibres

The area of man-made fibres is the start of the textile value chain. It is dedicated to manufacturing fibres that do not occur naturally, whether from oil-derived monomers (synthetic fibres) or by treating cellulose (artificial fibres). The result or final product is the fibres subsequently used in the spinning process.

Raw cloth

This refers to spun, woven and finished textiles, and is the basis of the textile chain. The spinning process consists of processing fibres into yarn using the spinning processes and machines appropriate to each fibre. Weaving consists of processing a series of yarns into a smooth surface (the fabric); the result can be either warp-and-weft, or full-cardigan fabric, depending on the process followed. Finally, during the finishing process, chemical and mechanical processes are applied to the fabrics to give them their final appearance (bleaching, dyeing, printing, etc.).

Clothing

The clothing industries are knitted fabrics and garment making. Garment making is the process by which fabric is turned into an item of clothing or knitwear, for use and sale. It includes all activities relating to cutting and joining pieces of weft fabric, knitwear, leather and fur.

Distribution and logistics

This area covers from supply management to transportation and distribution of finished garments.

In addition to the previous characterisation, the industry could be classified more traditionally, on the basis of the primary materials used and the corresponding technology. In this case, a distinction is made between the areas of cotton, wool, silk, dyes and finishes, etc. Although technological developments in the market are rendering classifications by primary material less suitable, the fact remains that many business associations and institutions continue to use them, as do many studies and statistics.

Finally, the industry can also be classified from the perspective of the labour market, by identifying various areas in which different types of professional profile can be found. The following are the main areas of the industry that have been identified:

Garment design and making

This includes all occupations related to designing clothing, as well as the processes involved during the stages of making it. Design is an activity that adds value to a product and is one of the industry's most important options. Fashion designers deserve special mention here, as do graphic designers specialising in textiles.

Buying, storage and distribution

Distribution has been becoming increasingly important in the textiles industry and is now one of its most strategic activities. This area needs profiles such as purchasing managers and logistics coordination managers.

Management of productive processes

The new configuration of textile markets and the incorporation of new technologies are significantly affecting management, production, storage, distribution and logistics processes. To respond to these changes, profiles such as integrated management system managers, production process and time analysts and textile consultants are needed.

Marketing and point-of-sale management

This is an area of great importance in the introduction of non-traditional activities. Professional profiles with strategically important knowledge who could play a key role in developing companies' future plans are needed. Fashion product managers and commercial expansion specialists are particularly important within this group.

Technical textiles

Innovation in processes and products has been gaining importance in the textile industry, to the extent that there is now a clear tendency to focus on technical textiles and there is an area fully dedicated to this activity. Textile research experts and assemblers of technical textiles are particularly important in this area.

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Sector trends

The importance of process and product innovation and the search for new, alternative lines and hence new market niches has stepped up the inclusion of technologically advanced materials and an orientation towards technical fabrics.

Restructuring of the companies making up the industry

The restructuring of the sector in recent years has hit firms with more than 50 workers most so that in 2011 they account for only 2% of companies, down from 5% in 2000. The reasons for this are the family origin of most businesses (94% of the 4,998 companies in the textile, garment, leather and footwear sector in Catalonia have fewer than 20 workers), the better adaptation of this type of business to changes in the textile market and the industry's geographic concentration which favours interrelationships between companies. However, there are also a large number of freelance employers who provide an important range of ancillary activities for the sector.

Innovation and design as factors for survival

The evolution of foreign trade and competition from emerging markets have forced Catalan companies to differentiate themselves in order to ensure their adaptation to and survival in their environment. The key points in this strategy are innovation, especially in design and materials used, and improving production and logistics processes to optimise costs and be able to respond quickly to the market's requirements. Furthermore, distribution is increasingly linked to the industry because the centre of gravity of the chain has shifted from production to consumption, and hence distribution, the last link in this chain, has been gaining importance and absorbed industry functions.

Short circuit distribution: decisive for textile sector

The sector's ability to respond to new trends in fashion will be related to the development of an efficient distribution logistics system. In this regard, it should be noted that the textile distribution has undergone profound changes in recent decades as a result of globalization and the advent of information technology, and the fact that fashion trends can change in a matter of weeks depending on the clothes of an artist at a concert, the success of a social movement, etc. Therefore, the products are increasingly ephemeral and term between demand and delivery is very short .

