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COMMISSION STAFF WORKING PAPER

**EVOLUTION OF TRADE IN TEXTILE AND CLOTHING WORLDWIDE - TRADE
FIGURES AND STRUCTURAL DATA**

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1. EU TEXTILE AND CLOTHING TRADE

1.1. Introduction

Textiles and clothing trade among World Trade Organisation (WTO) Members is governed by the Agreement on Textiles and Clothing (ATC), which came into force with the WTO Agreement on 1 January 1995. This agreement means that alongside progressive application of General Agreement on Tariffs and Trade (GATT) rules, there will be progressive phasing out of quotas in the EU, US and Canada. These quotas were inherited from the Multifibre Arrangements (MFA). After a 10-year period ending on 1 January 2005, the ATC will expire and all quotas will be abolished.

The EU is, together with the US, the world's largest trader in textiles and clothing (T&C) products (Chapter 1), and it will be facing, as well as the other producers in the world (chapter 2) a profound change in the trade environment. In fact, in 2005, all WTO members will have unrestricted access to the European, American and Canadian markets. Chapter 3 will tackle briefly the potential impact on major countries/regions concerned.

1.2. EU Textile and Clothing Trade

In the year 2002, total trade by the EU amounted to € 113 billion. The EU is also the world's biggest exporter of textile products and the second largest exporter of clothing products. In 2002, the EU exported a total € 43.8 billion with a negative balance of € 27.8 billion. The EU T&C sector was composed of some 110.000 enterprises (mostly small and medium sized) employing directly 2.1 million people, and with a turnover of € 200 billion¹.

Since the WTO Agreement on Textiles and Clothing (ATC) entered into force in 1995, EU imports have increased at a steady pace, despite the existence of quantitative restrictions (quotas). In 2002, the value of imports amounted to € 72,4 billion, an increase of 60 % over 1995. Imports from countries subject to quotas have increased by a similar percentage. Nearly a third of all textiles and clothing now bought in the EU are imports (31% in 2000).

EU quotas inherited from the Multifibre Arrangement (MFA)² are being phased out in a 10-year staged reduction plan that started on 1 January 1995. Quotas that have not been lifted in any of the three stages of liberalisation so far have been increasing significantly year by year, creating new opportunities for exporters. Between 1995, the first year of the Agreement on Textiles and Clothing, and 2004, the volume of quotas for WTO countries will have doubled. In addition, imports under quota represent less than a third of total textiles and clothing imports, and for many quotas, the low take-up still leaves the countries concerned significant

¹ Source: Euratex

² *Quotas currently apply to imports of textile and clothing products from the following WTO Members: Argentina, Hong Kong, China, Macao, South Korea, Singapore, India, Pakistan, Thailand, Indonesia, Malaysia, Peru and The Philippines.*

scope for boosting their exports. EU tariffs (MFN: most favoured nation rates) for textile and clothing imports are low and will go down further thanks to the EU's commitments in the WTO

However, these MFN-rates are applied only to a small share of the EU's textile and clothing imports, because of EU commitments under the Generalised System of Preferences (GSP) and the Cotonou Convention with the African, Caribbean and Pacific States.

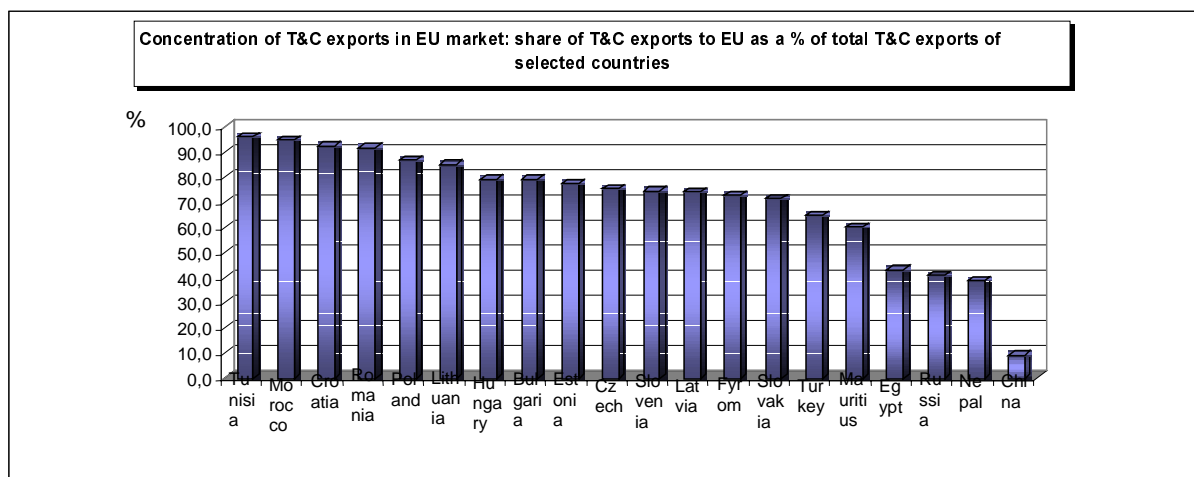
The EU has faithfully implemented all its obligations under the ATC, which requires it to gradually liberalise its trade regime in the run-up to 2005. At the beginning of the first stage of integration under the ATC (1995-1997), it has put 16.2 % of its 1990 imports under the (quota-free) GATT umbrella. The second stage (1998-2002) saw a further 17.1 % added to this. For the third stage, the EU has already adopted a list of liberalisation covering 18 % of imports, which resulted in the elimination of 65 quotas.

Finally, on 1 January 2005 the fourth stage will start. The remainder of trade will be integrated, resulting in the removal of all EU quotas. From this date onward, there will be free competition for all suppliers of textile and clothing products to the EU.

1.3. EU candidate countries

The next enlargement will bring to the EU over 0,6 million direct employees in the sector, or 30 % of the total number of employees in the sector in EU 15. A large number of them work for the EU market, either under OPT or under subcontracting. The overwhelming majority of their exports is concentrated in the EU, between two thirds and close to 100 % depending on the countries and the types of products.

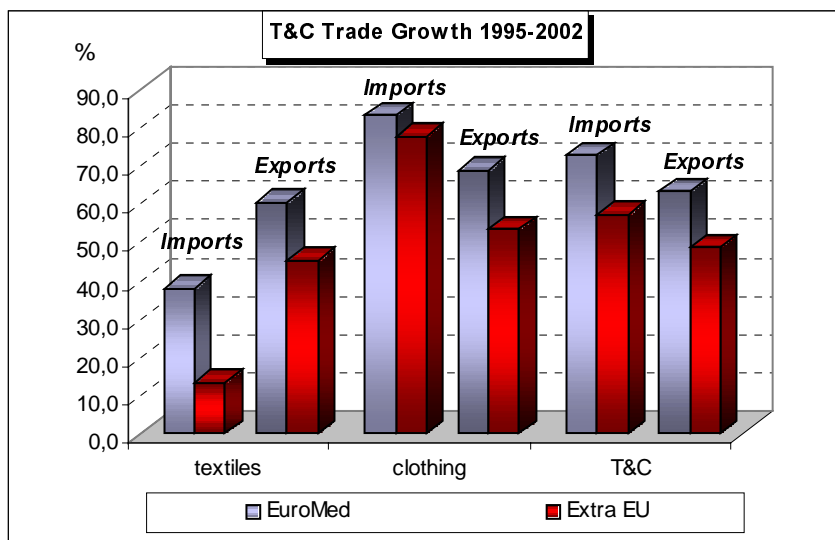
These countries are also a relatively important destination for EU export of intermediate (textiles) products for transformation and export back into the EU, as they account for 16 % of EU total exports of yarns and 8 % of all textiles exports.



1.4. Euro-Mediterranean countries

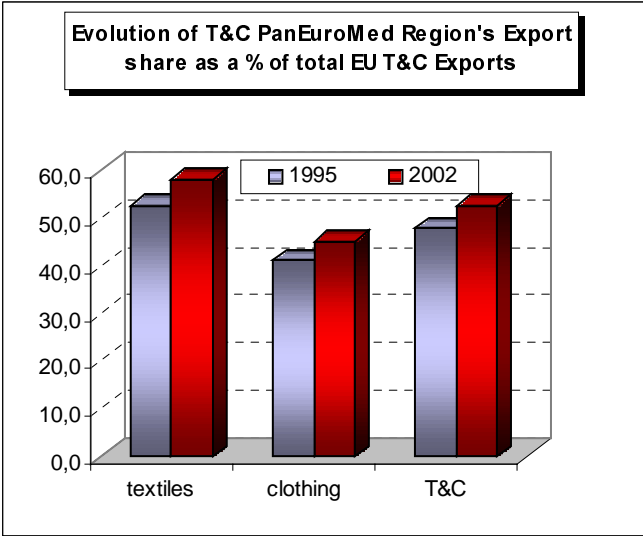
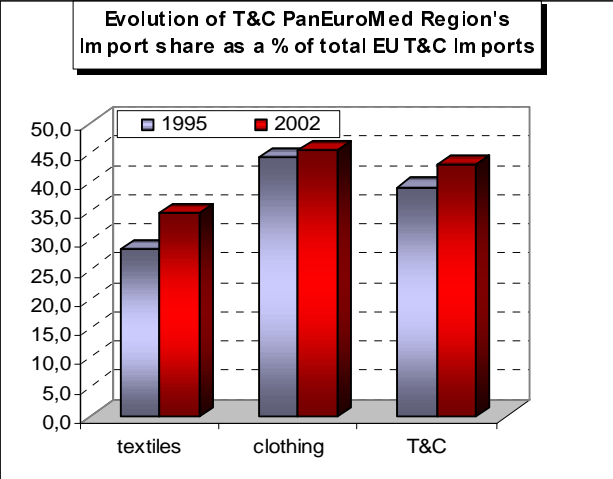
The Pan-Euro-Med countries outside the EU employ directly a total 4,3 million people³, of which the countries in the Southern and Eastern Mediterranean area employ over 3,7 million people. The importance of this area is double:

- a) first, because of the very important dependence of Southern and Eastern Mediterranean countries on the EU market for their exports and employment;
- b) second, because of the close relationship between EU T&C industry and the T&C industry of those countries, via investment and subcontracting relationships.



³ Source: Euratex. To note an alternative estimate by CEPII, according to which there were in 2000 5,4 million people employed in the sector.

A mixture of trade preferences, closeness, cheap labour and EU investments have resulted in a dependence of EU textile export industry on this market (in 2002, 58 % of EU textile exports went to those countries), mostly for processing and transformation in garments (in 2002 the EU exported 14,6 bn € of textiles and imported 25 bn € in garments). Trade between the EU and the rest of this area has grown more quickly than with the rest of the world, outpacing both imports and exports by 15 percentage points.



2. EVOLUTION OF TRADE IN TEXTILE AND CLOTHING TRADE WORLD-WIDE - TRADE FIGURES AND STRUCTURAL DATA

2.1. Introduction

Today's global economy provides opportunities for increased international trade and thus for the creation of economic wealth. The MFA phase-out will bring additional opportunities as well as challenges for developing countries as they were a growing factor in world textiles and clothing trade in the last decades. However, for countries to be able to reap these benefits they need to fully understand the changes that occurred in the global context, mainly the new organisation of production based on short delivery time and regional strategies.

As a labour-intensive manufacturing sector, the textile and especially the clothing industry is considered to be the first step in the strategy towards economic growth and development as well as diversification for primary-exporting countries in order to achieve terms of trade gains. Moreover, as the demand for textiles and clothing steadily grows in the world as countries become wealthier, the development of an export-oriented textile and clothing industry has been an economic "springboard" of many developing countries around the world and a masterpiece in their industrialisation process.

Textile and clothing (T&C) trade represent 5.7 % of world exports. In four decades, world textile and clothing trade increased by more than 60 times (actually faster than total goods trade, which grew by 48 times), from less than \$ 6 billion in 1962 to \$ 342 billion in 2001 (in nominal terms). The more labour intensive clothing sector has increased much faster than textile and represent 57 % of world T&C trade. Growth of trade in this sector has, however, witnessed a slowdown in value terms since the mid-1990s, particularly under the ATC, explained in part by reduced prices due to increased competition among supplier countries.

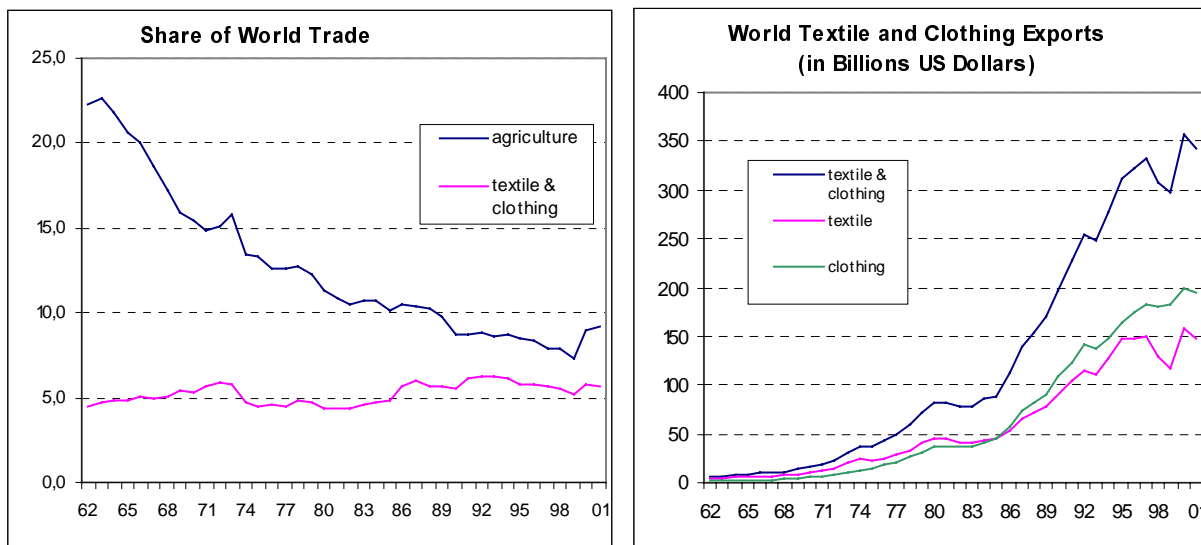
In the late 80s developing countries overtook industrialised countries in their share of T&C exports, and now account for 50 % of world exports of textile and 70 % for clothing. This difference is explained by the fact that the clothing industry is more labour intensive than textile, thus labour-abundant developing countries have a comparative advantage in clothing.

The T&C sector is thus particularly important for developing countries, and for many of them it is the most important industrial sector, in terms of exports (and therefore as source of foreign income) as well as in many instances also in terms of employment and value added. In the case of quite a number of developing countries - and especially some least developed countries and small developing countries - it would be possible to speak about a dependency on T&C: for some of them (see figures in the annex on "dependency ratios") T&C represents up to 90 % of total industrial exports and up to over 50 % of industrial employment).

Such dependency is compounded by a concentration in some markets, those of industrialised countries and especially the EU and the US: these two markets accounted in 2000 for 52 % of world imports of textiles and for a hefty 71 % of world clothing imports. In a number of cases, such concentration has been facilitated, among other factors, by the existence of high tariffs and other obstacles to trade among developing countries.

Regional agreements and other preferential schemes providing for quota and duty free access have been important for a number of developing countries, including least developed countries, to maintain their competitive position in the sector. Such preferential access as well as the protection from other competitors offered by the quotas may have facilitated dependency on these products for export earnings (T&C exports from some Mediterranean countries to the EU and from Mexico to the US account for up to 90 % of their total T&C exports). Such countries may therefore be more vulnerable to the elimination of quotas and the erosion of preferences that will result from further multilateral liberalisation in the framework of Doha Development Agenda.

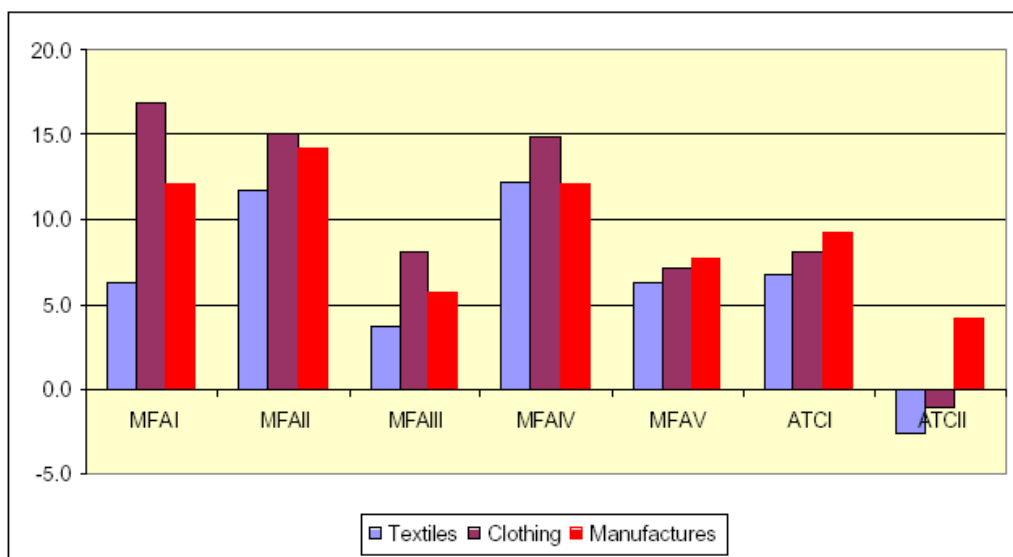
2.2. Textile and clothing: world trade, EU trade



Since 1962, world textiles and clothing trade increased by more than 60 times, from less than \$6 billion to \$342 billion (in nominal terms) in 2001. In the beginning of the 1960s, however, the value of world textile trade was twice that of world clothing trade. In forty years, clothing trade has increased by 128 times while textile trade has grown 36 times; as a result clothing represent today the major share accounting in 2001 for nearly 60% of total world textile and clothing trade (i.e. \$147 billion). The growth rate of textile and clothing trade is higher than agriculture trade growth rate (nearly 20 times in 40 years).

Textile and clothing trade has grown more quickly than total trade in goods, which from 1962 increased by 48 times. The pace of growth in textile exports has always lagged behind that of manufactures. Whereas, clothing sector outpaced it through the 1970s and the 1980s, and witnessed a slowdown since the 1990s and a negative growth under ATCII.

Growth in world exports of textiles and clothing (% per year, current dollar terms)

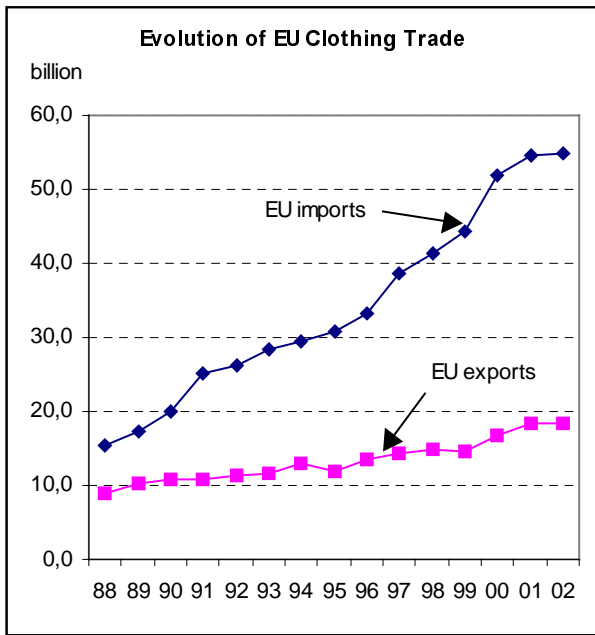


Source: IFPRI and calculations by Commission services

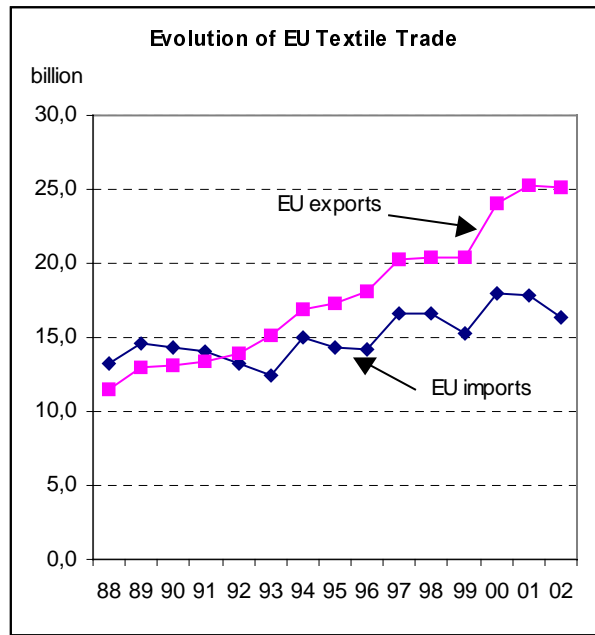
The negative trend witnessed last decade is due, according to the World Bank⁴ in part to the fierce competition among suppliers, the slump in raw material prices of cotton (near 50% drop in cotton prices between 1995 and 2001), and the strong productivity gains in the textile sector (27 of the 43 countries registered a decline of 8 to 59% in labour costs relative to US between 1990 and 2000).

In the EU the sector is characterised by strong import growth. In 2001, EU import of textile and clothing exceeded exports by almost 29 billion euro. There is a long-term trend of steady decline in the EU clothing trade since the early 70s.