This transformation has resulted in a reduction of the distance between the companies involved in the design process, manufacturing and selling garments. This change has reduced the time between the design of a piece and its arrival at the store. This is called short circuit distribution.

To achieve this, the largest fashion companies, for example, have designed their own distribution processes based on logistics systems that incorporate ICT and allow the distribution of many pieces per hour to interconnect suppliers, logistics platforms and points sales. SMEs seek more affordable alternatives and, in this sense, are spreading, for example, transportation companies specializing in textil logistic.

Adapted business models

The need to adapt to new socio-economic conditions and increasing global competition have forced companies to adopt new business models in which the entire production chain revolves around the consumer. This means a shift from a supply-based model (production was determined by industry) to another run from the standpoint of demand (where consumer preferences, satisfaction and retention are key strategic factors that determine textile production and distribution). Hence the new strategies that advocate the new concept of service company (as opposed to the traditional concept of factory company) point toward the integration of the production and distribution chains, even though the former may be geographically far removed from the latter. It is important to streamline the costs of the production structure, relocating it if necessary, while bearing in mind the product's distinguishing aspects in terms of design, logistics and marketing, which are very close linked to the market reality of a geographical area.

Reorientation towards new activities and products

Faced with a situation of permanent competition where modernisation and the introduction of new technologies are key to the modernisation and differentiation of the sector, textile companies have begun to enter new market niches, especially in technical textiles intended for sports, the automotive industry, health, building, safety, etc. In addition, for

the first time, manufacturers of fibers take into account issues such as improving the quality of life of consumers and respect the environment. So, if 40 years ago innovation in textile fibers was focused on improving its functions (resistant fibers and softer touch), nowadays innovations is related to fire-resistant fibers with functional additives, greener, recyclable, smart, with electronic fusion, or improves on breathability and waterproofing, for example.

However, although the demand for these products is increasing, this trend does not translate in the creation of work methodologies between research centres and private companies in order to promote synergies arising from research. It is true that exist a little approach between them, and they have started research on fusion of electronic textiles, special textile devices for sportswear, dyeing ecological systems with antibacterial properties, or tissues termoregulables, among others.

The re-industrialization of textil and the value of 'made in USA'¹

The textile sector bets for the internationalization of companies, and has a clear business strategies related to innovation and exports, the key to the survival of the sector. However, for some time, Catalan and European fashion brands in general are realizing that producing abroad it is no longer as cheap as before and confirm that there is a tendency to return production centres closer. It is not only a matter of costs -because in China, although manufacturing it is not so cheap as before, is still cheaper- but companies are noting the great potential and added value of having a product made in Europe. In this sense, some studies show a trend that values the social quality of the product. It has to be taken into account the functional aspects of textiles, sustainability, the origin of the raw materials used, etc. I.e., there is a return to legitimize the brand through intangible know-how.

Innovation, reorganization and emerging professional profiles in the sector²

SMEs in the textile and clothing apparel are forced to adapt to new market changes: flexible organizations with its own marketing and new methods of work organization, adapting the products and services they offer, and changing and adopting new forms of production and delivery to market. These changes will have a significant impact on employment in the sector and its contents. A recent study on training needs arising from the implementation of organizational innovations in the textile sector highlights, include some profiles, like designer of pieces, technical textiles-clothing and pawn of the textile-clothing industry, that presented good employment prospects. Between 2010 and 2011, the occupations that present more growth monthly and annual of contracts were: machine operator to prepare fibers, spinning and winding; machine operator to prepare looms and other machines; and machine operators to manufactured textile goods not classified in other epigraphs. In addition, the study highlights the emergence of two new vocational qualifications in textile and clothing related to the field of quality control and logistics: the quality control of textile and leather products and technical assistance to the logistics process outsourcing textile, leather and clothing.

¹L'Econòmic / September, 22. 2012.