⁴ World Bank (2002) : Textile and Clothing Exports in MENA Past Performance, Prospects and Policy Issues In Post MFA Context



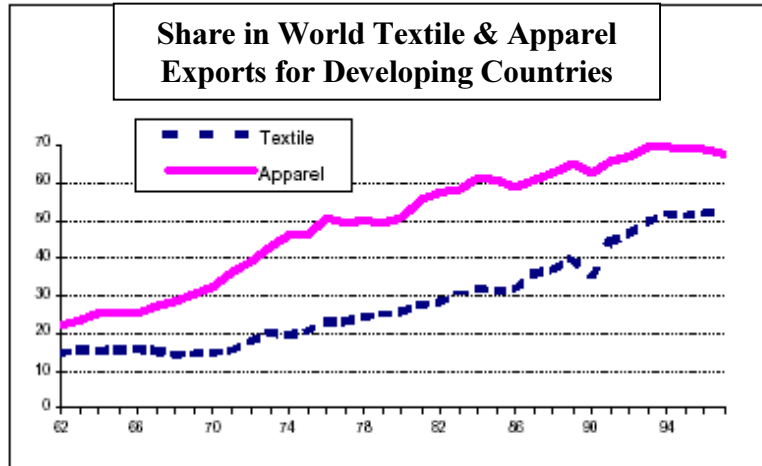
Source: ComExt



Source: ComExt

2.3. Textile and clothing: evolution of export share between countries

Building on the experience of the East Asian “miracle economies” developing world witnessed a widespread shift from import substitution to export-led growth. In the last decade, almost 70% of world clothing were exported from developing countries.

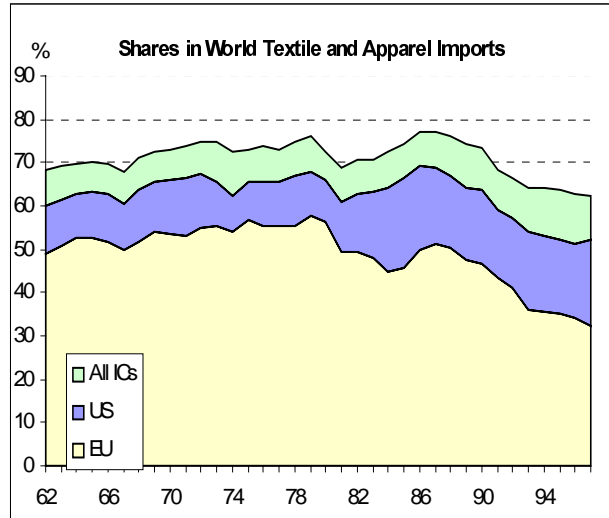
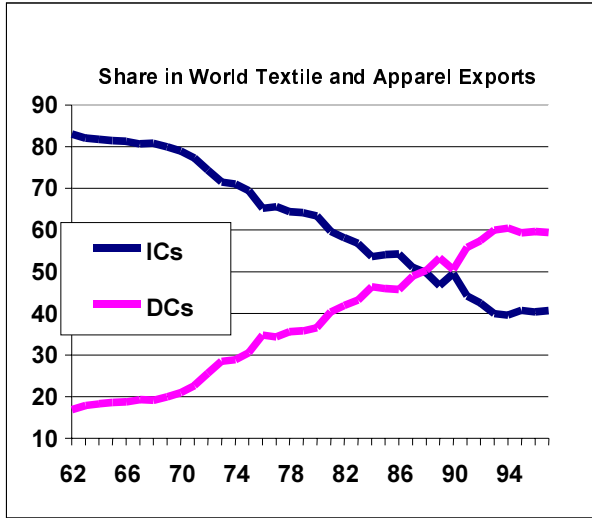


Source : IFPRI, 2001

However, since the eighties, there has been a major transformation in how the international economy is organised leading to a strong trend in the regionalisation of international trade.

Developing country exports have risen more rapidly than world exports over the past half-century. Developing countries now account for more than a third of global exports, and nearly one-fourth of global exports of manufactures. In the T&C industry, the MFA have been distorting world trade with a system of restricting quotas allowing the industrialised countries to account for the largest share of world total T&C exports until 1990. This led also the Newly Industrialising countries to engage in quota hopping: subcontracting or relocating to countries which had not fulfilled their quotas, increasing the share of non-partner imports in EU and US T&C imports.

In the mid-1960s, developing countries accounted for nearly 15% of world textile exports and less than 25% of world clothing exports. In 2000, these shares are more than 50% and 70%, respectively.

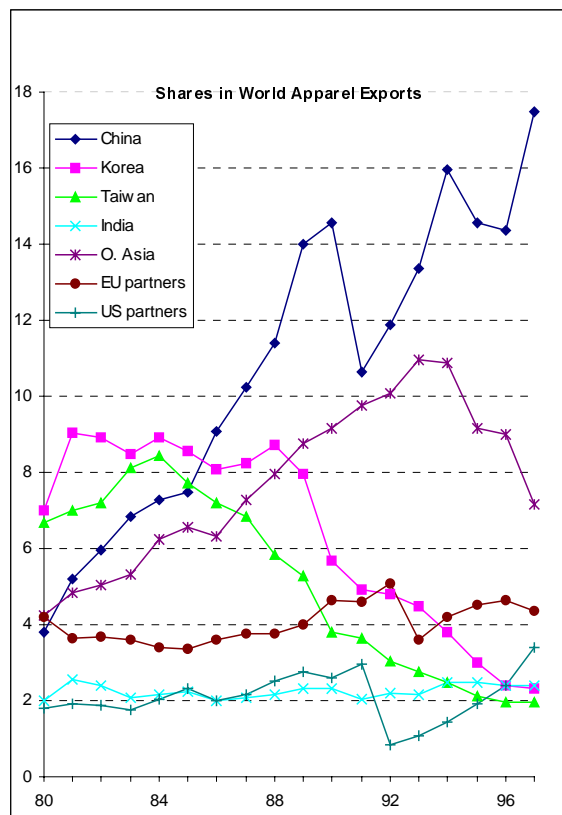


Source: IFPRI, 2001

2.4. The international division of labour in T&C industry

The international division of the production process (i.e. the ability of producers to slice up the value chain resulting in a complex but eclectic geographic relocation of the production processes on a global scale), has helped developed countries keeping traditional textile market shares on the world market and slow down the rate at which the clothing market share might have been eroded otherwise, while supporting the industrial development of developing countries. In fact, there are large differences in capital intensity and skill requirements between textile and clothing industry.

Thus the fragmentation of commodity chains which allows an ever-deeper specialisation based on regional production networks and component specialisation implies that the developed countries exports their input (fabrics) towards their respective neighbour developing countries specialised in those parts of the production processes which are labour-intensive, low labour-cost, low-skilled and in which they have a comparative advantage (these are mainly assembly activities), and re-import cloths made from these fabrics. In fact, the industrialised countries are the destination of more than 70% of world textiles and clothing trade, with the EU and the US as the biggest importers. Liberalisation of textiles and clothing trade could make these figures even bigger.



Source: IFPRI, 2001

The removal of quota after 2005 is threatening many developing countries, which rely on earnings from the textile and clothing sector for a substantial portion of their foreign exchange earnings. Textile alone accounted for 49% of Pakistan's merchandise exports in 2000, clothing for 50% of Sri Lanka's. Among the least developed countries, textile and clothing represented 84% of Bangladesh's merchandise export.

Country	% of Total Export Earnings			GDP per capita dollars
	Textiles	Clothing	T&C	
Bangladesh	9	75	84	343
Pakistan	49	23	72	436
Mauritius	5	64	69	3.773
Sri Lanka	4	50	54	862
Nepal	32	21	53	239
Tunisia	2	40	42	2.058
Turkey	14	25	39	2.999
Morocco	2	32	34	1.116
Madagascar	29	1	30	243
Haiti	2	28	30	497
India	14	14	28	453

Source: WTO

The importance of the textile and clothing industries in many OECD countries is now relatively minor in terms of both production and exports, if we compare it with some developing countries. Overall they amount to slightly more than five percent of exports and less than five percent of manufacturing value-added.

Textile and Clothing Exports and Value-Added Shares for Selected Countries:

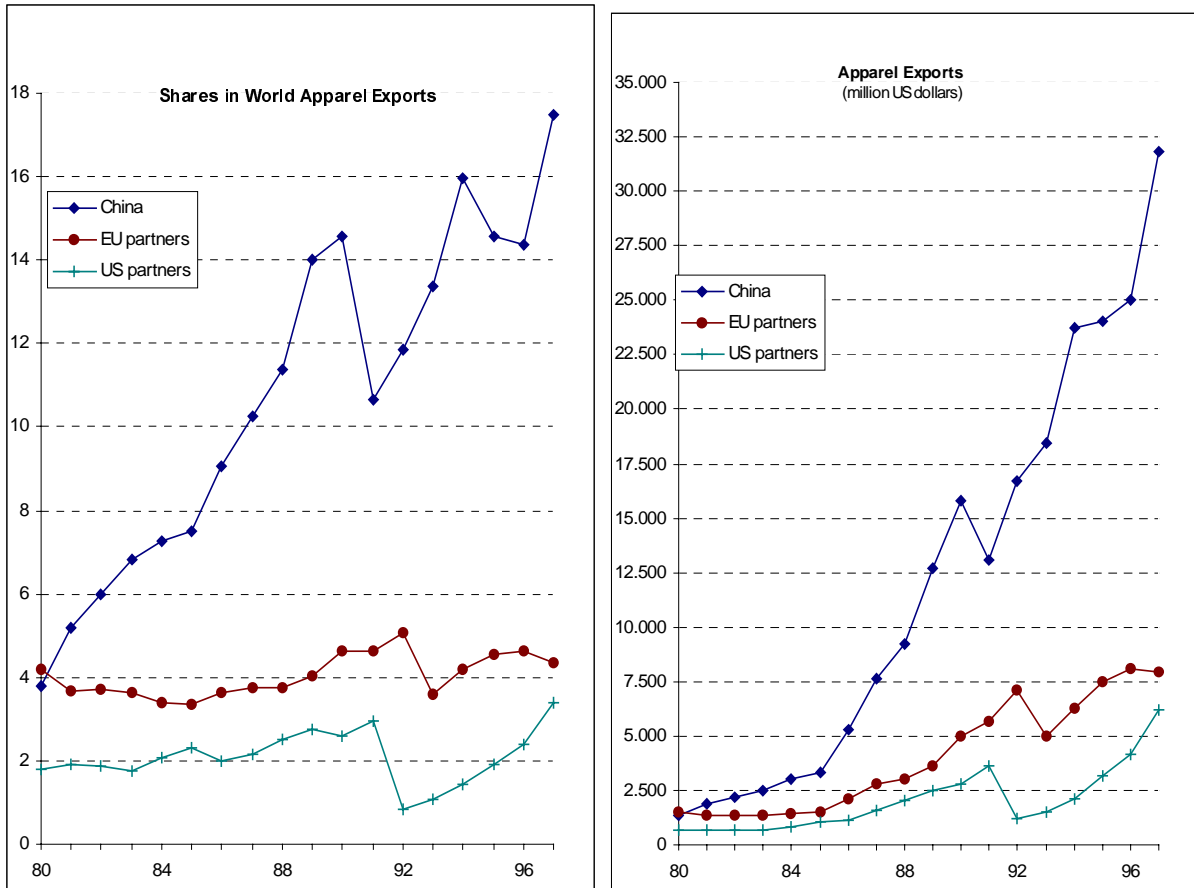
	Textiles ^a			Clothing ^b			Textile and Clothing ^c			Textile and Clothing ^d		
	1980	1990	1996	1980	1990	1996	1980	1990	1996	1980	1990	1995
EU 15	3,9	3,4	2,8	2,3	2,7	2,4	6,2	6,1	5,2	6,3	5	4,2
Sweden	1,4	1,1	1	1	0,7	0,5	2,4	1,8	1,5	2,6	1,6	1,2
Finland	1,4	3	1,5	5,1	1,9	0,6	6,5	4,9	2,1	6,7	3	2,2
Denmark	2,5	1,9	1,7	2,3	2,3	2,5	4,8	4,2	4,2	4,8	3,8	3,2
United Kingdom	2,8	2,4	2,1	1,7	1,6	2	4,5	4	4,1	5,4	4,6	4,4
France	3	2,8	2,5	2	2,2	1,9	5	5	4,4	6,7	5,2	4,3
Netherlands	3,1	2,2	1,6	1,2	1,7	1,5	4,3	3,9	3,1	3,8	2,8	2,4
Germany	3,3	3,3	2,6	1,5	1,9	1,4	4,8	5,2	4	4,5	3,3	2,8
Spain	3,4	2,7	2,8	1,5	1,1	1,3	4,9	3,8	4,1	9,2	6,3	5,9
Ireland	5,3	2,4	1,3	2,5	1,9	1,1	7,8	4,3	2,4	7,2	3,7	2,5
Italy	5,3	5,6	5,3	5,9	7	6,4	11,2	12,6	11,7	10,2	10,5	10,6
BelgiumLuxem.	5,5	5,4	4,3	1,5	1,7	1,7	7	7,1	6	7,3	6,9	6,6
Austria	6,1	5	3,5	3,3	2,8	2,4	9,4	7,8	5,9	8,1	5,9	4,6
Greece	9,4	6,2	4,8	7,7	21	16,8	17,1	27,2	21,6	20,7	17,7	14,2
Portugal	13	8,1	6,8	13,6	21,3	15,1	26,6	29,4	21,9	19,5	19,4	16,6
Canada	0,4	0,5	0,8	0,3	0,3	0,6	0,7	0,8	1,4	6,4	4,7	4,3
USA	1,7	1,3	1,3	0,6	0,7	1,2	2,3	2	2,5	5,6	4,6	4,4
Japan	3,9	2	1,7	0,4	0,2	0,1	4,3	2,2	1,8	6,1	4,4	3,7
Selected developing countries												
Indonesia	0,2	4,8	5,7	4	6,4	7,2	4,2	11,2	12,9	10	11,9	17,3
Malaysia	1,2	1,2	1,7	1,2	4,5	3	2,4	5,7	4,7	7	6,4	5,3
Brazil	3,3	2,4	2,1	0,7	0,8	0,5	4	3,2	2,6	9,9	8,3	6,8
Hong Kong	4,6	7,5	6,5	23,6	31,9	32,7	28,2	39,4	39,2	40,1	35,4	26,4
Morocco	4,9	4,8	3,3	4,7	16,9	16,1	9,6	21,7	19,4	15,8	16,5	15,9
Thailand	5,1	4	3,4	4,1	12,2	7,2	9,2	16,2	10,6	18,9	22,8	25,2
Taiwan	9	9,1	10,4	12,3	5,9	2,8	21,3	15	13,2	14,8	10,8	9,3
Turkey	11,8	11,1	11,7	4,5	25,7	28,3	16,3	36,8	40	14,7	14,4	14
Korea	12,6	9,3	9,8	16,8	12,1	3,3	29,4	21,4	13,1	18,2	10,2	9,6
India	13,3	12,1	14,2	6,9	14,1	13,4	20,2	26,2	27,6	20,7	14,3	14,3
China	14	11,6	8	8,9	15,6	16,6	22,9	27,2	24,6	17,2	13,7	12,3
Pakistan	33,5	47,6	52,8	3,9	18,1	20,1	37,4	65,7	72,9	20,2	28,9	20,8
Banladesh	52,2	18,3	13,6	0,2	35	54,8	52,4	53,3	68,4	40,3	33,9	32,6

a: Share of textile exports in total merchandise exports - in %. - b: Share of clothing exports in total merchandise exports - in %. - c: Share of textile and clothing exports of total merchandise exports - d: Share of clothing and textile value added in total value added of manufacturing industry; data stem from 1995.

Source: J. Francois, H. Glismann and D. Spinanger, In Kiel Institute of World Economics Working paper n°997, August 2000 and our calculations.

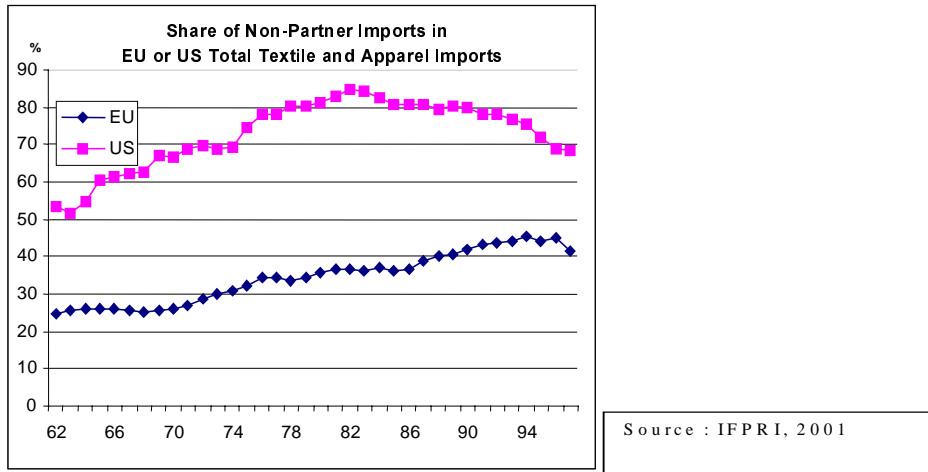
2.5. Textile and clothing: Regional agreements

EU and US preferential access given to developing countries has been important for the latter to maintain or even improve their competitive position. This is particularly evident in the case of clothing as illustrated by the graphics below.

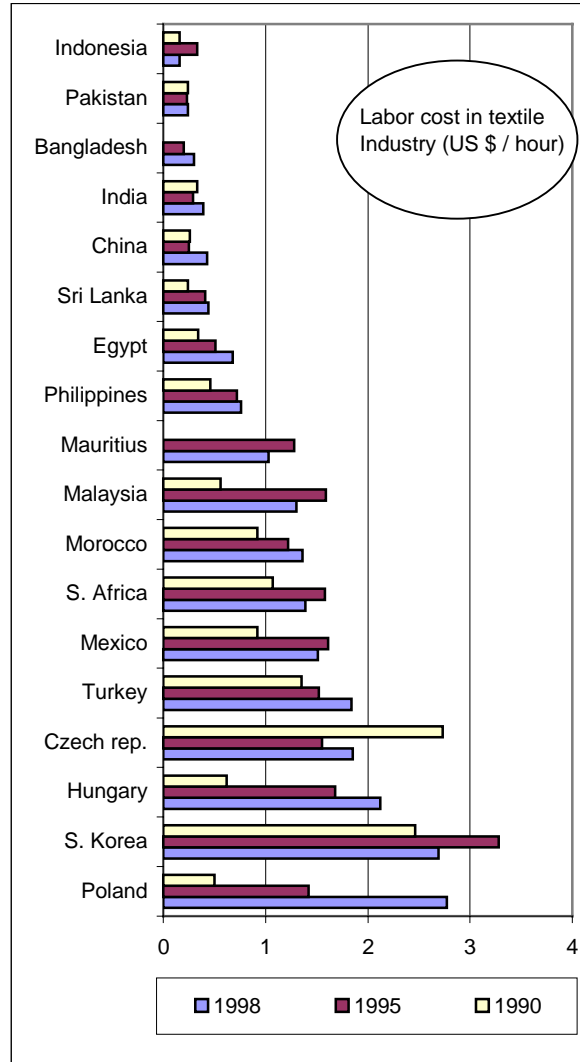
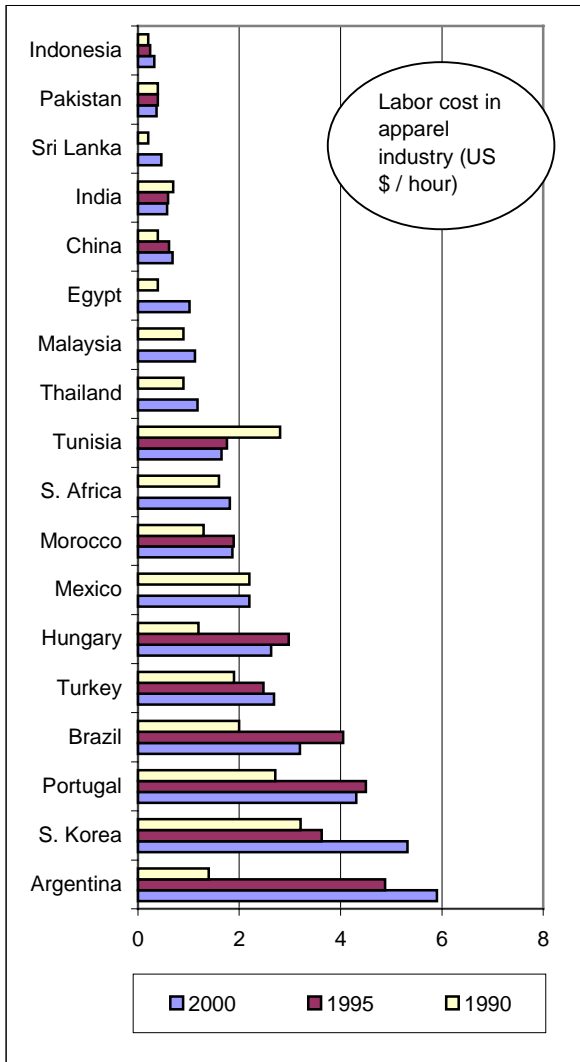


Source: based on IFPRI, 2001

The preferential access to the EU (candidate countries and Mediterranean countries) and to the US (Mexico and ICB) have resulted in the eighties in an increase of exports higher than with non-preferential partners. The later is clearly decreasing as shown in the following graphic.



With its low cost of labour and its seemingly infinite supply of workers, China seems to have the potential to out-compete other economies in the manufacturing of almost anything labour-intensive. As a matter of fact, more than two-thirds of China's exports today are garments, toys, shoes, furniture and other assembling activities.

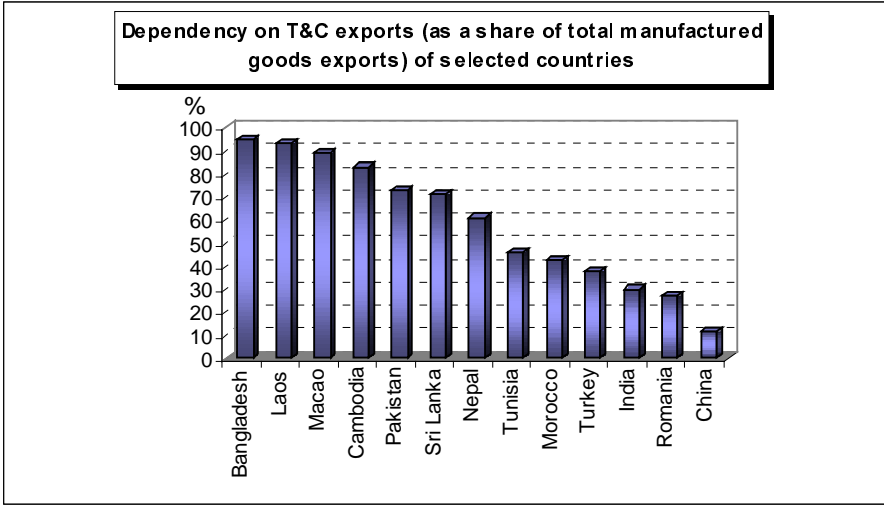


Source: World Bank

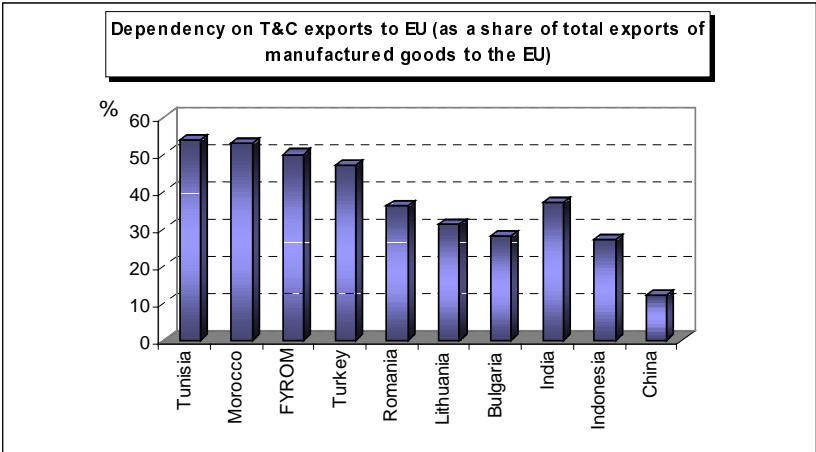
2.6. Dependency on textiles for developing countries

Dependency on textiles and clothing exports translate the vulnerability of countries to sudden changes in the trading environment for the sector and therefore of total quota dismantling, although the precise impact on those countries will depend on their ability to respond to changing market circumstances.

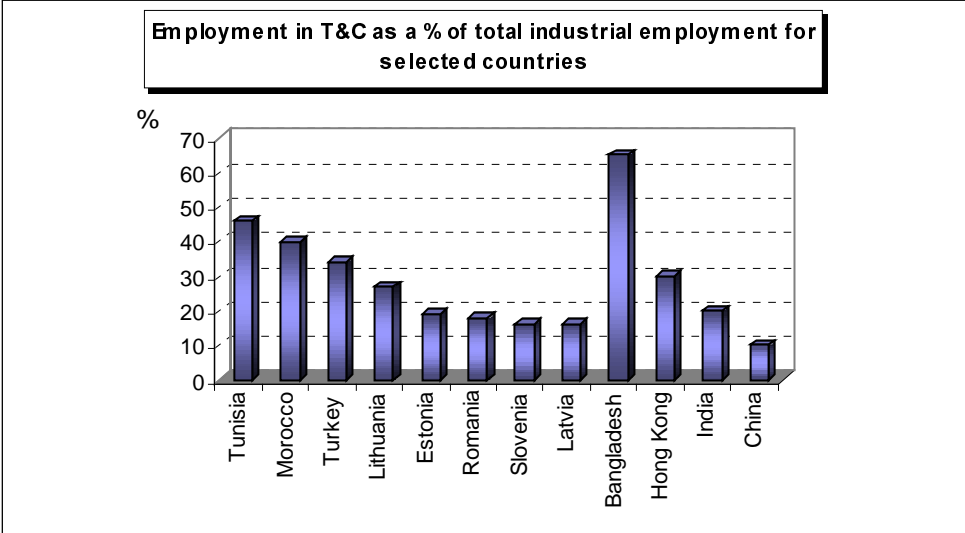
Some DCs are highly dependent on textiles and clothing (T&C) *exports*, and this is the case in particular of LDCs and of some Mediterranean countries. The highest *share of total industrial goods exports of T&C exports* is accounted by Bangladesh (95 %), Laos (93 %), Macao (89 %), Cambodia (83 %), Pakistan (73 %), Sri Lanka (71 %), Nepal (61 %), Tunisia (46 %), Morocco (43 %), Turkey (38 %), India (30 %) and Romania (27 %), for China being only 12 %.



These rates are higher for some countries when considering the *share of T&C exports of their total exports to the EU*, especially for Euro-Med and even candidate countries: 54 % for Tunisia, 53 % for Morocco, 50 % for FYROM, 47 % for Turkey, 36 % for Romania, 31 % for Lithuania, 28 % for Bulgaria; among other countries this ratio is also high for India (37 %), Indonesia (27 %) but lower for China (only 12 %). Finally, a third ratio shows that *for some countries their T&C exports are very highly concentrated on the EU*, especially in the Euro-Mediterranean area which account for up to over 90 % of destination of exports for several of them.



Whenever *employment* data are available, they show also a very high dependency on T&C (see annex 4): this highest are Morocco and Tunisia (39 and 41 % respectively in 1998), Turkey (34 %), and by far Bangladesh (65 % in 1985); these figures are lower for India (20 %) as well as also China (estimated around 10 %), but surprisingly high for Hong Kong (30 %). The figures for value added are normally considerably lower than employment figures, between half and a third.



3. IMPACT OF THE MFA PHASE-OUT, REVIEW OF SOME RELEVANT STUDIES

3.1. Introduction

A recent survey on the subject undertaken by the OECD in 2003 indicates that the estimates of welfare gains, which depend originally highly on the scenario considered for the simulation and the simplifying assumptions taken, show a wide range of figures, with expected annual global benefits ranging from \$6.5 billion to \$324 billion⁵. Moreover, it shows that some studies predict ATC quota elimination to account for up to two-thirds of all gains from the Uruguay Round, while others put the contribution of textile and clothing liberalisation at merely 5%. Different modelling approaches imply similar discrepancy with respect to the distribution of welfare gains.

Nevertheless, the general assumption is that once quotas will cease to restrict T&C exports from developing countries there will be an improvement of those countries' trade, confirming the already existing trend which sees the increase in the movement of the clothing industry from developed to developing countries. However the situation is getting more complex as industry strives to exploit information technology to integrate a network of raw material suppliers and to ship the right product to the right place at the right time; the greatest relocation could be therefore developing countries often depending on their domestic policies and how fast they are in implementing an efficient restructuring of the sector. Once quotas are lifted, importing countries will be able to base their decisions on market criteria rather than on the availability of quotas and import licenses. Resource allocation possibilities of importing countries will be enhanced. Production and export will be rationalized and move to more efficient production and even sectors.

In fact, the majority of studies find that the MFA phase-out would increase global welfare as well as world trade of T&C and developing countries as a whole will further gain market share in world total exports but not evenly at the level of individual developing country.

3.2. Asia and China

All studies indicate that Asia will experience the greatest changes in the distribution of production. The quota system has provided protected market shares for higher cost producers, so when the quota system is fully eliminated in 2005 it should result in a much more market-driven system.

China has generally the highest predicted growth. Not only does China have a very low cost labour force, it also has a very important own textile industry and can benefit from Hong Kong's well established financial and marketing expertise. The most extreme impact study foresee that China, which currently holds about one-fifth of the global apparel market, might have a 150 % increase in their overall textile and clothing exports⁶ or nearly 50 percent of the world market after MFA phase-outs⁷. These assumptions are based both on the very high utilisation of many quotas by China and China's very important production capacities. The

⁵ The highest figure is given by Francois, J.F., B. McDonald and H. Nordström, 1994. "The Uruguay Round: A Global General Equilibrium Assessment." Discussion Paper N°1067. London: Centre for Economic Policy Research.

⁶ Joseph François and Dean Spinanger, Greater China's Accession to the WTO, December 2001.

⁷ Ianchovichina E. and W. Martin, 2001. Trade Liberalization in China's Accession to the WTO, World Bank, June 2001.

evolution of imports from China into the EU of products liberalised under the 3rd stage of the ATC (on 1.1.2002) in year 2002 seem to point in that direction⁸.

According to some estimates, India and Pakistan may lose market share to China, but could compensate through shares taken from other (mostly smaller) suppliers if domestic structural reforms are undertaken.

3.3. Least Developed Countries (LDCs)

A number of studies point out that, whilst a rapid end to the MFA would have been more favourable to some developing country exporters, the agreed slower phase-out may have actually protected the position of the smaller producers and some LDCs.

Most of the studies agree that once quotas are removed, some LDCs are expected to suffer from their lack of textile industry and poorly developed infrastructure. The poorest countries have little choice but to compete head on with the biggest low-wage suppliers by offering lower prices, by contrast to developed countries and NIC which have moved offshore or have shifted to other products of higher value added.

Other studies – e.g. a study done recently by the UNCTAD⁹ – find that duty- and quota-free market access will benefit LDCs. The sources of the benefits to LDCs are both improved terms of trade (associated with higher export prices in donor countries' markets) and improved allocation efficiency. Moreover, they found that coordinated action from the Quad would stimulate LDC exports in a broader range of sectors (and especially in clothing products) and would spread substantial gains across a higher number of LDCs.

3.4. Developing Countries with preferential agreements

A number of studies reviewed find out that developing countries currently free from the MFA quota restraints might lose their market shares, as world T&C prices are lowered by increasing competition in world T&C trade post-MFA. Some exporters of countries subject to quota may be able to drop their prices without sacrificing margins because they no longer have to bear the cost of buying quota. As a consequence, average unit value of exports has been declining as competition intensifies; actually, growth in world textile and clothing exports have decelerated in US dollar values since the start of ATC.

Mexico has gained market share since the advent of NAFTA, which has given them a preferred position in the US market; the same applies for Mediterranean and European

⁸ In 2002, in those product categories (worth a total € 8,3 bn) for which quotas were eliminated vis-à-vis China as a consequence of the 3rd stage of ATC implementation, EU imports from China increased by 53 % in value and by 164 % in volume, while average unit prices decreased by 42 %. EU total imports from all origins in those products did not experience any similar changes (increase of 1 % in value and 10 % in volume), thus implying a substitution of imports from other countries (with only one significant exception, there were drops in the imports from almost every other country): China's market share of EU imports in those products increased in one year to 35 % in value (from 23 % in 2001) and to 30 % of volume (from 12 % in 2001).

Data for the US seem to go in a similar direction, as in the first eight months of 2002, as increases in Chinese exports to the US (+47% in clothing and +145% in textiles) during that period appear to have been at the expense of apparel imports from Mexico and Caribbean countries -- which contain a large amount of US yarn and fabric.

⁹ Bora, B., L., Cernat and A. Turrini, 2002. "Duty and Quota-Free Access for LDCs: Further Evidence from CGE Modelling, Policy Issues in International Trade and Commodities Study Series n°14, Geneva: UNCTAD.

countries in the EU market, but all these countries will be closer to a level playing field once the quotas are phased out.

3.5. Industrialised countries

Industrialised countries are likely to witness substantial welfare gains from lower consumer prices and more efficient resource allocation in the longer run. In the short or medium-term, significant adjustment costs following MFA phase-out may arise if resources that are released from textile and clothing activity cannot switch to another activity without disruptions.

The removal of quantitative restrictions eliminates the basis for quota rents (quota rents are the amount the holders of quota get for the right to export specific products to restricted market). The latter should theoretically be passed from exporters to consumers in previously import constrained markets in the form of lower prices (according to some estimates, there could be declines in world prices of textile by 2 percent and clothing prices between 5-10 percent).

There are also efficiency gains from specialisation according to comparative advantage, which in the case of the US, the EU and other quota-constraining countries may imply increasing domestic consumption and reducing production.

Some studies point out that removal of MFA quotas may influence the industrialised country composition of suppliers towards more concentration, with higher cost developing countries and small suppliers, for which the production of textiles and clothing might have been the first stage of the industrialisation process, possibly losing out.

3.6. Employment

Most studies predict that the short term impact could be highly disruptive to employment, particularly towards the end of the phase out period in industrialised countries, although not all in the same way. Jobs would be lost not only in Europe and North America but also in some developing countries, especially those where the MFA allowed less competitive exporters to export more than their competitive shares. One possible effect mentioned by some studies is that the increase in competition at a global level may result in downward pressure on wages and working conditions, as the elimination of quota restrictions will be to further reduce labour costs which imply that the latter is likely to be an even more significant factor.

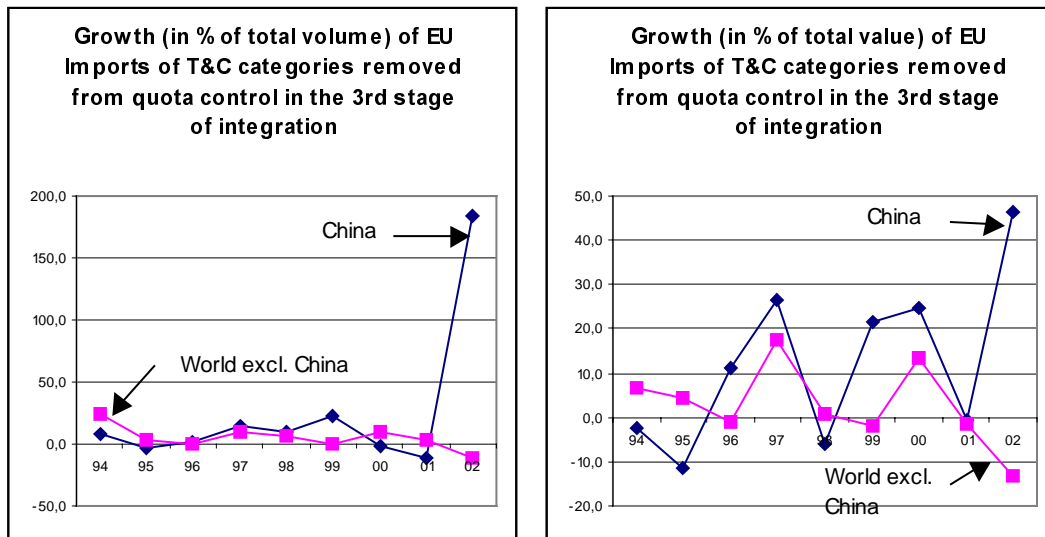
As outlined in the Draft Communication on this matter, skills up-grading is of paramount importance to enable the sector to further harness the competitive advantages of higher value-added production (quality, high design content, technical textiles etc.) Furthermore, a satisfactory development in this direction is dependent on acceptable reciprocity in liberalisation of access to markets.

Ensuring the sustainable development of the textile and clothing sector in Europe will require a commitment from all – including policy makers and social partners. Social dialogue at the European level plays a key role in the management of change in industrial relations.

4. IMPACT OF 3RD STAGE OF INTEGRATION IN EU IMPORTS

EU imports of textile and clothing (T&C) categories integrated in the 3rd stage of ATC have increased by 1,1% in value and 11% in volume while the average price for these categories decreased by 9% (table 1). We have also the same global picture when we consider only those categories where China had quotas (+1,1% in value, +10,2% in volume and -8,2% in average unit price). However, when we take a closer look, the picture is quite different. In fact, T&C products removed from quota control in the third stage of integration has seen a sharp increase of Chinese exports at the expense of other suppliers (Table 1 & 2).

China's textile and clothing industry is reaping the benefits of World Trade Organisation membership as the United States, European Union (EU) and Canada phase out quotas and relax licensing management on Chinese textile exports. China's textile and clothing imports removed from quota restrictions under the 3rd stage of ATC implementation surged by 46% in value and 188% in volume, while average prices decreased by 50%.



This trend of sharp increase of Chinese exports continued in the first half of 2003. Although it seems to be decelerating¹⁰ when compared with the first half of 2002, it is still increasing when compared to the first half of 2001: +59,2% in value, +286,4% in volume and -58,8% for average unit price. This allowed China to overtook the three major Mediterranean exporters¹¹ (Med3), the number one supplier of textiles and clothing to the EU, despite the Euro-Mediterranean partners having duty-free, as well as quota-free, import benefits. During the January-June period, China's textile and clothing shipments reached 693.000 tons accounting for 15.1 percent of all EU imports of textiles and clothing although in value Med3 is still ahead.

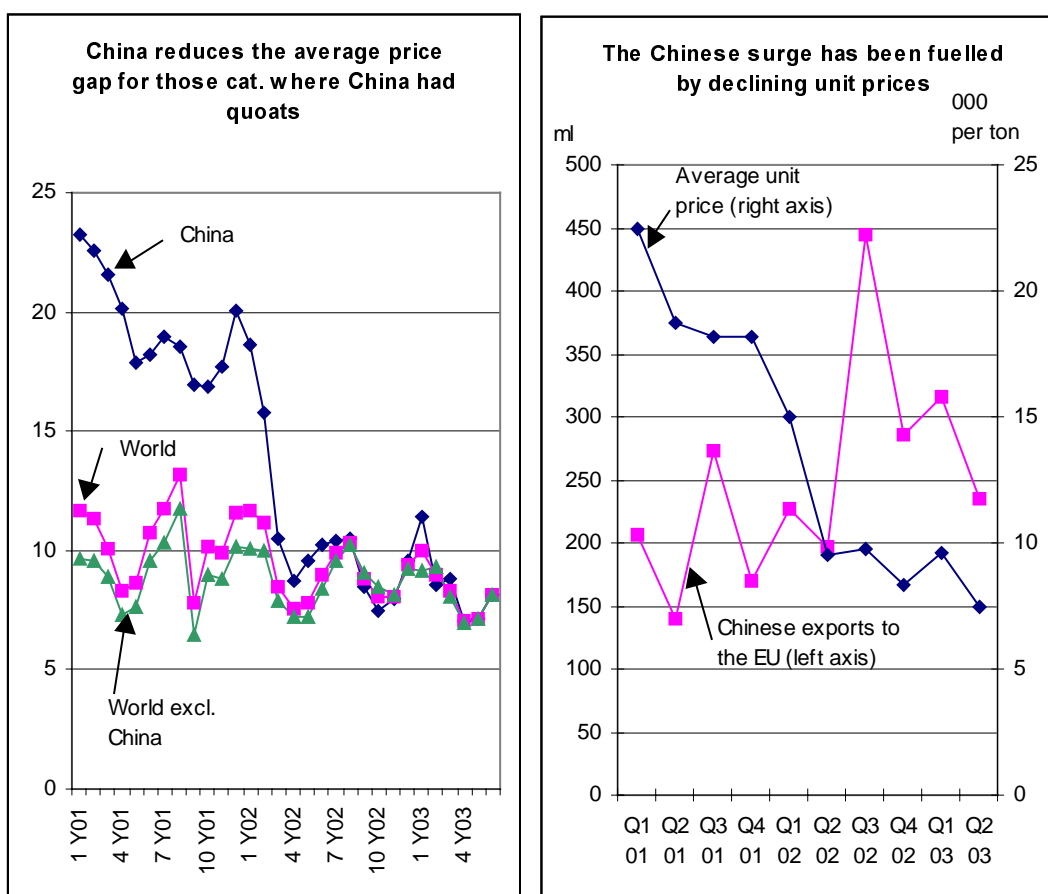
¹⁰ As compared with the first semester of 2002, EU imports from China increased by 29.7% in value and 75.9% in volume while average unit price decreased by 27%.

¹¹ Med3 : Turkey, Tunisia and Morocco

The analysis also reveals that the impact on these product categories on developing countries/small suppliers was quite severe, with South Asia the main loser (-37% in value term after 12 months). Also countries with trade preferences could not fare better (Bangladesh: -25%, Morocco: -7,5%, Tunisia: -2,3, candidate countries: -1,6%). Pakistan did well and resisted the Chinese storm with increases in value and volume. While Turkey managed well in value but witnessed a drop in volume.

At the level of categories, these losses are even more pronounced reflecting a higher increase of Chinese exports in the categories concerned (see table XX). For instance category 21, China has doubled its exports in one year, while Bangladesh witnessed a decrease of 37%, Tunisia 8,5% and Morocco 7,7%. This is repeated for other categories (see tables in annex).