²Observatory of Industrial Sector Textile. Training needs arising from the implementation of organizational innovations in textiles and clothing. December 2011

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The sector in figures

Economic data

- In the EU, the textile production fell by 2,6% in 2011, while in Clothing the reduction was double (-5.3%)³.
- In Spain, the industry's production level achieved in 2011 is 40.8% below 2005. This trend has affected equally textiles and clothing, although the fall in the latter has been more intense⁴.
- The progressive reduction in demand, especially in the second half of 2011, had a negative impact on the production sector, which fell by 7,4% compared to the previous year and reached levels that are still below 2008, when was the highest point of the expansion of the world economy. Again, the behaviour of clothing is more negative (-12,2%) than in textil (-2,4%), indicating a greater involvement of the crisis in this activity due to the structural changes that have affected since the first years of this century⁵.
- Imports grew by 34,7% between 2005 and 2011, while exports did it in 49,1%. In both cases clothes are the products that show greater dynamism and account for 78% of imports and 70% of exports⁶.
- A commitment to the internationalization of many textile-fashion companies in the first quarter of 2012 has led them to bill €3.875 million abroad: 1.862.000 is from the manufacturing sector. Inditex, Mango and Cortefiel are in the top of the list of firms with more international projection. Thus, if in 2011 the sales turnover of companies abroad exceeded €13.537 million, in the first quarter of 2012 has not lagged behind, and has increased 11,8% compared to the same period last year⁷.
- Exports of textile/clothing maintain its dynamism in the first half of 2012, an increase of 7,5%⁸.
- The textile/clothing accounted for 3% of industrial output and 5,9% of industrial exports in 2011⁹.
- By continent, Europe is the main destination of exports of Spanish fashion and accessories, where was billed in the first quarter of 2012, €2.874 million. Far away, follows Asia with €448 million, and America, with sales of around €300 million. Africa has successfully opened to the Spanish fashion, recording purchases of more than €239 million in the first quarter of 2012¹⁰.
- Exports that have increased more are of non-European markets, although Europe remains the main customer because receives almost 70% of total exports. By country, the main customers are France, Portugal, Italy, Morocco and Germany, representing almost half of foreign sales¹¹.
- The sector's trade balance remains in deficit (€5.293 million euros in 2011), representing a decline of 7,6% over the previous year¹².
- The R&D spending in 2010 fell more than 10% compared to 2009, this decline was more pronounced in the clothing industry (CNAE 14) than in the textile (CNAE 13). In absolute values the entire textile/clothing activities invested €75,8 million in R & D (2010)¹³.
- In Catalonia, the activity of the textile/clothing slowed during 2011, reflecting the deterioration in the economic environment. In this sense, the production fell -0,7%. However, the sector still has an important weight in all Catalan industry accounting for 4,4% of Gross Value Added (GVA) and 7,3% of employment¹⁴.

³Annual industry report in Catalonia in 2011. Generalitat of Catalonia. Department of Companies and Employment. June 2012.

⁴Conclusions of the Observatory of Industrial Sector Textile. Indicators 2011.

⁵Conclusions of the Observatory of Industrial Sector Textile. Indicators 2011.

⁶Conclusions of the Observatory of Industrial Sector Textile. Indicators 2011.

⁷Institut de Comerç Exterior (ICEX)

⁸Information Centre Textile and Clothing. Industry data in 2011. News 14/9/2012. <http://www.cityc.es/>

⁹Information Centre Textile and Clothing. Industry data in 2011. News 04/25/2012. <http://www.cityc.es/>

¹⁰Institut de Comerç Exterior (ICEX)

¹¹2011. Assessment of the textile/clothing. Information Centre Textile and Clothing, February 2012.

¹²Conclusions of the Observatory of Industrial Sector Textile. Indicators 2011.

¹³Conclusions of the Observatory of Industrial Sector Textile. Indicators 2011.

¹⁴Annual industry report in Catalonia in 2011. Generalitat of Catalonia. Department of Companies and Employment. June 2012.

- Catalan exports sector represents 38% of total exports of the sector in Spain in 2011¹⁵.