The Chinese surge seems to have been fuelled by declines in unit prices of the various categories, as shown in the first table below. However, there are indications that the sharp drop of Chinese prices in these categories constituted more an alignment towards average prices of EU imports than a significant undercut of such prices (see second table below).



ANNEXES

- 1. EU TEXTILE AND CLOTHING TRADE**
- 1.1. Evolution of T&C Trade by group of countries**
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 - Morocco
 - Egypt
 - Mauritius
 - South Africa
 - Romania
 - Bulgaria
 - Poland
 - Mexico
 - Brazil
 - Argentina
 - Switzerland
 - USA
 - Japan
 - China
 - India
 - Pakistan
 - Indonesia
 - Malaysia
 - Thailand

- Bangladesh
- Philippines
- Laos
- Sri Lanka
- Vietnam
- Cambodia
- Hong Kong
- S. Korea
- Taiwan
- Macao

2. EVOLUTION OF TRADE IN TEXTILE AND CLOTHING TRADE WORLD-WIDE

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3. SURVEY OF STUDIES ON IMPACT OF MFA PHASE-OUT

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4.9. Categories 3rd stage 2000 to 2002

4.10. Categories integrated in the 3rd stage of ATC where China had quotas

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4.12. Categories liberalised during the 3rd stage of ATC where China had quotas

1. EU TEXTILE AND CLOTHING TRADE

1.1. Evolution of T&C Trade by group of countries

Evolution of main grouping Textiles & clothing trade

Pan Euro Med Turquie and others*	1995					2001					2002					Imports Change in % 1995-2002	Exports Change in % 1995-2002
	Imports	Exports	Balance	In % of total EU T&C imports	In % of total EU T&C exports	Imports	Exports	Balance	In % of total EU T&C imports	In % of total EU T&C exports	Imports	Exports	Balance	In % of total EU T&C imports	In % of total EU T&C exports		
Ch. 50-60	4.081.892	9.100.509	5.018.617	28,5	52,7	5.834.058	14.493.558	8.659.500	32,8	57,4	5.631.646	14.605.979	8.974.333	34,6	58,2	38,0	60,5
Ch. 61-63	13.639.730	4.902.426	-8.737.303	44,1	41,0	24.121.893	7.955.630	-16.166.263	44,1	43,3	24.979.938	8.271.150	-16.708.788	45,5	45,1	83,1	68,7
Ch. 50-63	17.721.621	14.002.935	-3.718.686	39,2	47,9	29.955.951	22.449.188	-7.506.764	41,3	51,5	30.611.584	22.877.129	-7.734.455	43,0	52,7	72,7	63,4
* Algeria, Bulgaria, Cyprus, Czech Republic, Egypt, Estonia, Hungary, Iceland, Israel, Jordan, Latvia, Lebanon, Liechtenstein, Lithuania, Malta, Morocco, Norway, Poland, Romania, Slovakia, Slovenia, Switzerland, Syria, Tunisia, Turkey, WBGS																	
Other* Europe	Imports	Exports	Balance			Imports	Exports	Balance			Imports	Exports	Balance				
Ch. 50-60	959.493	1.029.456	69.963	6,7	6,0	664.483	1.781.083	1.116.600	3,7	7,1	588.464	1.823.461	1.234.997	3,6	7,3	-38,7	77,1
Ch. 61-63	988.025	547.995	-440.030	3,2	4,6	1.907.921	1.575.691	-332.230	3,5	8,6	1.841.150	1.879.566	38.416	3,4	10,3	86,3	243,0
Ch. 50-63	1.947.517	1.577.450	-370.067	4,3	5,4	2.572.403	3.356.773	784.370	3,5	7,7	2.429.613	3.703.027	1.273.413	3,4	8,5	24,8	134,7
* Armenia, Azerbaijan, Belarus, Bosnia-Herzegovina, Croatia, Former Yugoslav Republic of Macedonia, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Russia, Serbia & Montenegro, Tadjikistan, Turkmenistan, Ukraine, Uzbekistan																	
China	Imports	Exports	Balance			Imports	Exports	Balance			Imports	Exports	Balance				
Ch. 50-60	850.012	274.938	-575.074	5,9	1,6	1.592.207	523.435	-1.068.772	8,9	2,1	1.627.286	584.594	-1.042.693	10,0	2,3	91,4	112,6
Ch. 61-63	3.956.915	14.771	-3.942.144	12,8	0,1	8.841.392	66.873	-8.774.519	16,2	0,4	9.695.164	72.906	-9.622.258	17,6	0,4	145,0	393,6
Ch. 50-63	4.806.927	289.710	-4.517.218	10,6	1,0	10.433.599	590.309	-9.843.290	14,4	1,4	11.322.450	657.500	-10.664.951	15,9	1,5	135,5	127,0
Asia	Imports	Exports	Balance			Imports	Exports	Balance			Imports	Exports	Balance				
Ch. 50-60	3.635.011	2.015.419	-1.619.593	25,4	11,7	4.905.485	2.419.692	-2.485.794	27,5	9,6	4.675.216	2.869.069	-1.806.147	28,8	11,4	28,6	42,4
Ch. 61-63	10.352.854	1.334.334	-9.018.520	33,5	11,2	17.203.221	1.397.489	-15.805.733	31,5	7,6	16.486.059	2.137.336	-14.348.723	30,0	11,7	59,2	60,2
Ch. 50-63	13.987.865	3.349.753	-10.638.112	30,9	11,5	22.108.707	3.817.180	-18.291.526	30,5	8,7	21.161.275	5.006.405	-16.154.870	29,7	11,5	51,3	49,5
Latin America	Imports	Exports	Balance			Imports	Exports	Balance			Imports	Exports	Balance				
Ch. 50-60	468.899	434.085	-34.814	3,3	2,5	405.556	513.145	107.589	2,3	2,0	387.237	441.914	54.677	2,4	1,8	-17,4	1,8
Ch. 61-63	244.095	191.840	-52.255	0,8	1,6	256.373	323.280	66.907	0,5	1,8	284.568	256.777	-27.791	0,5	1,4	16,6	33,8
Ch. 50-63	712.994	625.925	-87.069	1,6	2,1	661.929	836.425	174.496	0,9	1,9	671.805	698.691	26.886	0,9	1,6	-5,8	11,6
ACP (exc S.)	Imports	Exports	Balance			Imports	Exports	Balance			Imports	Exports	Balance				
Ch. 50-60	442.264	372.591	-69.673	3,1	2,2	652.222	672.340	-20.118	3,7	2,7	361.794	466.463	104.669	2,2	1,9	-18,2	25,2
Ch. 61-63	668.027	266.004	-402.023	2,2	2,2	1.192.766	473.130	-719.636	2,2	2,6	898.762	427.677	-471.085	1,6	2,3	34,5	60,8
Ch. 50-63	1.110.291	638.595	-471.696	2,5	2,2	1.844.988	1.145.470	-699.518	2,5	2,6	1.260.555	894.140	-366.415	1,8	2,1	13,5	40,0
Industrialised countries*	Imports	Exports	Balance			Imports	Exports	Balance			Imports	Exports	Balance				
Ch. 50-60	3.060.914	3.147.555	86.641	21,3	18,2	3.218.202	3.886.438	668.236	18,1	15,4	2.696.442	3.658.522	962.080	16,6	14,6	-11,9	16,2
Ch. 61-63	713.355	3.433.653	2.720.298	2,3	28,7	676.713	5.250.349	4.573.636	1,2	28,6	569.331	4.715.052	4.145.721	1,0	25,7	-20,2	37,3
Ch. 50-63	3.774.269	6.581.208	2.806.939	8,3	22,5	3.894.914	9.136.787	5.241.872	5,4	20,9	3.265.774	8.373.574	5.107.801	4,6	19,3	-13,5	27,2
* Australia, Canada, Japan, New Zealand, USA																	
S. AF & Mexico	Imports	Exports	Balance			Imports	Exports	Balance			Imports	Exports	Balance				
Ch. 50-60	285.925	236.275	-49.650	2,0	1,4	238.554	402.548	163.994	1,3	1,6	234.974	452.787	217.813	1,4	1,8	-17,8	91,6
Ch. 61-63	71.726	76.758	5.032	0,2	0,6	123.226	222.622	99.396	0,2	1,2	130.804	271.782	140.979	0,2	1,5	82,4	254,1
Ch. 50-63	357.651	313.034	-44.617	0,8	1,1	361.780	625.170	263.390	0,5	1,4	365.778	724.569	358.791	0,5	1,7	2,3	131,5
extra-EU	Imports	Exports	Balance			Imports	Exports	Balance			Imports	Exports	Balance				
Ch. 50-60	14.337.558	17.284.620	2.947.061	100,0	100,0	17.810.631	25.247.224	7.436.593	100,0	100,0	16.259.397	25.101.292	8.841.895	100,0	100,0	13,4	45,2
Ch. 61-63	30.914.202	11.949.204	-18.964.997	100,0	100,0	54.679.351	18.384.117	-36.295.234	100,0	100,0	54.948.898	18.323.862	-36.625.035	100,0	100,0	77,7	53,3
Ch. 50-63	45.251.760	29.233.824	-16.017.936	100,0	100,0	72.489.982	43.631.341	-28.858.641	100,0	100,0	71.208.295	43.425.155	-27.783.140	100,0	100,0	57,4	48,5

EU T&C Trade in 2002
Ranked by import value - 2002

Rank	Suppliers	Imports		Exports		Balance	year 2000			
		Value ('000 €)	Quantity (Tons)	Value ('000 €)	Quantity (Tons)		Population (thousands)	GDP (millions of dollars)	GDP per capita (dollars)	Exports per capita
	Extra EU	71.616.971	8.845.726	43.780.163	5.045.354	-27.836.808	6.056.715	31.362.624	5.178	12
1	China	11.325.766	1.201.493	657.493	136.058	-10.668.273	1.252.948	1.079.948	862	8,3
2	Turkey	8.941.484	924.421	1.857.702	404.528	-7.083.782	66.668	199.937	2.999	122,0
3	India	3.998.825	653.569	203.636	96.995	-3.795.189	1.008.937	456.990	453	4,1
4	Romania	3.832.677	218.258	2.617.016	262.644	-1.215.662	22.438	36.719	1.636	154,3
5	Tunisia	3.102.529	184.745	2.077.323	256.566	-1.025.206	9.459	19.462	2.058	326,9
6	Bangladesh	2.827.875	382.791	29.718	4.137	-2.798.156	137.439	47.106	343	21,4
7	Morocco	2.730.199	162.552	1.754.672	189.690	-975.526	29.878	33.345	1.116	92,0
8	Poland	2.392.637	239.977	2.620.458	373.017	227.821	38.605	157.751	4.086	67,5
9	Hong Kong	2.329.703	130.918	1.463.585	68.774	-866.118	6.860	162.642	23.709	384,8
10	Indonesia	1.982.282	313.929	142.314	24.702	-1.839.968	212.092	153.255	723	11,1
11	Pakistan	1.950.638	435.786	57.325	46.998	-1.893.314	141.256	61.638	436	12,8
12	Czech Rep.	1.622.621	257.213	1.608.527	251.913	-14.094	10.272	50.777	4.943	149,7
13	USA	1.580.334	301.174	5.191.868	381.628	3.611.534	283.230	9.810.200	34.637	6,7
14	South Korea	1.558.750	286.288	766.574	50.431	-792.175	46.740	457.219	9.782	37,4
15	Switzerland	1.503.863	145.653	3.426.757	171.481	1.922.894	7.170	239.450	33.394	226,6
16	Hungary	1.254.583	122.047	1.323.585	156.698	69.002	9.968	45.633	4.578	137,5
17	Thailand	1.116.502	134.137	156.903	13.641	-959.598	62.806	122.166	1.945	18,5
18	Bulgaria	1.009.093	75.593	881.896	101.639	-127.196	7.949	11.995	1.509	136,6
19	Taiwan	918.413	189.982	311.150	22.266	-607.264	22.185	309.377	13.946	45,8
20	Sri Lanka	766.832	79.799	122.393	7.991	-644.440	18.924	16.305	862	42,8
21	Slovakia	744.798	80.043	611.407	64.551	-133.391	5.399	19.121	3.542	130,4
22	Lithuania	736.183	61.489	501.428	77.119	-234.755	3.696	11.314	3.061	192,7
23	Vietnam	721.634	63.009	66.465	4.851	-655.169	78.137	31.344	401	10,3
24	Japan	688.597	79.769	2.142.484	81.075	1.453.887	127.096	4.765.313	37.494	6,1
25	Australia	677.338	180.220	376.488	45.605	-300.850	19.138	388.461	20.298	44,7
26	Mauritius	624.336	37.255	70.414	5.106	-553.922	1.161	4.381	3.773	581,2
27	Egypt	594.863	111.196	153.561	37.238	-441.302	67.884	98.725	1.454	8,9
28	Croatia	525.530	27.929	579.945	48.395	54.415	4.654	19.031	4.089	124,0
29	Slovenia	505.983	66.970	637.403	65.689	131.420	1.988	18.129	9.121	289,2
30	Macao	494.271	22.541	19.480	1.268	-474.792	444	6.208	13.973	1.363,7

1.2. EU Trade in T&C by country, 2002

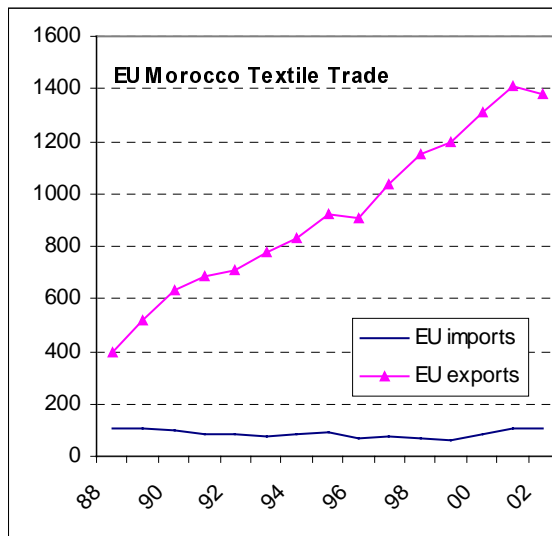
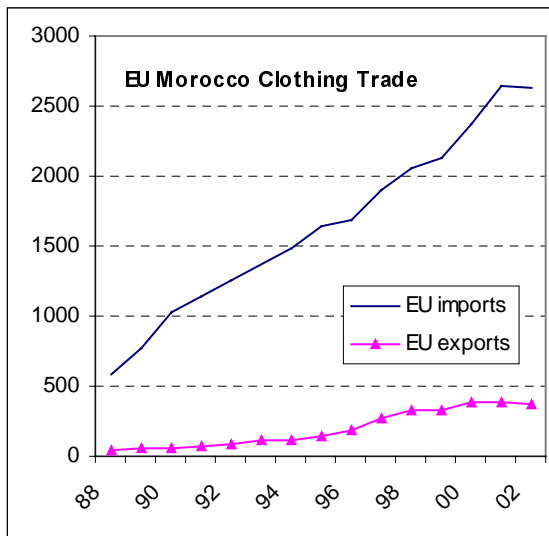
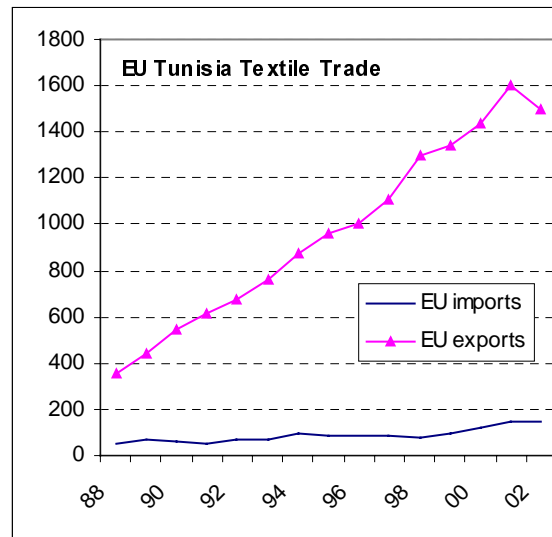
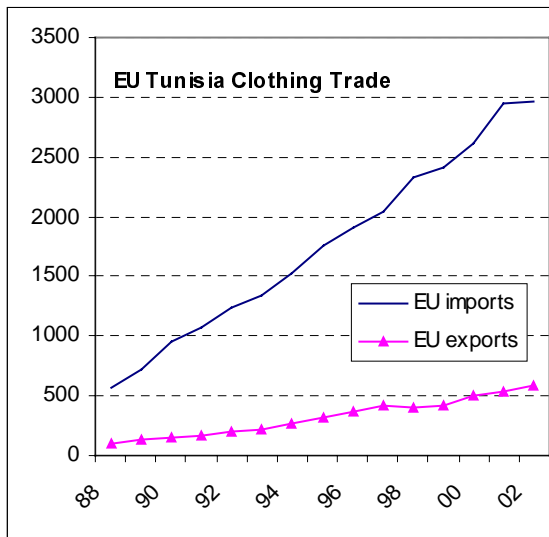
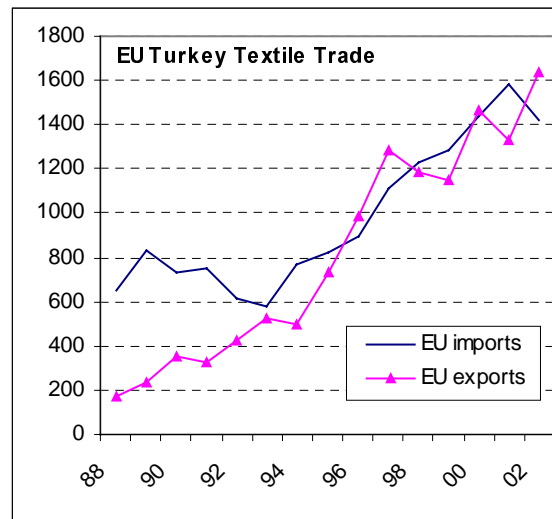
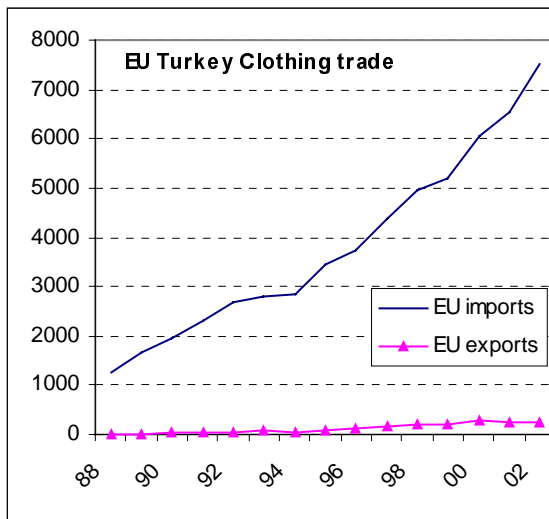
Rank	Suppliers	Imports		Exports		Balance	year 2000			
		Value ('000 €)	Quantity (Tons)	Value ('000 €)	Quantity (Tons)		Population (thousands)	GDP (millions of dollars)	GDP per capita (dollars)	Exports per capita
	Extra EU	767.980	373.811	3.050.151	606.672	2.282.171	6.056.715	31.362.624	5.178	0
72	Cyprus	50.342	3.026	200.030	12.208	149.687	784	8.698	11.097	70,4
73	Secr.Extra	45.195	3.901	126.307	44.247	81.113				
74	Cameroon	41.993	37.944	50.866	37.550	-8.873	14.876	8.879	597	3,3
75	Mali	41.196	36.546	45.273	5.326	4.077	11.351	2.298	202	2,1
76	Chad	36.389	31.819	3.286	1.826	-33.103	7.885	1.407	178	6,1
77	Turkmenistan	33.924	15.638	1.285	88	-32.639	4.737	4.404	930	10,1
78	Mongolia	28.977	1.997	2.370	732	-26.607	2.533	969	383	14,2
79	Saudi Arabia	27.625	22.387	586.201	60.909	558.576	20.346	173.287	8.517	1,3
80	Ivory Coast	26.161	16.884	25.413	7.819	-748	16.013	9.370	585	3,2
81	Burkina Faso	24.874	21.486	4.781	3.020	-20.093	11.535	2.192	190	3,2
82	Maldives	21.410	1.925	859	94	-20.550	291	556	1.912	68,3
83	Honduras	19.976	8.493	2.633	121	-17.343	6.417	5.932	924	2,8
84	Kasakhstan	18.753	16.248	47.460	6.113	28.708	16.172	18.230	1.127	1,4
85	Sudan	18.136	19.466	2.844	776	-15.292	31.095	11.516	370	0,7
86	Nigeria	16.267	10.957	109.013	17.916	92.746	113.862	41.085	361	0,2
87	Chile	14.554	3.850	111.301	20.468	96.747	15.211	70.545	4.638	0,8
88	Tanzania	13.866	10.845	17.343	15.164	3.476	35.119	9.027	257	0,6
89	Lebanon	13.808	1.140	224.900	17.336	211.092	3.496	16.488	4.716	4,2
90	Zambia	13.564	5.376	4.109	1.424	-9.455	10.421	2.911	279	2,4
91	Benin	12.570	11.602	52.102	22.188	39.532	6.272	2.168	346	3,5
92	Dominican R.	12.535	3.128	52.296	4.174	39.761	8.373	19.669	2.349	1,4
93	Ecuador	12.094	7.286	14.223	3.938	2.130	12.646	13.607	1.076	1,1
94	North Korea	11.765	870	7.400	603	-4.365	22.268	..	..	0,9
95	Jordan	11.159	1.035	69.907	13.455	58.748	4.913	8.340	1.697	2,9
96	Paraguay	10.866	8.454	4.429	882	-6.436	5.496	7.521	1.368	2,2
97	Mozambique	10.760	10.200	4.855	3.639	-5.905	18.292	3.754	205	0,9
98	El Salvador	10.185	3.501	8.531	693	-1.654	6.278	13.211	2.104	1,6
99	Uganda	8.578	5.970	8.135	5.252	-443	23.300	6.170	265	0,4
100	Afghanistan	7.881	649	1.515	1.246	-6.366	21.765	..	..	0,7
101	Botswana	7.820	586	520	70	-7.300	1.541	5.285	3.429	12,8
102	Swaziland	7.534	1.017	272	26	-7.262	925	1.478	1.599	10,1
103	Kenya	7.412	6.341	51.738	42.059	44.325	30.669	10.357	338	0,2
104	Armenia	6.136	143	11.882	572	5.746	3.787	1.914	505	1,4
105	Guatemala	6.050	671	19.157	2.022	13.107	11.385	18.988	1.668	0,4
106	Centr.Africa	5.748	5.262	2.168	1.575	-3.581	3.717	963	259	1,8
107	Ethiopia	5.404	1.615	4.773	2.131	-631	62.908	6.391	102	0,0
108	Ghana	5.116	4.473	38.432	30.713	33.317	19.306	5.190	269	0,2
109	Andorra	4.972	829	90.034	2.798	85.061	86	..	..	62,6
110	Senegal	4.899	3.499	24.870	9.692	19.971	9.421	4.371	464	0,4
111	Oman	4.429	870	16.152	1.654	11.723	2.538	19.825	7.811	0,7
112	Cape Verde	4.393	232	6.610	1.215	2.217	427	558	1.307	9,0
113	Falkland Is.	4.285	1.807	465	59	-3.820	2	..	..	2.188,8
114	Togo	4.253	3.694	46.951	25.561	42.697	4.527	1.219	269	1,4
115	Costa Rica	4.221	152	13.822	1.360	9.600	4.024	15.851	3.940	1,4

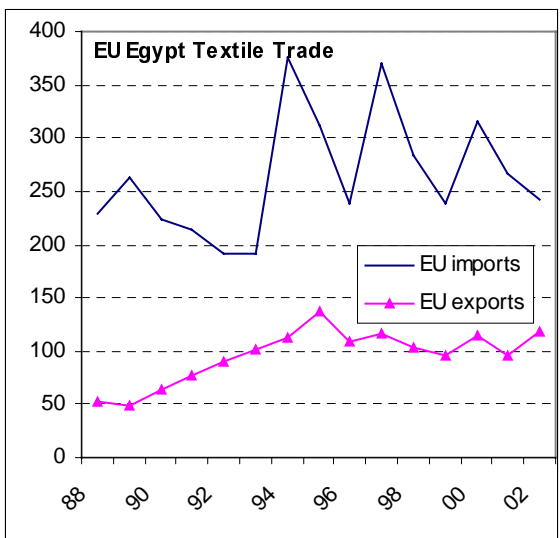
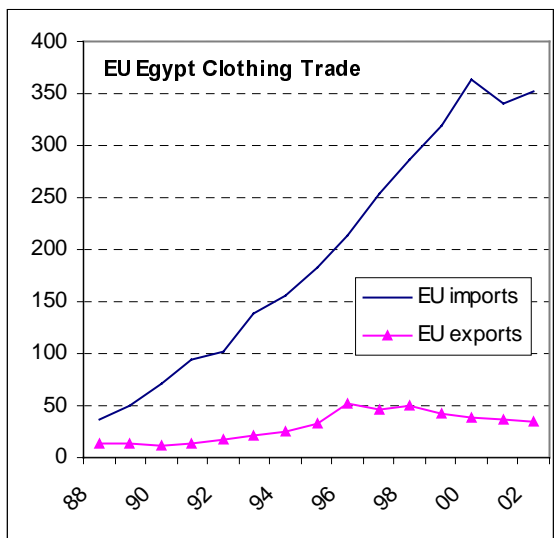
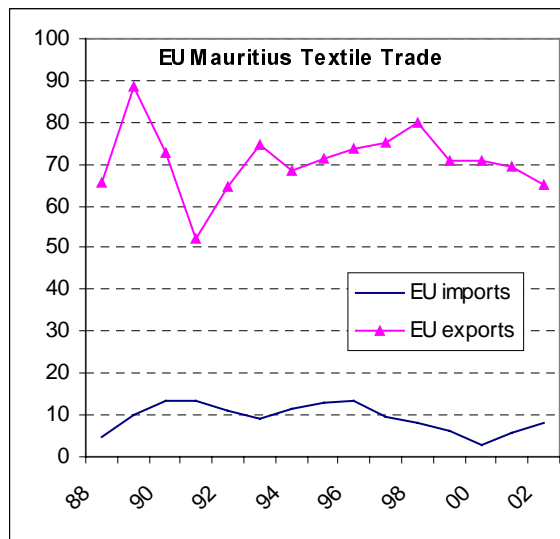
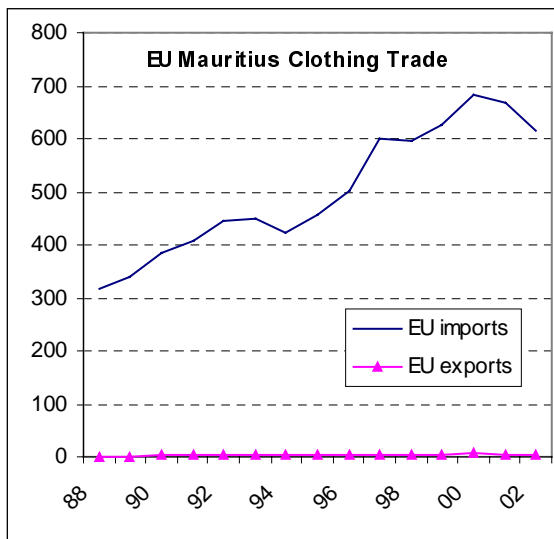
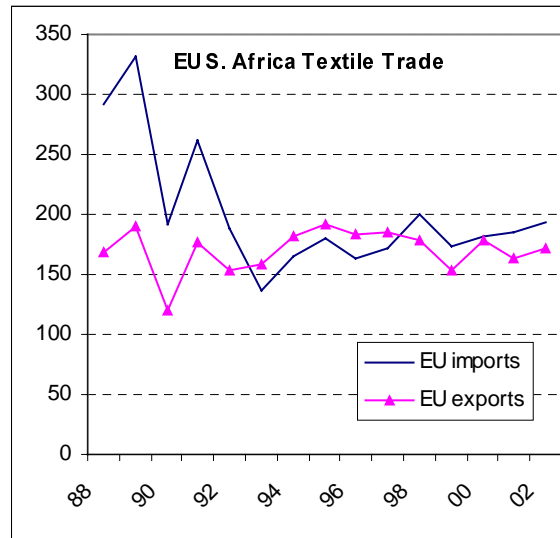
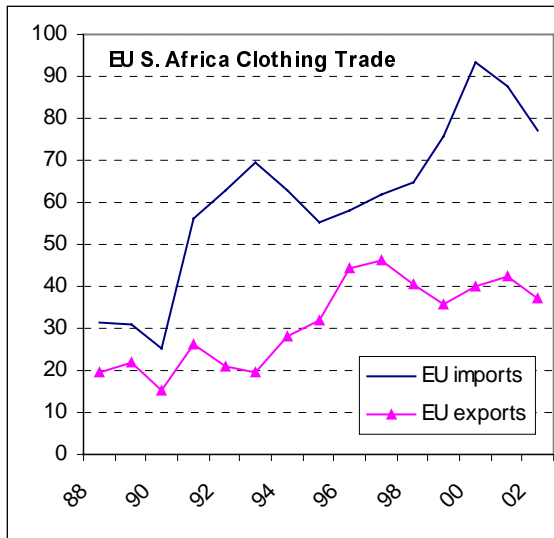
Rank	Suppliers	Imports		Exports		Balance	year 2000			
		Value ('000 €)	Quantity (Tons)	Value ('000 €)	Quantity (Tons)		Population (thousands)	GDP (millions of dollars)	GDP per capita (dollars)	Exports per capita
	Extra EU	8.557.831	1.674.984	11.350.193	1.592.662	2.792.362	6.056.715	31.362.624	5.178	1
31	Malaysia	482.398	74.892	73.398	13.733	-409.000	22.218	89.659	4.035	21,9
32	Ukraine	443.124	38.653	575.398	86.260	132.274	49.568	31.791	641	8,8
33	Cambodia	422.085	26.479	4.201	526	-417.884	13.104	3.183	243	30,1
34	Israel	364.588	55.549	367.030	49.815	2.441	6.040	110.386	18.274	68,2
35	Philippines	337.627	38.013	96.052	7.728	-241.575	75.653	74.733	988	4,4
36	Estonia	331.225	38.226	265.611	34.580	-65.614	1.393	4.969	3.566	243,8
37	Myanmar	325.102	23.353	6.175	274	-318.927	47.749	..	..	8,2
38	Russia	281.387	63.720	1.520.419	107.528	1.239.032	145.491	251.106	1.726	2,0
39	Latvia	271.125	24.431	216.787	22.114	-54.339	2.421	7.150	2.954	119,6
40	Syria	269.916	122.954	63.449	20.722	-206.467	16.189	..	..	16,8
41	South Africa	269.619	58.663	208.867	45.718	-60.752	43.309	125.887	2.907	6,3
42	N.det.Intra	256.906	16.912	210.089	38.184	-46.818	..	..	..	..
43	Iran	247.910	19.450	65.254	22.594	-182.657	70.330	104.904	1.492	4,3
44	Brazil	242.790	92.097	198.071	24.468	-44.719	170.406	595.458	3.494	1,4
45	U.A.Emirates	235.292	27.521	335.853	32.700	100.560	2.606	..	..	108,0
46	For.JRep.Mac	230.696	12.085	210.362	22.463	-20.335	0	0	0	0,0
47	Uzbekistan	204.620	152.851	6.124	592	-198.496	24.881	7.666	308	10,7
48	New Zealand	188.811	61.910	78.793	8.889	-110.018	3.778	50.781	13.441	52,4
49	Secr.Intra	187.544	26.985	300.656	114.025	113.112	..	..	..	..
50	Belarus	166.006	30.063	139.648	18.941	-26.358	10.187	10.408	1.022	17,3
51	Malta	163.041	13.649	116.225	8.538	-46.816	390	3.565	9.142	404,9
52	Madagascar	152.059	16.042	41.763	7.542	-110.296	15.970	3.878	243	17,6
53	Serb.Monten.	144.093	12.363	230.020	32.700	85.927	0	0	0	0,0
54	Canada	130.516	18.268	583.056	49.491	452.540	30.757	700.572	22.778	5,0
55	Norway	126.729	17.571	1.044.485	65.856	917.755	4.469	161.769	36.198	28,0
56	Laos	122.822	12.409	1.320	143	-121.502	5.279	1.709	324	24,7
57	Bosnia Herz.	112.084	8.117	124.155	15.728	12.071	3.977	4.394	1.105	30,9
58	Moldova	103.128	11.252	90.428	14.123	-12.700	4.295	1.286	299	26,3
59	Peru	101.439	7.550	23.227	5.933	-78.212	25.662	53.466	2.084	4,1
60	Argentina	100.547	29.486	36.615	5.513	-63.932	37.032	284.960	7.695	2,7
61	Albania	96.395	13.557	136.335	30.788	39.940	3.134	3.752	1.197	42,6
62	Mexico	96.161	17.036	515.455	46.725	419.295	98.872	574.512	5.811	0,9
63	Nepal	78.598	6.857	2.695	925	-75.903	23.043	5.497	239	4,9
64	Jamaica	76.938	3.466	3.074	435	-73.865	2.576	7.403	2.874	32,8
65	Uruguay	72.866	19.213	10.180	1.555	-62.686	3.337	19.715	5.908	21,5
66	Singapore	71.881	3.631	191.502	11.853	119.621	4.018	92.252	22.959	25,2
67	Bahrain	60.331	19.722	46.685	2.779	-13.646	640	7.971	12.459	93,0
68	N.det.Extra	58.281	481	85.411	3.370	27.131	..	..	..	..
69	Zimbabwe	55.402	25.455	4.422	789	-50.980	12.627	7.392	585	6,8
70	Colombia	55.016	4.797	69.695	9.090	14.678	42.105	81.283	1.931	1,4
71	Tadjikistan	52.750	35.447	1.058	260	-51.692	6.087	991	163	9,2

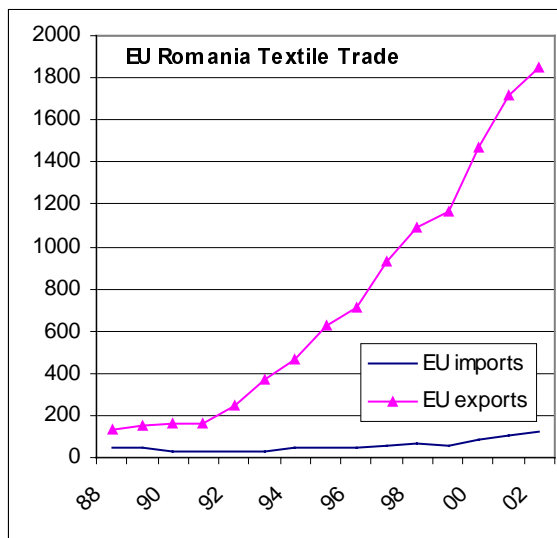
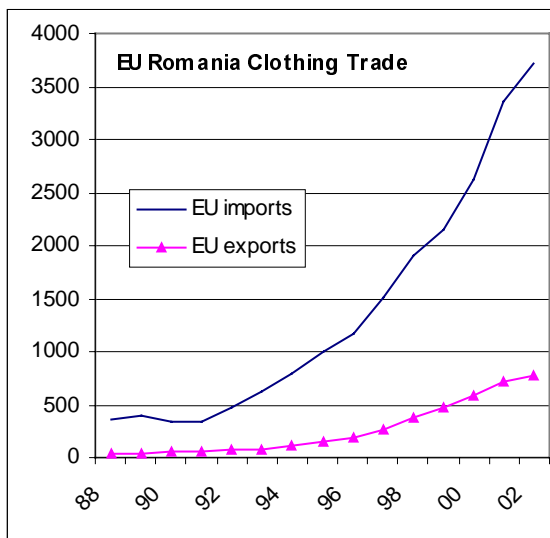
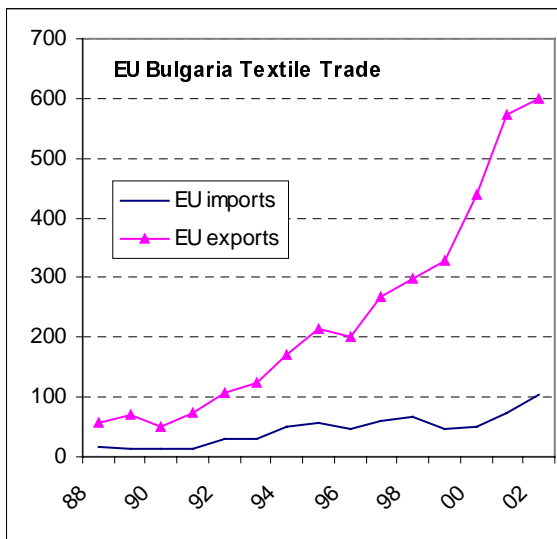
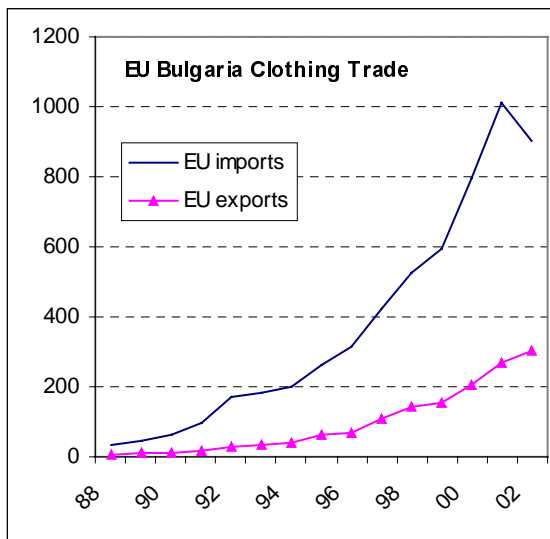
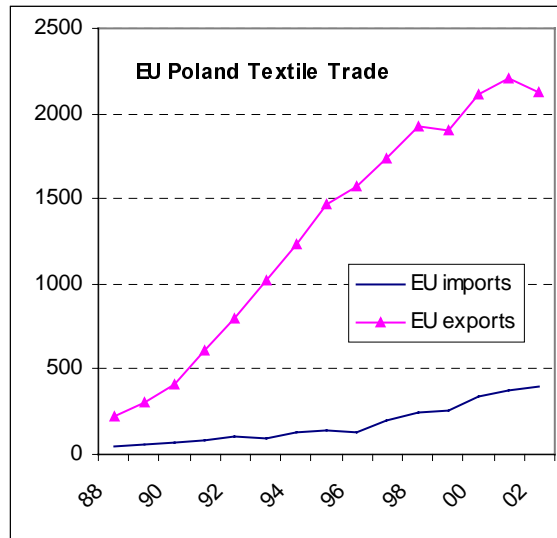
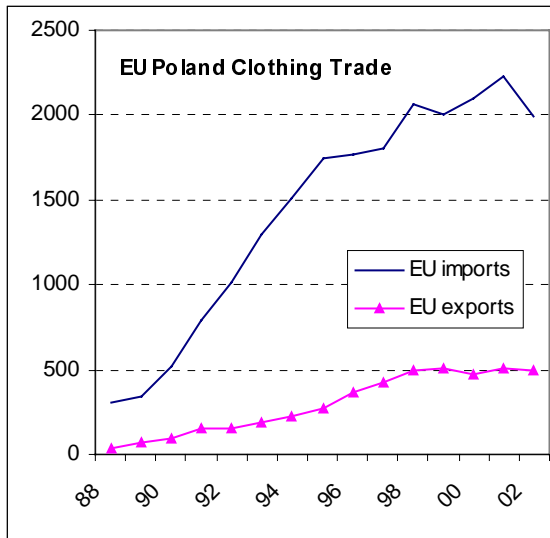
Rank	Suppliers	Imports		Exports		Balance	year 2000			
		Value ('000 €)	Quantity (Tons)	Value ('000 €)	Quantity (Tons)		Population (thousands)	GDP (millions of dollars)	GDP per capita (dollars)	Exports per capita
	Extra EU	69.904	19.999	932.638	175.961	862.735	6.056.715	31.362.624	5.178	0
116	Georgia	4.206	517	10.681	2.062	6.475	5.262	3.029	576	0,9
117	Bolivia	3.585	147	2.991	504	-595	8.329	8.281	994	0,5
118	Kyrgyzstan	3.560	3.049	1.716	276	-1.844	4.921	1.304	265	0,9
119	San Marino	3.555	55	4.349	215	794	27	..	..	132,3
120	Kuwait	3.439	718	177.576	6.993	174.137	1.914	37.783	19.736	1,9
121	Brunei	3.231	323	2.089	877	-1.143	328	..	..	10,6
122	Azerbaijan	3.190	1.834	14.952	1.154	11.762	8.041	5.267	655	0,5
123	Turks,Caicos	3.105	865	325	31	-2.780	17	..	..	6,2
124	Guinea	2.912	2.628	16.779	10.589	13.867	8.154	3.012	369	0,6
125	Tokelau	2.751	135	1.589	331	-1.162	1	..	..	221,9
126	Guinea Biss.	2.740	2.392	830	626	-1.911	1.199	215	180	1,2
127	Algeria	2.705	932	144.939	49.717	142.234	30.291	53.306	1.760	0,1
128	West. Samoa	2.106	15	554	21	-1.553	0	0	0	0,0
129	Lesotho	2.022	128	102	68	-1.921	2.035	899	442	1,9
130	Qatar	2.001	466	39.217	2.093	37.215	565	14.473	25.595	3,1
131	Sierra Leone	1.820	137	15.765	2.663	13.945	4.405	636	144	0,1
132	Yemen	1.610	1.309	5.632	1.412	4.022	18.349	8.532	465	0,1
133	Niger	1.570	965	16.179	8.389	14.609	10.832	1.826	169	0,4
134	Vatican City	1.563	105	698	36	-865	0	0	0	0,0
135	North.Mar.Is	1.528	44	16.136	573	14.608	0	0	0	0,0
136	Antigua,Barb	1.500	70	2.291	122	791	65	689	10.617	9,0
137	Cuba	1.331	214	24.421	2.909	23.090	11.199	..	..	0,1
138	Venezuela	1.296	366	72.940	7.425	71.644	24.170	120.484	4.985	0,2
139	Panama	1.260	349	32.161	1.597	30.900	2.856	9.889	3.463	0,6
140	Surinam	1.236	457	4.324	1.264	3.088	0	0	0	0,0
141	Namibia	912	319	959	113	47	1.757	3.479	1.981	0,3
142	Mauritania	887	67	14.960	4.429	14.073	2.665	935	351	0,5
143	Nicaragua	610	113	985	210	375	5.071	2.396	473	0,1
144	Fiji	599	16	589	84	-10	814	1.495	1.838	2,9
145	Liberia	589	26	1.615	793	1.025	2.913	..	..	0,0
146	Haiti	587	130	935	129	348	8.142	4.050	497	0,1
147	Guam	428	2	5.026	50	4.597	155	..	..	0,6
148	St Lucia	385	49	493	40	108	148	707	4.785	2,5
149	Brit.Virg.Isl.	341	2	766	147	425	24	..	..	10,9
150	Rwanda	327	35	4.220	3.430	3.893	7.609	1.794	236	0,0
151	Virgin Isles	309	26	572	37	263	0	0	0	0,0
152	East Timor	308	15	276	49	-32	..	..	..	..
153	Faroe Isles	279	251	17.354	1.225	17.075	46	..	..	9,1
154	St.Ch.&Nevis	272	34	733	308	460	38	314	8.164	0,6
155	Trinidad,Tob	195	51	5.408	922	5.214	1.294	7.312	5.649	0,3
156	Equat.Guinea	184	197	5.281	1.662	5.097	8.154	3.012	369	0,0
157	Gambia	180	23	5.067	1.784	4.887	..	..	..	..
158	Belize	176	61	346	31	170	..	..	..	..
159	S.Tome,Princ	169	5	3.452	769	3.283	138	46	338	0,0
160	Ni Antilles	149	22	13.451	843	13.302	215	2.991	13.892	0,7
161	Greenland	142	1	17.747	1.104	17.605	56	..	..	2,9
162	B.I.O.T.	112	29	379	232	288	..	..	..	..
163	Pitcairn	104	33	35	2	-69	..	..	..	0,0
164	Dominica	103	20	570	31	466	71	270	3.827	4,8
165	Eritrea	103	9	1.236	351	1.133	3.659	608	166	0,0
166	N. Caledonia	96	3	18.919	1.077	18.823	215	3.057	14.200	0,5
167	St.P.Intra	95	6	194	9	99	..	..	..	..
168	Fr.Polynesia	88	2	14.620	998	14.532	8.142	4.050	497	0,0
169	Libyan Arab Jar	84	50	32.544	4.888	32.460	5.290	..	..	0,0
170	Guyana	79	12	545	190	466	761	712	936	0,1