Employment data

- In 2011, in the EU sector, employment showed a softer decrease in comparison to the previous year (-2,5% versus -7,2% in 2010)¹⁶.
- The fashion industries in the EU are employing a relatively high proportion of women. Thus, while women represent approximately 45% of total employment in the EU, in the manufacture of garments, this proportion is 80%¹⁷.
- In Spain, employment in the sector is more than 50% less than in 2005. Both the slow evolution of the sector, as the indefinite duration of the crisis situation in general, suggest that the trend may continue in loss of activity and employment¹⁸.
- In 2011, employment in the sector has decreased by 5%, which represents an improvement in relation with 2010 reduction (-11%). Also, the temporal activity profile shows stability in the first three quarters of 2011, and sharp drop in the last year¹⁹.
- Taking like a reference 2009, 2010 and 2011, the lowest number of employees in the textile sector is fixed in the first half of 2010, although there is a slight increase in late 2010 and the first half of 2011. In the garment/clothing sector also seems that in the early 2010 the least number of employed people is reached, and, conversely, not seen an increase in the wage data in 2011²⁰.
- The textile/clothing accounts for 6% of employment in manufacturing industry in Spain²¹.
- According to the Labour Force Survey (EPA) of National Institute of Statistics (INE), the sector employed 116.600 people in Spain in 2011²².
- The textile and clothing apparel activities have accumulated 101.788 new contracts between January 2009 and September 2011. Most of these contracts come from the manufacture of garments (68%)²³.
- In the textile sector there are 6.649 companies employing 53.425 workers, and is highly concentrated in Catalonia (43% of employment) and Valencia (30% of employment)²⁴.
- Between 2010 and 2011, the census of the business sector in Spain has fallen by 1.199 companies, two thirds correspond to clothing companies. Thus, the census has declined by 33% between 2005 and 2011. This reduction is similar to the textile and clothing industry. However, the decline in the number of companies has been more pronounced between the largest (more than 100 employees)²⁵.
- In 2011, there was an improvement in the rate of salaried ((salaried working population/working population)*100) which has increased (+6,48%) essentially by the influence of the textile activity. But there have been, however, a reduction in the levels of female employment (-22,00%) with a negative influence by manufacturing activities. Reduction is also continuing (-1,98%) in the group of immigrants, especially in the textile activity²⁶.
- Regarding Employment regulation files in 2011, suspension and reduction files have been reduced (-85,21%), and extinction (-28,33%) too. It also has been reduced the number of workers affected by the suspension (-89,18%) and the extinction (-76,84%)²⁷.
- In the textile industry in the years 2008, 2009 and 2010, 85% of companies had between 0 and 9 employees, in clothing activities that percentage reaches 88%²⁸.

¹⁵Conclusions of the Observatory of Industrial Sector Textile. Indicators 2011.

¹⁶Conclusions of the Observatory of Industrial Sector Textile. Indicators 2011.

¹⁷Study on the competitiveness of EU industry fashion. IDEA Consult, 2012.

¹⁸Conclusions of the Observatory of Industrial Sector Textile. Indicators 2011.

¹⁹Conclusions of the Observatory of Industrial Sector Textile. Indicators 2011.

²⁰Observatory of Industrial Sector Textile. Training needs arising from the implementation of organizational innovations in textiles and clothing. December 2011.

²¹Information Centre Textile and Clothing. Industry data in 2011. News 04/25/2012. <http://www.cityc.es/>

²²Conclusions of the Observatory of Industrial Sector Textile. Indicators 2011

²³Employment Observatory of Public Service of Spanish Employment (SPEE).2011.

²⁴Conclusions of the Observatory of Industrial Sector Textile. Indicators 2011

²⁵Conclusions of the Observatory of Industrial Sector Textile. Indicators 2011

²⁶Conclusions of the Observatory of Industrial Sector Textile. Indicators 2011

²⁷Conclusions of the Observatory of Industrial Sector Textile. Indicators 2011

²⁸Information Centre Textile and Clothing. Industry data in 2011. News 04/25/2012. <http://www.cityc.es/>

- The sector is structured in a large number of small businesses. Among the 2.900 existing companies in 2011, 90% employed less than 5 people. The restructuring of the sector has led to a reduction in company size as it have had an impact in companies with more than 50 employees with greater intensity. Currently do not reach 3% of the total, while its weight in 2000 was 5%²⁹.
- The sector employment in Catalonia in 2011 represented 7,3% of the whole Catalan industry and 34,1% of the Spanish textile industry³⁰.
- In Catalonia, the employment was followed, in 2011, the downward trend of previous years, although at a much lower rate. The decline in the number of workers registered in the Social Security (SS) was -4.3%, almost half in 2010 (-8.5%) and far away from -18.5% recorded in 2009, when the marked had a peak of loss jobs. The textile sector showed a better performance during the year, a decrease of -1.8%, while the production reached a reduction of up to -7.5%³¹.
- The sub-header (spinning, weaving, finishing and other textile manufactures) form the basis of Catalan textile chain, as they represent more than half of employment (57%) and the total output of the sector (58 %)³².

Sources: Information Centre for the Textile and Clothing (CITYC), National Statistics Institute (INE), Statistical Institute of Catalonia (Idescat) Textile and Apparel Observatory (Ministry of Industry, Tourism and Trade), Department of Enterprise and Employment in the Government of Catalonia (Annual Report on Industry in Catalonia); Annual industry report in Catalonia in 2011. Generalitat of Catalonia. Department of Companies and Employment. June 2012; Information Centre Textile and Clothing. Industry data in 2011. News 04/25/2012. <http://www.cityc.es/>; Observatory of Industrial Sector Textile. Training needs arising from the implementation of organizational innovations in textiles and clothing. December 2011; Conclusions of the Observatory of Industrial Sector Textile. Indicators 2011; 2011. Assessment of the textile/clothing. Information Centre Textile and Clothing, February 2012; Institut de Comerç Exterior (ICEX); Study on the competitiveness of EU industry fashion. IDEA Consult, 2012; and Employment Observatory of Public Service of Spanish Employment (SPEE).2011.

²⁹Information Centre Textile and Clothing. Industry data in 2011. News 04/25/2012. <http://www.cityc.es/>

³⁰Information Centre Textile and Clothing. Industry data in 2011. News 04/25/2012. <http://www.cityc.es/>

³¹Annual industry report in Catalonia in 2011. Generalitat of Catalonia. Department of Companies and Employment. June 2012.

³²Annual industry report in Catalonia in 2011. Generalitat of Catalonia. Department of Companies and Employment. June 2012.

05

Professional profiles most in demand

Most highly qualified professional profiles

More qualified profiles tend to work in the areas of business most linked to management, especially coordinating production, logistics and distribution. They are also needed for design, developing new technologies and in research activities.

Training profile

Training requirements vary according to how technical each position is. The minimum educational level required for production-related positions is medium-level vocational training courses in textiles, garment-making and leather. At the other extreme, the higher requirements tend towards candidates with higher-level degrees in industrial or textiles engineering, which are required for positions in textile processing and research. Finally, business training such as degrees in business administration and economics are also important for positions strictly related to management.

In addition to these profiles, there are others with high levels of responsibility and independence who carry out creative, technical or management tasks. The minimum level of training in these cases is higher-level vocational training in design and/or textiles for creative positions, while more technical ones require a degree in textiles, chemical or industrial engineering.

A feature common to this type of profile is the need for additional training expanding specific knowledge of the activity and of textiles technologies, both for machinery and specific IT tools. Having studied a specialised postgraduate or master's degree relating to the position would therefore be a plus. However, as these profiles are often in team management positions, it is also important to know about health and safety at work. Finally, other knowledge specific to the industry is also viewed positively, as is training in quality control systems.

Skills profile

More qualified professional profiles have to combine a series of personal skills, the most important of which are effective time-management, motivation to do the job, and skills at leading and coordinating work teams.

They must also be dynamic and decisive people in order to adapt to unexpected situations, as well as being good at teaching and communicating in order to ensure that work is properly managed and assigned.

The greater the responsibility, the more skills are required. Therefore, individuals need good organisational skills, a high level of discipline and the ability to work unsupervised to a degree.

Examples of jobs in the web Barcelona Treball directory

- ✓ [R+D+i textile researcher](#)
 - ✓ [Process and timeline production analyst](#)
 - ✓ [Fashion product manager](#)
 - ✓ [Expansion specialist](#)
-

Less qualified professional profiles

Less qualified professional profiles carry out tasks in the industry's basic processes, especially in production and commercial areas. In contrast to those outlined above, these profiles are a long way from management and the taking of strategic decisions, focusing more on carrying out operational tasks.