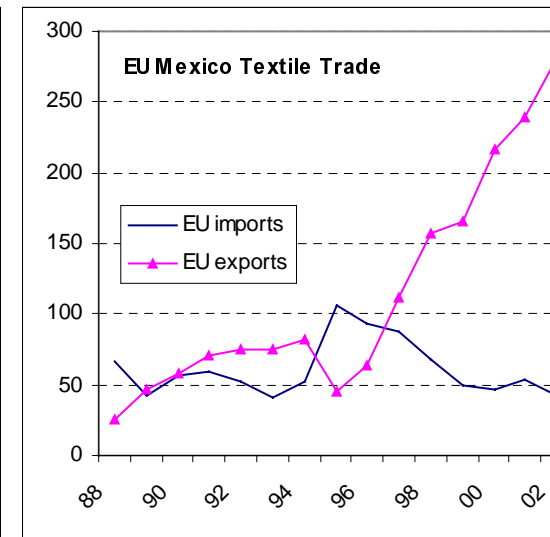
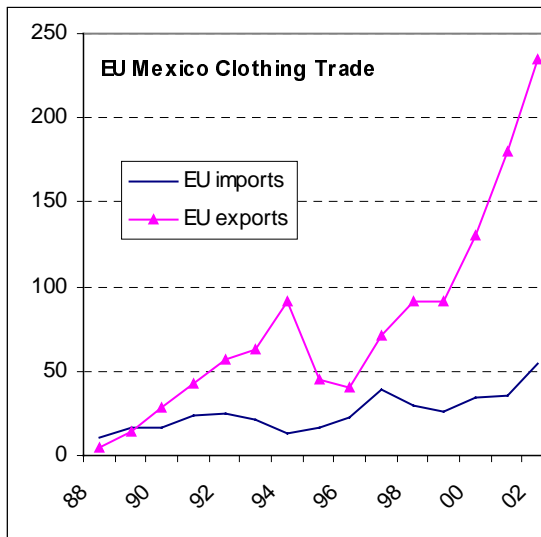
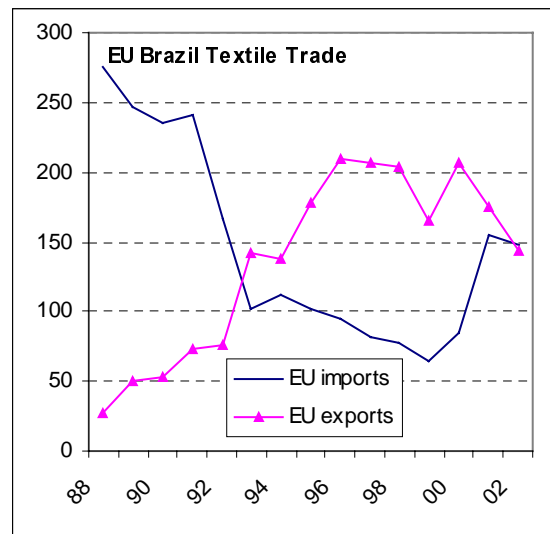
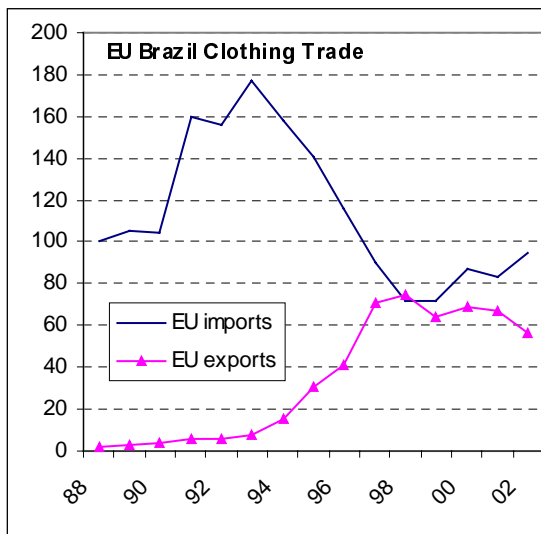
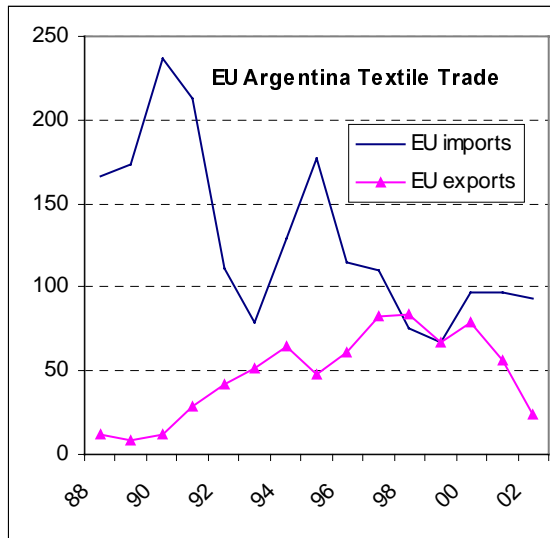
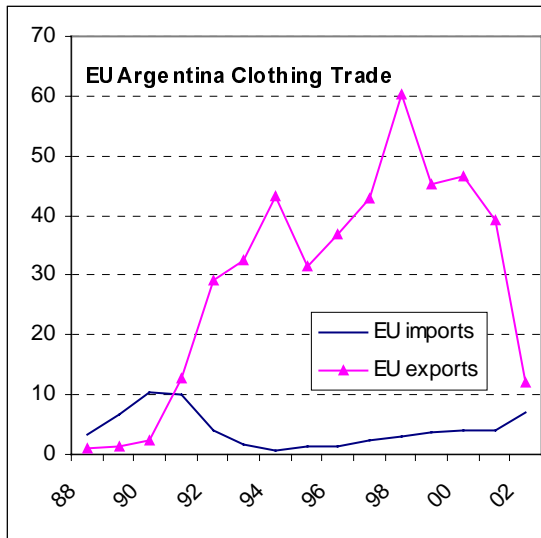
Rank	Suppliers	Imports		Exports		Balance	year 2000			
		Value ('000 €)	Quantity (Tons)	Value ('000 €)	Quantity (Tons)	Value ('000 €)	Population (thousands)	GDP (millions of dollars)	GDP per capita (dollars)	Exports per capita
	Extra EU	1.186	177 0	154.131	48.081	152.945	6.056.715	31.362.624	5.178	0
171	Wallis,Futun	74	56	197	14	124	14 ..	..	..	1,2
172	Bahamas	68	7	3.406	103	3.338	304	4.818	15.837	0,6
173	Seychelles	66	1	1.993	188	1.927	80	614	7.631	0,2
174	Barbados	65	1	2.944	288	2.879	267	2.600	9.718	0,5
175	Gibraltar	64	3	14.519	502	14.455	27 ..	..	..	1,6
176	Papua N.G.	64	2	205	46	141	4.809	3.818	794	0,0
177	Cook Islands	62	7	325	10	263	20 ..	..	..	0,6
178	Niue	62	1	13	0	-50	2 ..	..	..	0,0
179	Angola	59	5	32.257	9.828	32.198	13.134	8.828	672	0,0
180	Bermuda	56	0	6.035	107	5.979	63 ..	..	..	2,2
181	Aruba	55	2	3.982	120	3.928	101 ..	..	..	0,3
182	Kiribati	47	14	18	3	-29	83	43	520	0,3
183	Malawi	41	34	566	604	525	11.308	1.697	150	0,1
184	Anguilla	36	9	201	30	164	11 ..	..	..	3,0
185	St Vincent	36	3	545	37	509	113	333	2.939	0,0
186	Tonga	34	1	347	168	313	99	153	1.547	0,0
187	Congo (Dem. R	31	1	18.606	7.973	18.576	50.948 ..	..	..	0,0
188	Mayotte	29	7	2.841	553	2.812	0	0	0	0,0
189	Saint Helena	25	1	417	28	392	6 ..	..	..	2,7
190	Tuvalu	25	7	44	2	19	10	14	1.364	2,0
191	Djibouti	21	5	5.832	8.403	5.810	632	553	875	0,8
192	Montserrat	21	2	50	2	29	4	23	6.248	19,8
193	Congo	21	1	25.999	11.209	25.978	3.018	3.215	1.065	0,0
194	Christmas Islan	20	1	34	25	14	0	0	0	0,0
195	Cocos Islands(c	16	2	13	2	-3	..	..	..	0,0
196	Iraq	16	0	3.115	292	3.100	22.946 ..	..	..	0,0
197	Heard Island &	13	0	169	9	156	..	..	..	0,0
198	Gabon	12	2	16.146	4.042	16.135	1.230	4.932	4.009	0,0
199	Solomon Is.	10	0	8	0	-2	447	275	614	0,1
200	Marshall Is.	8	1	388	11	380	51	96	1.875	0,1
201	St.P.Extra	5	0	4.550	610	4.545	..	..	..	15,2
202	Cayman Isles	4	0	1.291	142	1.286	38 ..	..	..	1,6
203	Grenada	3	0	319	28	315	94	410	4.389	0,0
204	Gaza + Jericho	3	0	321	105	317	..	..	..	0,0
205	Comoros	3	0	693	282	690	706	202	286	0,1
206	Palau	3	0	0	0	-3	19	144	7.529	0,0
207	Burundi	2	0	3.128	1.862	3.126	6.356	689	108	0,0
208	Antarctica	2	0	33	4	31	..	..	..	0,0
209	American Samc	1	0	245	88	244	159	236	1.487	0,0
210	Bhutan	1	0	78	25	78	2.085	487	234	0,0
211	Somalia	0	0	221	184	220	8.778 ..	..	..	0,0
212	Nauru	0	0	56	3	56	12 ..	..	..	1,8
213	S.Pierre,Miq	0	0	1.479	50	1.479	7 ..	..	..	10,3
214	Vanuatu	0	0	62	16	62	197	212	1.075	0,0
215	Fed.Micron.	0	0	95	1	95	123	228	1.859	0,0
216	US Minor outlyi	0	0	64	7	64	0	0	0	0,0
217	Norfolk Island	0	0	39	1	39	0	0	0	0,0
218	Bouvet Island	0	0	68	26	68	..	..	..	0,0
219	South Georgia	0	0	70	45	70	..	..	..	0,0
220	French Souther	0	0	105	8	105	..	..	..	0,0

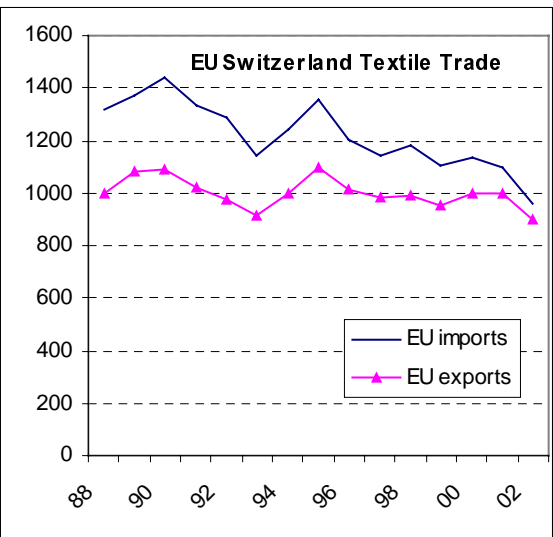
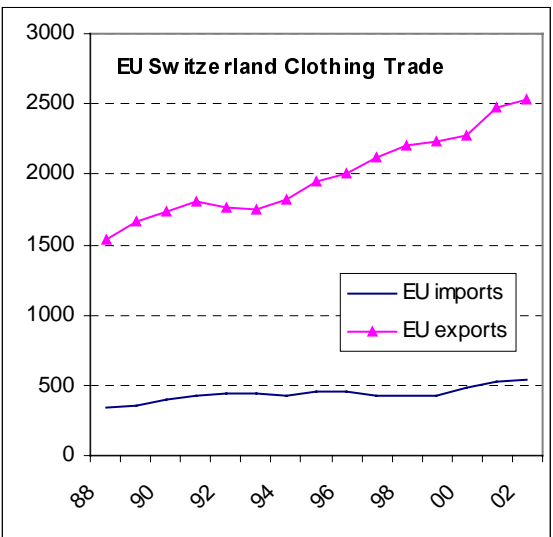
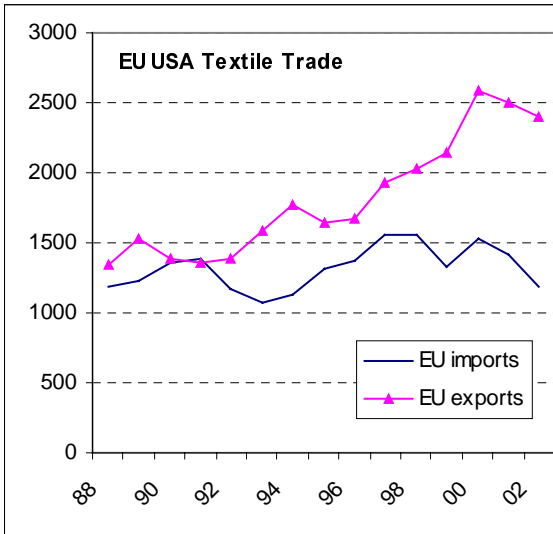
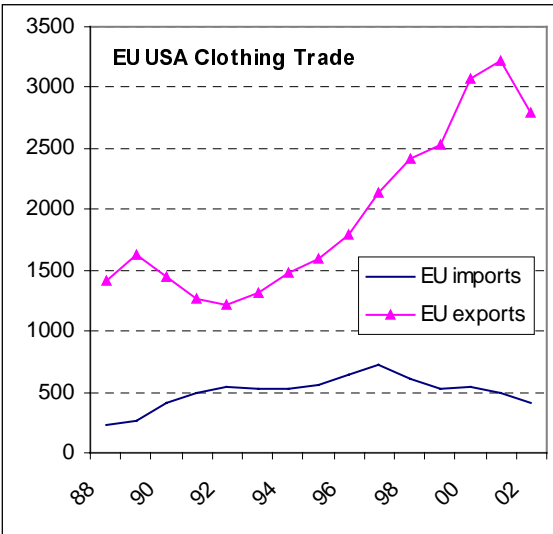
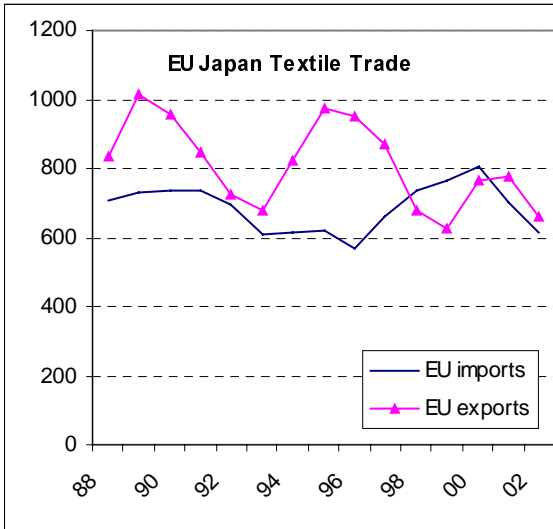
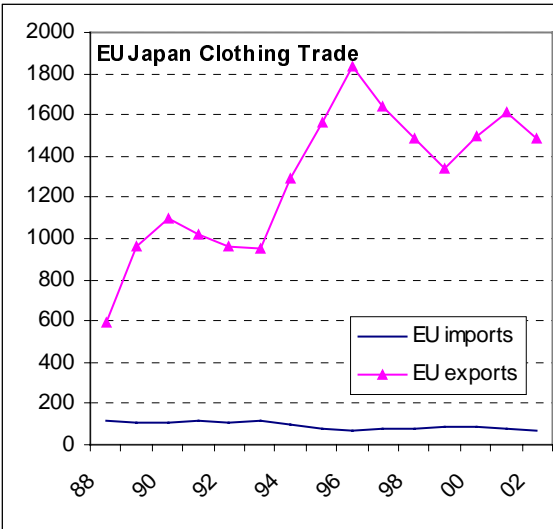
1.3. Evolution of Imports and Exports by country 1988-2002 (in million euro)

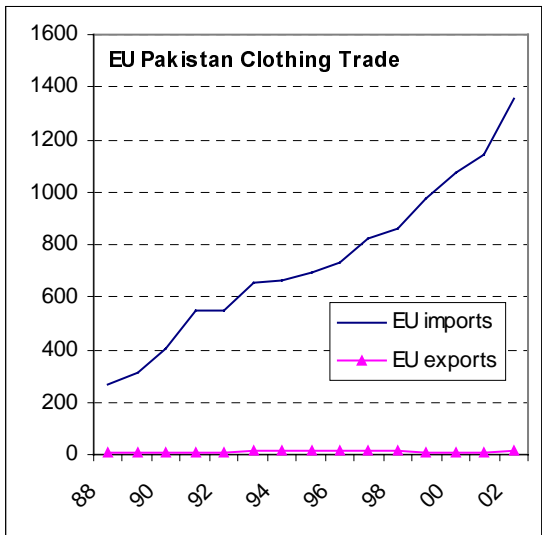
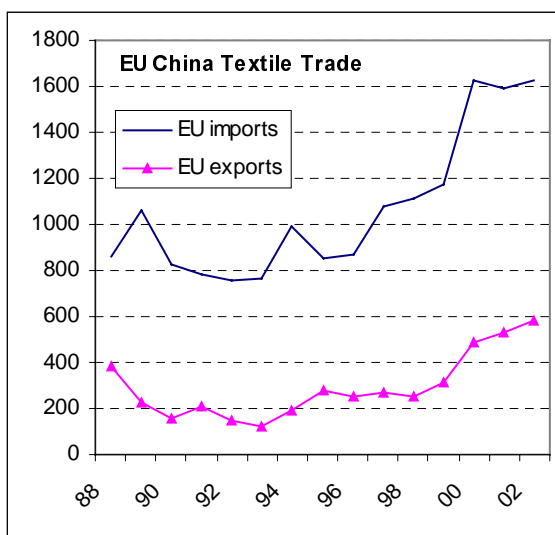
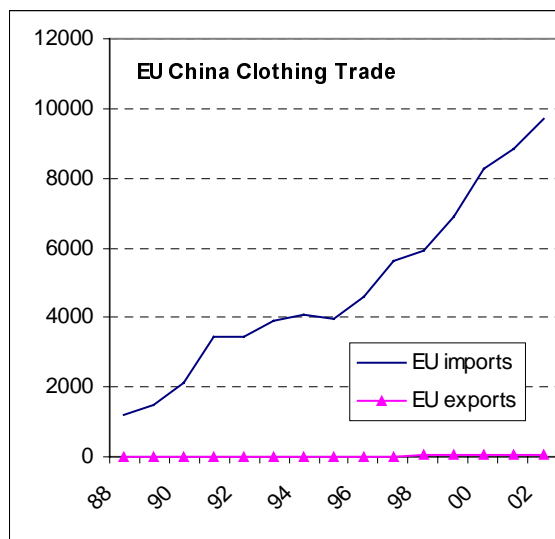
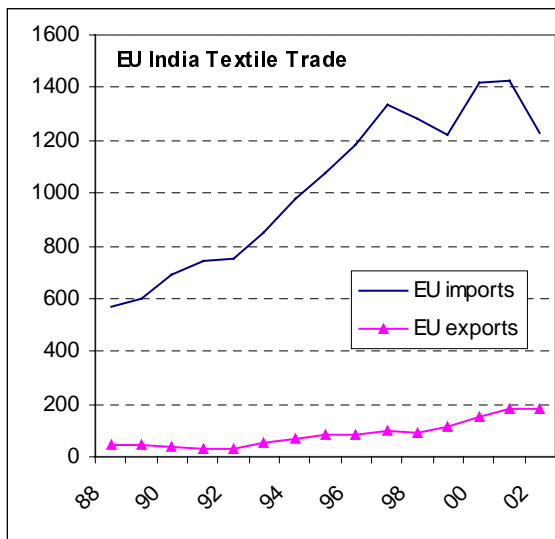
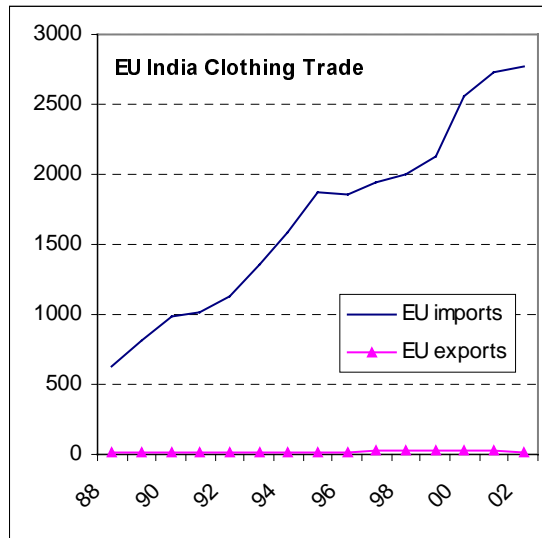
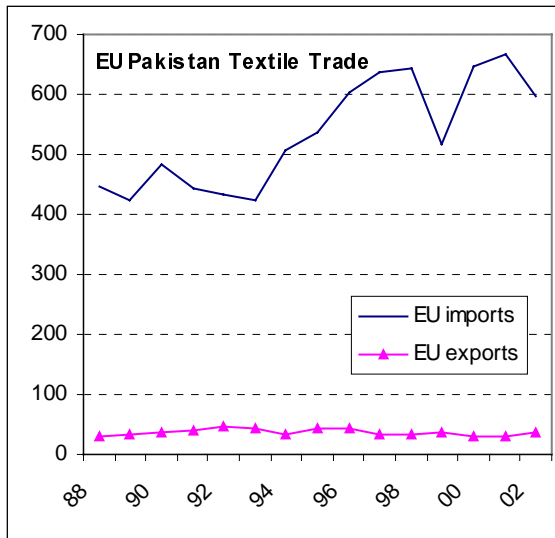