Training profile

There are two types of training within less qualified profiles. The minimum training required of these professionals is compulsory secondary education, which is required for the most basic production tasks. There are also professionals who carry out tasks of a certain level of complexity, the minimum level of education for which is a medium-level vocational training course in textiles and garment making.

This type of profile does not strictly require additional training in the form of postgraduate or master's qualifications, although knowledge of the industry enabling the tasks involved in each position to be carried out is important. However, in the absence of specific knowledge, experience in the industry could be viewed equally positively as training.

Skills profile

The nature of these professionals' work brings them into contact with a large number of people, so they need to have an aptitude for teamwork, as well as good understanding and communication skills, as they act as a conduit for information between the various professional categories with which they work.

They must be good at organising work, able to make decisions and very versatile, in order to handle all the possible eventualities in undertaking their day-to-day work.

Examples of jobs in the Web Barcelona Treball directory

- ✓ [Assembler for special technical fabrics](#)
 - ✓ [Responsible for Logistics and storage](#)
 - ✓ [Clothing production operator](#)
 - ✓ [Specialised pattern designer-grader](#)
-

06

Future scenarios

Weaknesses

- Companies in the textile industry are generally small or medium-sized enterprises. This significantly limits the sector's capacity to invest, making it difficult to reorient companies towards other activities that generate greater value added. Moreover, the family nature of most companies in Catalonia, a lack of entrepreneurial vision and little motivation in the sector explain the industry's plight.
- The implementation of new strategies is restricted by small company size and the fall in operating margins in the sector as a whole. Reduced financing opportunities and the lack of specialised personnel also militate against its modernisation. This scenario has led to the demise of companies that have failed to adapt to the new market situation.
- The fall in the number of people employed in the sector due to structural renovation and the decreasing the number of companies.
- Major international competition and insufficient strategic positioning in foreign markets.
- Traditional commercial structure and the difficulty of accessing new distribution channels (although new ways of selling are being introduced, this is not widespread in the sector). The industry's high degree of fragmentation and the lack of cooperation between companies must be added to this.

Threats

- The textile and garment-making industry is one of those most affected by the relocation of operations to emerging countries especially in Asia, meaning that textile production in Europe, the U.S. and Japan is now much less important globally. The deregulation of the international textile trade, which culminated in 2005 with the abolition of restrictions on textile imports (quotas), has consolidated China's position as the world's leading textile power.
- The textile industry is significantly linked to other economic sectors, for example agriculture that produces natural textile fibres and the chemicals industry which provides synthetic fibres. This interrelationship means that a fall in production in one sector impacts the situation of the other, something especially apparent due to the crisis in the automotive, healthcare and construction industries, where falling demand and hence falling production has led to a decline in demand for textile products.
- Increased global competition and relocation of production with the emergence of countries that have comparative advantages in terms of production costs.
- Increased imports of textiles designed and produced by the emerging countries themselves.

Strengths

- Traditionally, the textile industry has been labour-intensive, although the introduction of new, technologically more advanced production processes has led to this factor becoming less important. Despite competition from emerging countries, these investments in technology and innovative equipment have improved the Spanish textile sector's productivity and competitiveness.
- The textile distribution industry has been drastically transformed in recent decades as a result of globalisation and the development of ICT. These changes have lessened the gap between the various stakeholders involved in the manufacturing process, reducing the lead time between an item's design and its arrival in the shops and creating short-circuit distribution. These improvements have enabled the creation of business and distribution models capable of meeting a particular demand in a matter of weeks, adapting quickly to changing trends and fashions.
- Some Spanish companies are internationally recognised with a good brand and product image and good market positioning that ensure their expansion.

- The incorporation of technology and innovation in products and processes is becoming more widespread in the various business strategies in the textile sector.
- It is a flexible sector which through continuous monitoring of the market has more and better opportunities to adapt to changes in demand.

Opportunities

- The survival of many companies is necessarily subject to a reorientation of their activities to increase the added value of their products. This means that when compared with inferior quality products sold by emerging countries, new technologies and new innovative fabrics are an opportunity for companies in Catalonia. These technologies include plasma and microcapsules, innovations designed to provide textiles with specific properties that enhance their functionalities or bring them new ones. Other technologies like radio frequency identification (RFID) can also bring competitive advantages, in this case due to better stock management.
- Logistics is seen as a new activity in the textile industry that could to some extent make up for the loss of jobs in garment making, although logistics requires far fewer jobs than production. However, companies specialising in clothing logistics are forecasting growth in coming years due to the expansion of chains and franchises and increased demand for their logistics services from medium-sized enterprises that are thus able to streamline their space and human resources.
- The emergence of new market niches and the increasing chances of product specialisation (technical fabrics, bio-sanitary fabrics, physiological fabrics, smart fabrics, etc.).
- Manufacturing products in short (limited edition), more varied and even more personalised runs.
- The emergence of new partnership initiatives between the textile and design industries.
- On 10 September 2012, there was an initial meeting in Brussels about the European project Textile 2020, which wants to create a European cluster of technical textiles, and aims to develop and implement an international strategy to help consolidate, strengthen and expand its international competitiveness.
- The Confederation of the textile industry and the Generalitat Government are joining forces to create a new vocational course about gentrification and manufacturing textile products, which will be held at the Institute of Terrassa. It is born to suit the needs of the sector and will focus on smart textiles and technical use, a niche market that allows the specialization of companies and generating new business opportunities.
- The Barcelona International Textile Show has established itself as a leader in the European circuit. In 2012 has celebrated the twenty-first edition of this event.
- The establishment of the Catalan Association of Fashion and Textile (ACTM), which brings together companies costumes, both knitwear and clothing, with the spirit of enhancing the competitiveness of the cluster and provide value added services to companies through individual and collective initiatives.
- The creation of *Miñ Moda España* by the Spanish Federation of Manufacturing Companies (FEDECÓN) to unify the dispersion of action made by Spanish companies in international markets.

07

Useful links

International organisations

Textiles and clothing: enterprise and industry (European Commission)

http://ec.europa.eu/enterprise/sectors/textiles/index_es.htm

EURATEX – European Apparel and Textile Organization

<http://www.euratex.org/>

ACTE – European Textile Collectivities Association

http://www.acte.net/content/about_acte/about_acte_en.htm

Spanish organisations

CITYC – Spanish Centre of Information about Textile and Clothing Industry

<http://www.cityc.es/>

MITYC – Spanish Ministry of Industry, Tourism and Trade's Textile and Clothing Industry Observatory

<http://www.mityc.es/industria/observatorios/SectorTextil>

FEDECON – Spanish Federation of Clothing Companies

<http://www.fedecon.es/>

AITEX – Spanish Clothing Sector Technology Institute

<http://www.aitex.es/>

AEGP – Spanish Knitwear Association

<http://www.agrupaciontextil.org/>

AITPA – Spanish Association for Industrial Cotton Textile Processing

<http://www.aitpa.es/>

ACOTEX – Spanish Business Association for the Textile and Accessories Trade

<http://www.acotex.org/>

International events (fairs, conferences, etc.)

Heimtextil. International Trade Fair for Home and Contract Textiles

<http://heimtextil.messefrankfurt.com>

Index 14. International Nonwovens Fair

<http://www.index14.org>

Techtextil 2013. International Trade Fair for Technical Textiles

<http://techtextil.messefrankfurt.com>

Barcelona International Textile Show

<http://www.stib.net/>

Spanish events (fairs, conferences, etc.)

FIMI – International Child and Youth Fashion Fair

<http://www.fimi.es/>

IFEMA - Madrid International Fashion week

<http://www.ifema.es/web/ferias/simm/default.html>

Barcelona International Textile Show

<http://www.stib.net/>

International themed portals

Home Textiles from Spain (ICEX)

<http://www.hometextilesfromspain.com/>

Textile Industry Today

<http://textiles.einnews.com/>

Spanish themed portals

Textil.org: Textile industry portal

<http://www.textil.org/>

Moda España portal: fashion statistics, companies and sectors in Spain (ICEX)

<http://www.fashionfromspain.com>

Noticiero Textil: news and current affairs relating to the textile, clothing and fashion industries

<http://www.noticierotextil.net/>

Tex 4future

<http://tex4future.net/>

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