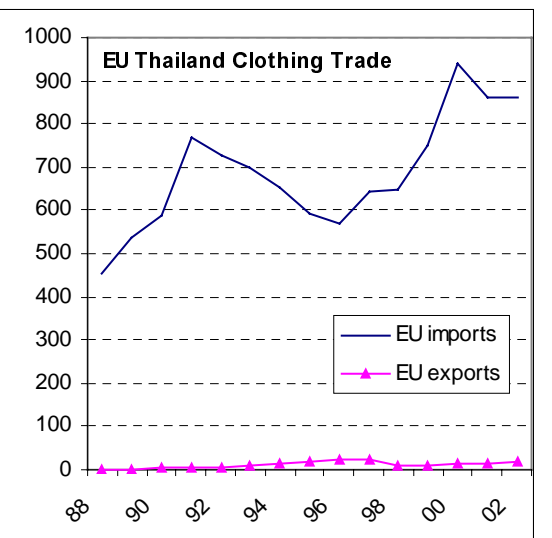
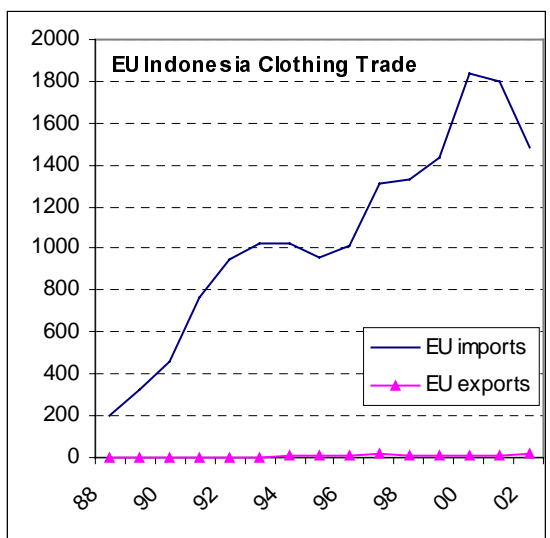
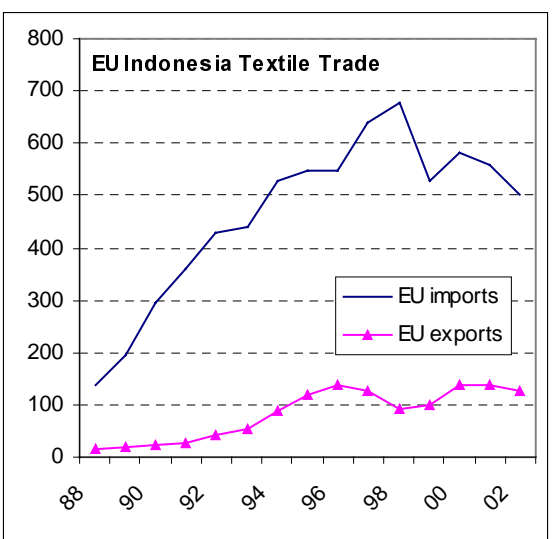
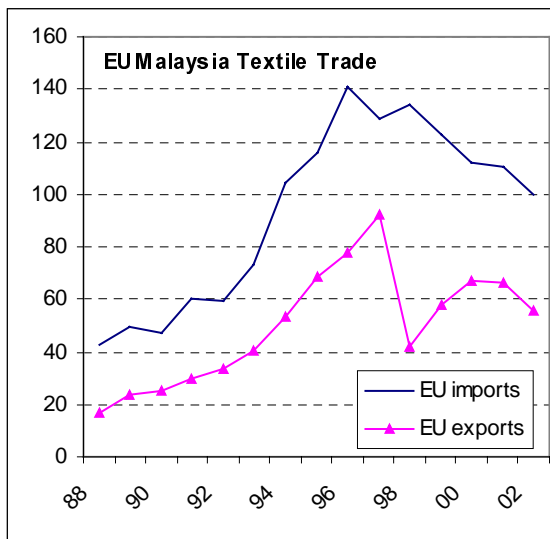
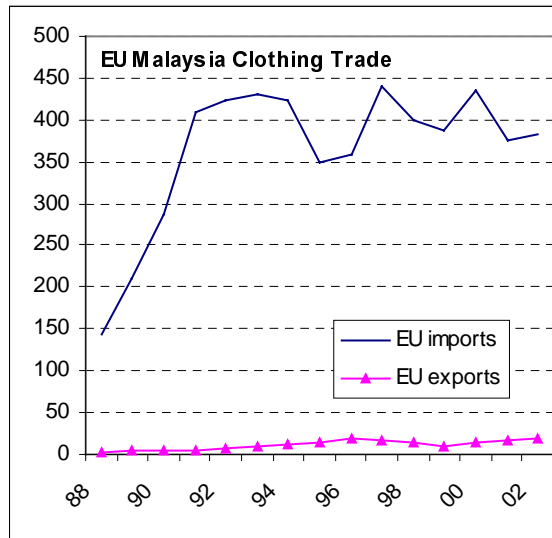
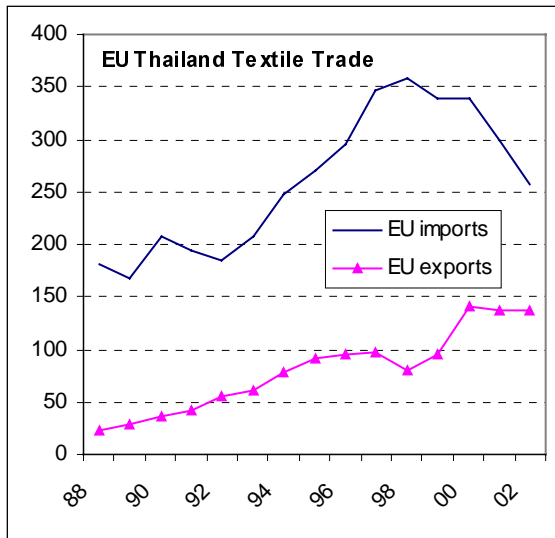


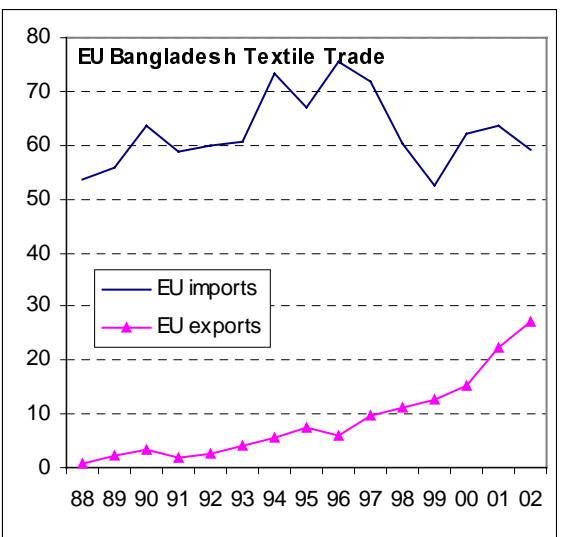
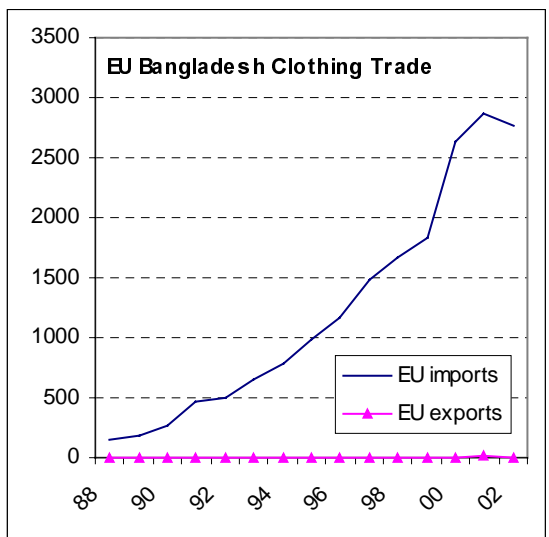
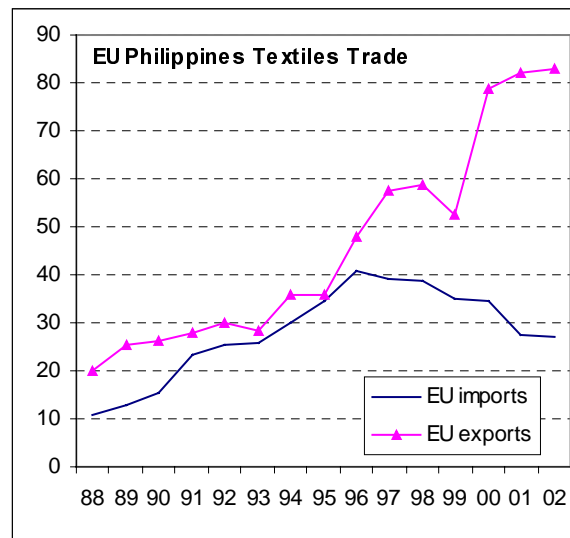
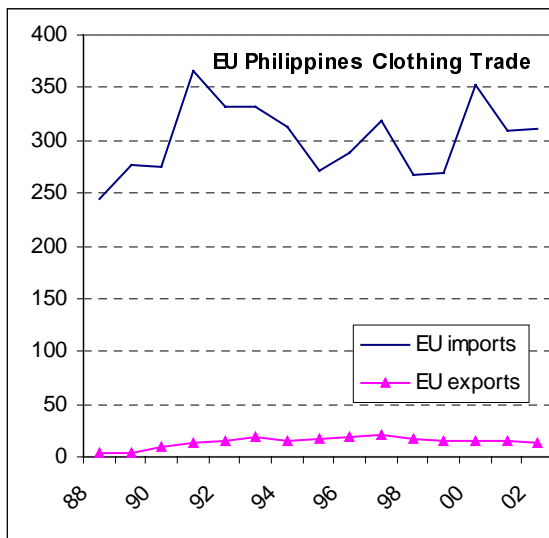
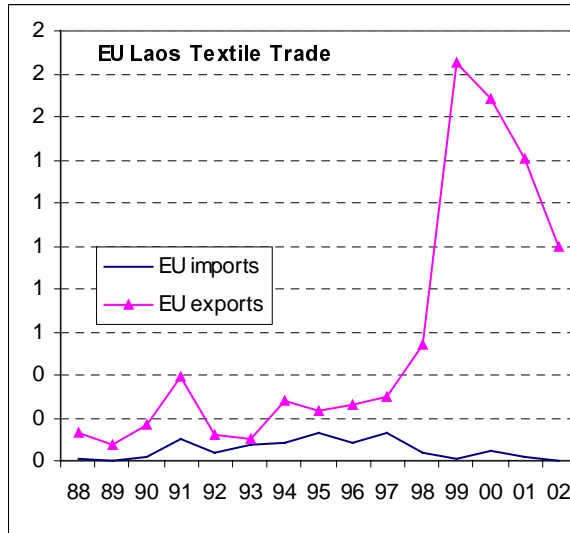
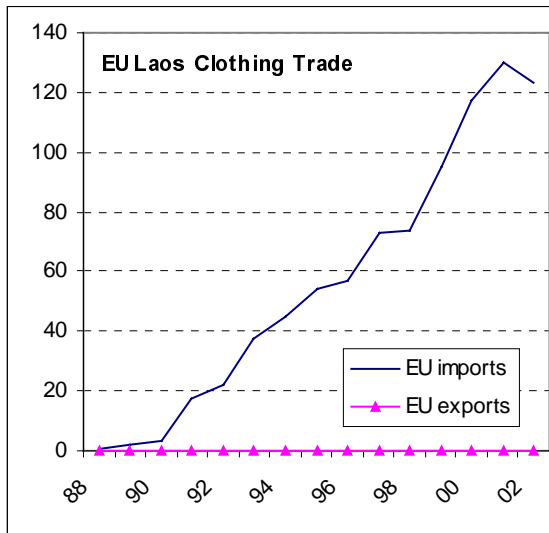


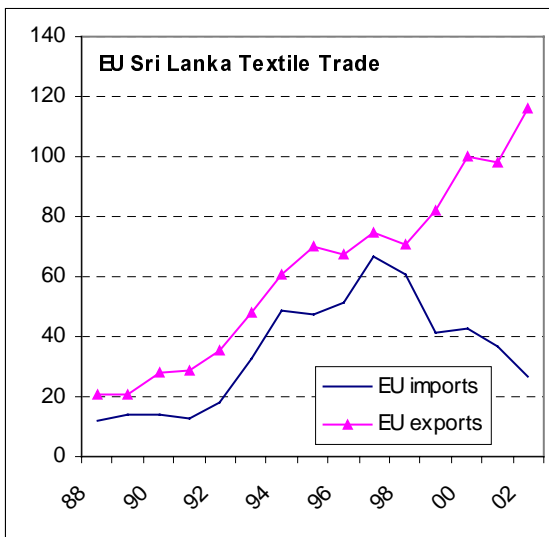
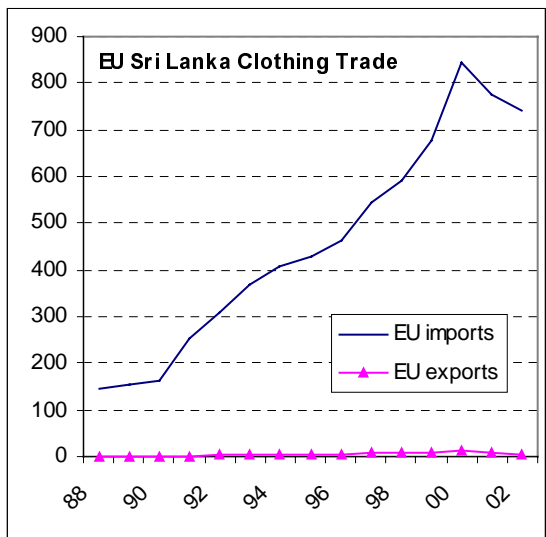
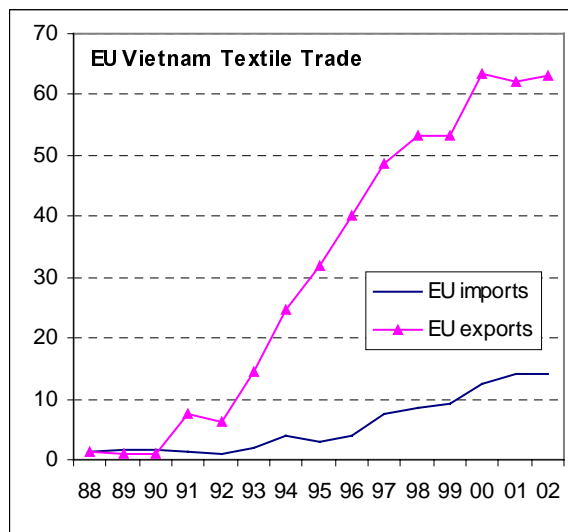
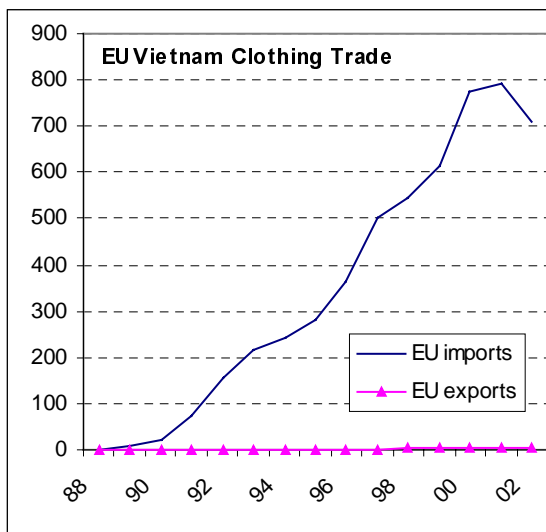
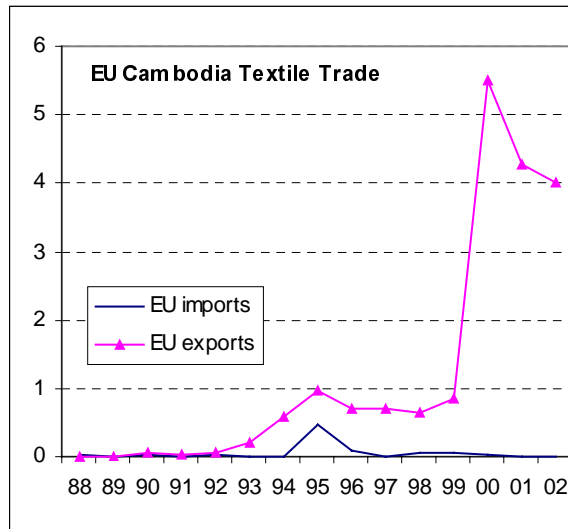
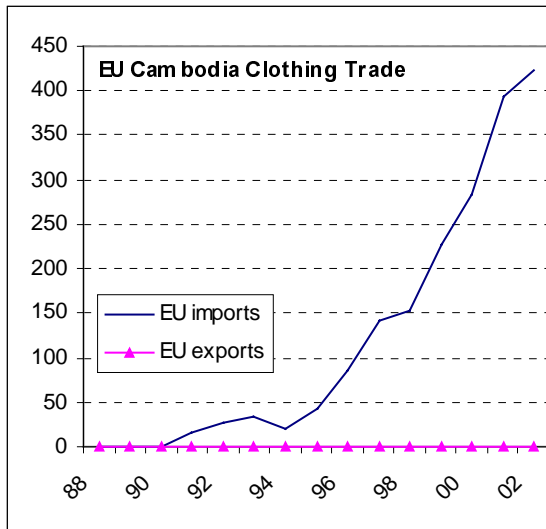


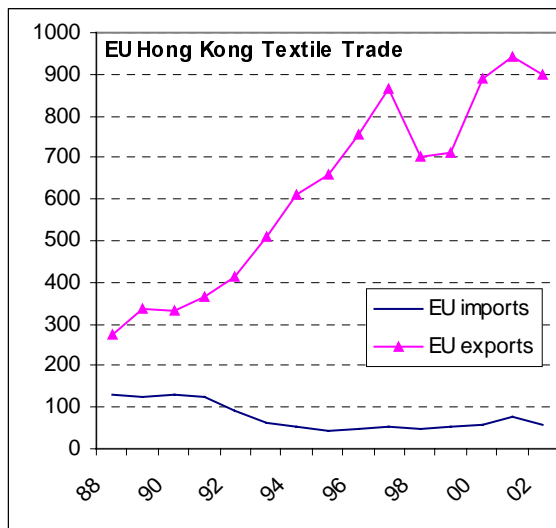
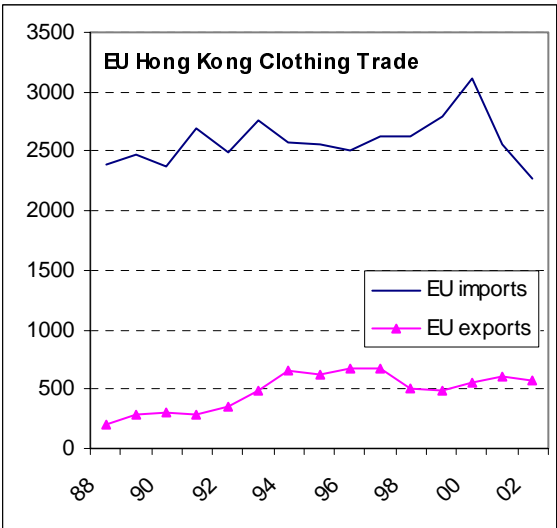
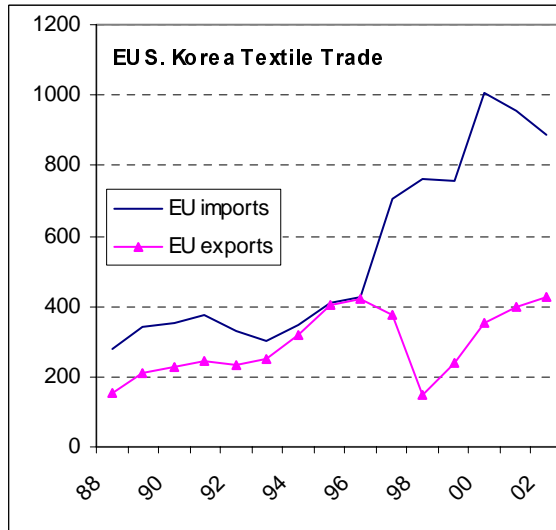
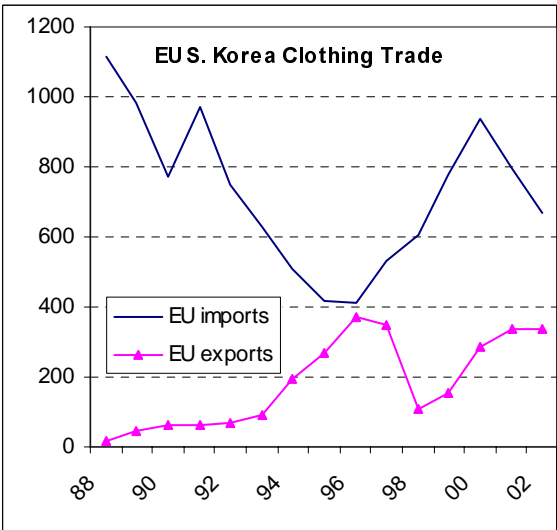
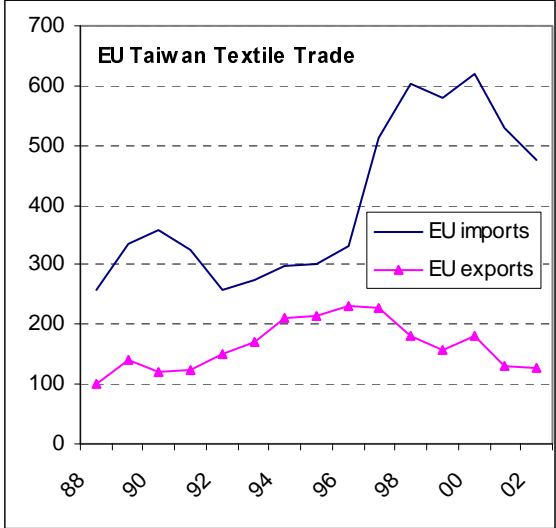
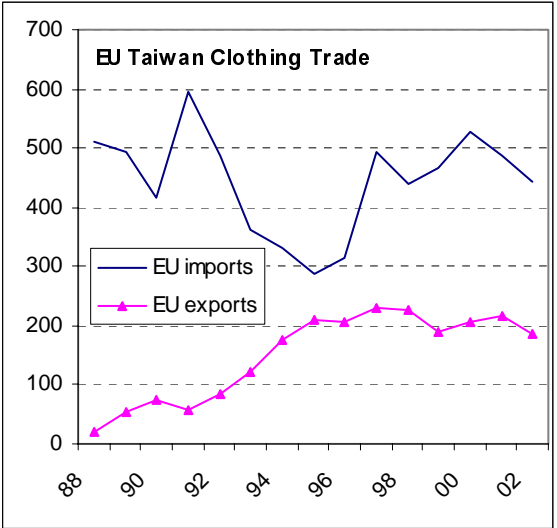


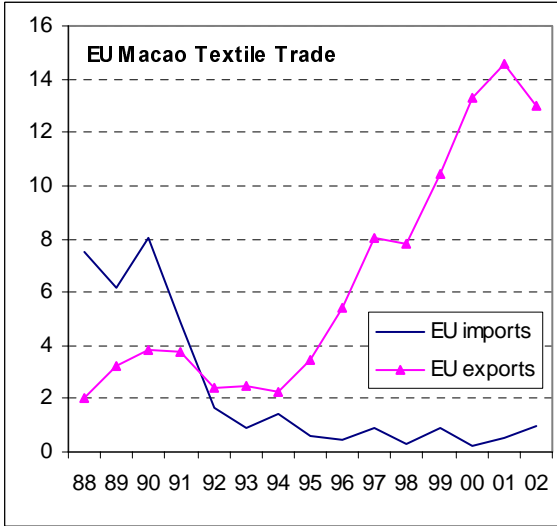
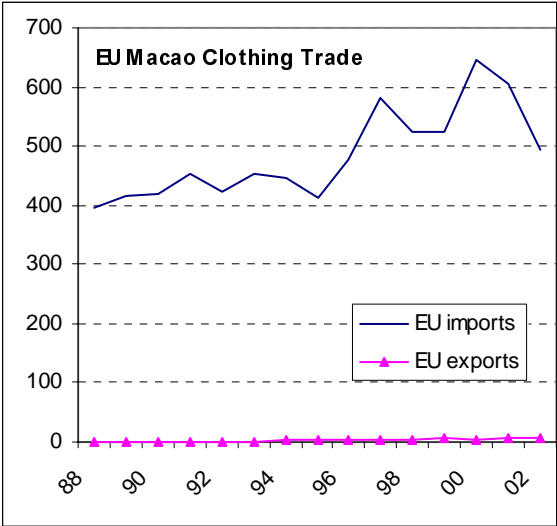












2. EVOLUTION OF TRADE IN TEXTILE AND CLOTHING TRADE WORLD-WIDE

2.4. Dependency by ratios

Ratios of countries' dependency on Textile and Clothing Exports

(Data ranked by Share of total T&C exports in % of total exports of industry)

	Dependency on T&C for exports		Dependency on T&C exports to the EU		Dependency on T&C exports to the US		Concentration on particular markets for T&C exports	
	Share of T&C exports in % of total exports of industry - WORLD	Share of T&C exports in % of total exports of goods - WORLD	Share of T&C exports in % of total exports of industry - EU	Share of T&C exports in % of total exports of goods - EU	Share of T&C exports in % of total exports of industry - USA	Share of T&C exports in % of total exports of goods - USA	Share of T&C exports to the EU in % of T&C exports to the World	Share of T&C exports to the US in % of T&C exports to the World
Algeria*	0,0	0,0	0,0	0,0	0,0	0,0	40,2	0,0
Egypt	19,5	17,4	25,8	23,8	70,8	69,5	42,9	33,1
Israel*	4,2	4,1	6,0	5,5	5,5	5,5	36,8	50,6
Jordan	19,6	16,7	10,6	10,2	91,0	90,6	2,2	65,9
Lebanon	10,6	8,7	21,2	17,7	18,0	8,1	39,3	6,4
Morocco*	43,4	33,7	52,8	42,6	42,6	32,8	94,4	3,3
Tunisia	46,1	42,3	53,9	50,7	25,6	22,1	95,8	0,5
Turkey	38,1	33,2	46,7	41,7	50,0	45,7	64,7	13,7
Czech	5,9	5,7	6,4	6,2	3,3	3,2	75,2	1,7
Estonia	11,3	10,2	13,6	13,1	24,1	22,2	77,3	4,7
Hungary	5,9	5,4	6,1	5,7	4,0	3,9	79,0	3,6
Latvia	15,5	14,1	17,7	17,1	19,6	13,4	74,0	2,7
Lithuania	18,6	16,3	31,6	29,0	12,9	10,0	84,8	2,3
Poland	8,3	7,7	10,1	9,5	6,5	5,6	86,4	1,7
Slovakia	7,1	6,8	8,2	8,1	8,4	8,3	71,1	1,6
Slovenia	7,8	7,5	9,1	9,0	5,0	4,8	74,4	1,7
Romania	27,2	26,2	36,4	35,3	22,5	22,3	91,6	2,7
Bulgaria*	19,2	17,2	28,5	26,6	48,5	41,8	78,9	9,6
Croatia	13,4	12,0	21,0	20,2	0,9	0,9	92,0	0,2
Fyrom	36,7	30,6	50,3	45,6	82,2	70,7	72,6	19,9
Argentina	3,2	1,8	6,8	1,9	0,6	0,5	18,4	2,9
Brazil	3,1	2,2	2,7	1,4	2,1	1,9	16,5	21,1
Uruguay	22,4	12,3	33,2	16,1	10,9	6,6	24,5	4,6
Mexico	6,8	6,4	2,1	2,0	7,0	6,6	1,0	91,4
Cambodia		85,0	83,6	83,3				
Bangladesh		84,5	94,7	88,7				
Laos		24,0	92,8	87,2				
Vietnam			18,0	16,4		33,3		
Pakistan		65,0	73,0	67,0				
Myanmar			78,7	74,2				
China	19,9	18,7	11,7	11,2	8,6	8,4	9,2	9,2
Hong Kong	51,3	50,5	64,6	63,9	73,3	72,6	20,8	43,3
Macao	88,7	87,8	85,4	85,4	94,6	94,6	31,4	62,9
India*	30,2	26,0	37,1	32,8	34,0	31,0	29,5	24,9
Indonesia	15,0	13,6	27,1	24,0	29,3	26,8	24,3	27,1
Malaysia	2,8	2,6	3,3	3,1	4,3	4,3	16,2	33,0
Maldives	99,4	42,3	100,0	10,7	100,0	98,6	4,3	94,9
Sri Lanka	71,1	55,6	69,0	60,5	84,0	82,5	29,5	62,2
Thailand	9,7	8,1	10,3	9,1	18,1	15,4	18,0	38,6
Mongolia*	43,6	41,3	98,0	89,0	98,8	98,8	16,2	47,7
Nepal*	61,1	54,9	94,4	94,1	97,4	97,3	38,8	48,0
Philippines	8,6	8,1	4,7	4,4	22,1	21,0	10,6	72,8
Russia	0,6	0,6	0,7	0,7	2,7	2,7	40,7	13,7
Mauritius	84,4	63,0	85,3	56,6	94,8	89,8	60,0	28,3
South Africa	2,5	2,3	3,4	2,9	9,0	8,4	32,8	27,7
South Korea	10,6	10,4	7,3	7,2	9,8	9,7	9,2	19,5

Note: Textile Negotiation Unit Estimates based on ComTrade, data are of 2001, except when there is * data is from 2000.

2.5. Structural data, selected countries

Share of Textile and Clothing in Total Manufacturing Employment

Country	1985	1990	1995	1999	2000
Clothing (average)	5.90%	5.38%	4.57%	4.00%	
Austria	5.20%	4.27%	3.05%	2.28%	2.12%
Belgium	5.40%	4.89%	2.62%	1.89%	1.73%
Denmark	3.96%	2.69%	1.85%	1.21%	1.18%
Finland	6.58%	4.29%	2.44%	2.11%	1.96%
France	5.31%	4.48%	3.80%	3.04%	
Germany	2.73%	2.23%	1.60%	1.17%	1.05%
Italy	9.02%	8.66%	7.74%	6.67%	6.53%
Portugal	14.58%	15.90%	16.73%	16.46%	
Spain	6.26%	6.72%	5.82%	5.71%	
Norway	1.50%	0.85%	0.93%	0.62%	
Canada	6.35%	5.63%	4.79%		
United	4.87%	4.50%	4.01%	2.87%	2.60%
Japan	5.00%	4.78%	4.08%		
Textiles (average)	6.0%	5.3%	4.8%	4.4%	
Austria	5.4%	4.8%	3.9%	3.5%	3.3%
Belgium	7.7%	7.0%	7.3%	7.0%	6.8%
Denmark	3.3%	2.8%	2.5%	2.0%	1.9%
Finland	3.1%	2.5%	1.9%	1.8%	1.7%
France	4.6%	3.8%	3.3%	3.0%	
Germany	3.6%	3.0%	2.1%	1.8%	1.8%
Italy	7.8%	7.9%	8.2%	7.9%	8.0%
Portugal	17.5%	15.3%	12.8%	11.5%	
Spain	6.3%	5.1%	4.6%	4.5%	
Norway	2.7%	2.3%	2.0%	1.9%	
Canada	3.3%	3.0%	2.8%		
United	4.6%	4.6%	4.6%	3.9%	3.8%
Japan	8.1%	7.2%	6.1%		

Source: OECD, 2003 from STAN, ISIC, Rev.3, classification 17 for textiles and 18 for clothing

Importance of Textile and Clothing in Selected Economies

	Employment			Exports			Value added		
	1985	1995	1998	1985	1995	2000	1985	1995	1998
MENA									
Egypt	29.2	28.9	29.2	4	20.1	23.1	17.3	10.7	12.9
Iran	21.8	..	..	1.4	4.25	2.40	19.2	11.1	..
Israel	14.9	15.0	..	6.5	6.4	4.6	7.1	7.9	4.4
Jordan	7.5	10.4	..	0.4	4.7	11.6	4.1	5.5	..
Kuwait	13.8	19.5	18.8	.07	0.06	0.11	6.6	4.4	..
Malta	34.2	16.3	..	32.8	10.7	7.9	27.4	11	3.2
Morocco	27.1	38.0	39.4	15.7	35	34.8	18.6	17	16.2
Tunisia	27.1	41.0	41.4	26.8	50.7	49.6	15.2	22.6	22.5
Comparators									
Bangladesh	64.6	..	..	24.6	31.7	84.54	27.5	33.7	...
China	..	..	..	26.2	22.8	17.75			
Hong Kong	43.9	37.5	30.0	33.1	28.4	25.37	38.9	26.3	23.0
Hungary	13.4	14.4	14.8	9.7	11.2	2.21	9	6.3	5.9
India	22.8	21.0	20.4	21.5	29.6	27.76	15	10.5	11.4
Indonesia	21.8	23.9	..	2.39	13.00	11.96	14.5	15.4	..
Poland	15.4	14.4	14.3	6.38	14.10	9.99	13.4	6.3	6.2
Portugal	29.0	27.7	...	30.9	24	17.28	2.7	14.9	..
Turkey	24.0	31.4	34.2	27.3	41.9	42.78	11.7	16.4	16.9

Source: Estimations based on UNIDO and COMTRADE data.

Note: Employment and value added estimates are expressed as a share of the respective aggregates for manufacturing sector. For exports, the estimate is the share of all merchandise trade.

Employment ic T&C in PanEuroMed Region

	T&C Employment (thousand)	share in total Employment
EU	2200	1
Egypt	1000	7
Israel	38	2
Morocco	190	6
Syria	530	16
Tunisia	240	11
Turkey	1930	9
Jordan	30	''
Lebanon	9	''
Malta	3,84	3
Cyprus	3,5	5
Hungary	138	4
Poland	387	3
Czech	112	2
Slovakia	51	2
Estonia	23	4
Latvia	''	''
Lithuania	58	4
Slovenia	31	3
Romania	430	4
Bulgaria	135	5
Switzerland	26	0,7
Norway	8	0,4

Source: CEPII

2.6. Applied and bound tariffs

Applied Tariffs in Textiles and Clothing

Country (HS numbers)	Raw agricultural products (HS 50.04-07)		Vegetable fibres (HS 51-53)		Man made filaments yarn (HS 54-55)		Products made of fabric (HS 56-60)		Clothing (HS 61-63)	
	Average	Maximum	Average	Maximum	Average	Maximum	Average	Maximum	Average	Maximum
Venezuela	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Tunisia	0,00	0,00	0,00	0,00	0,27	25,50	0,00	0,00	0,00	0,00
Iceland	0,00	0,00	0,00	0,00	0,00	0,00	2,01	10,00	13,42	15,00
Korea	3,50	8,00	6,91	8,00	7,93	8,00	8,00	8,00	8,00	8,00
European Union	0,80	2,50	6,43	14,30	8,83	10,10	8,62	21,10	12,35	13,40
Japan	1,56	6,25	5,81	16,00	7,82	10,85	6,97	17,90	11,28	14,50
Turkey	3,75	6,00	8,09	17,00	10,33	11,00	11,05	15,00	13,81	14,80
Czech Republic	1,58	2,90	5,43	11,50	6,17	18,80	7,79	14,40	9,92	33,60
Slovakia	1,58	2,90	5,43	11,50	6,17	18,80	7,79	14,40	9,92	33,60
Hungary	5,08	8,90	11,26	15,00	9,26	15,00	11,68	20,00	10,79	20,00
Norway	0,45	0,60	8,82	18,40	11,12	21,00	9,58	21,00	16,75	22,70
United States	1,13	4,50	7,94	20,45	13,05	18,85	9,23	22,40	12,84	29,66
Canada	0,00	0,00	10,50	19,00	14,33	19,00	15,52	23,60	22,36	24,50
Switzerland	0,00	0,00	3,92	28,80	6,10	27,10	5,29	28,26	9,06	52,72
Brazil	4,00	4,00	14,48	18,00	16,44	18,00	17,68	20,00	19,93	30,00
Argentina	4,00	4,00	14,66	18,00	16,65	21,00	17,56	20,00	21,06	28,00
Malaysia	0,00	0,00	10,45	30,00	13,53	20,00	17,22	30,00	21,07	30,00
Colombia	7,50	10,00	16,36	20,00	17,40	25,00	17,73	20,00	20,00	20,00
Poland	6,70	11,70	13,07	20,00	10,88	17,70	17,03	28,30	26,64	30,00
Mexico	10,00	10,00	13,76	15,00	14,11	15,00	16,98	20,00	33,91	35,00
Australia	0,00	0,00	11,84	24,00	15,70	25,00	12,16	37,00	29,60	37,00
Indonesia	5,00	5,00	15,48	27,50	17,60	25,00	19,66	30,00	27,73	30,00
Romania	5,00	5,00	16,08	25,00	20,59	25,00	25,00	40,00	30,00	30,00
New Zealand	0,00	0,00	1,06	21,00	3,21	14,00	10,46	26,25	34,26	219,35
Thailand	7,50	10,00	20,55	42,50	25,66	30,00	33,46	45,00	43,50	100,00
India	1,25	5,00	91,82	160,00	97,68	175,00	97,29	100,00	99,72	100,00

Source: OECD Tariffs and Trade, 2002.

Note: Applied tariff rates in 1996; only tariffs with ad valorem equivalents are included.

Bound Tariffs in Textiles and Clothing, Post-Uruguay Round

Country (HS numbers)	Raw agricultural products (HS 50.04-07)		Vegetable fibres (HS 51-53)		Man made filaments yarn (HS 54-55)		Products made of fabric (HS 56-60)		Clothing (HS 61-63)	
	Average	Maximum	Average	Maximum	Average	Maximum	Average	Maximum	Average	Maximum
European Union	0.00	0.00	5.10	8.00	6.29	8.00	6.84	12.00	11.35	12.00
Japan	0.00	0.00	4.24	12.53	6.27	8.10	5.60	14.20	8.59	13.40
Switzerland	0.00	0.00	2.91	10.80	4.57	15.10	3.84	15.70	6.21	20.00
Norway	0.53	0.70	6.12	12.00	7.35	13.10	6.69	13.10	10.93	13.70
Czech Republic	0.38	0.70	4.96	10.80	5.64	17.00	7.18	13.50	9.35	31.50
Slovakia	0.38	0.70	4.96	10.80	5.64	17.00	7.18	13.50	9.35	31.50
Iceland	0.00	0.00	1.18	11.50	3.31	6.50	12.30	28.00	20.20	25.00
Canada	0.00	0.00	8.13	14.00	10.89	14.00	11.82	18.00	17.28	18.00
United States	0.61	2.43	5.98	15.22	10.01	17.78	5.50	18.80	9.86	26.40
Hungary	3.75	6.00	5.89	10.00	6.11	17.41	7.86	13.00	10.91	44.00
Poland	2.50	5.00	10.33	38.00	8.55	12.00	12.47	26.30	18.00	18.00
Malaysia	5.00	5.00	13.23	30.00	18.02	30.00	20.88	39.67	22.95	40.00
Philippines	10.00	10.00	21.91	30.00	24.57	30.00	31.28	50.00	30.00	30.00
Korea	27.53	51.00	12.08	30.00	13.24	30.00	20.72	30.00	27.36	35.00
Australia	0.45	0.94	12.68	42.75	16.80	40.31	12.30	32.90	35.96	89.30
Argentina	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00
Mexico	20.00	20.00	34.54	50.00	35.00	35.00	34.90	40.00	35.10	50.00
Brazil	35.00	35.00	35.34	55.00	35.00	35.00	34.70	35.00	35.00	35.00
Venezuela	40.00	40.00	35.46	40.00	35.00	35.00	30.98	35.00	34.98	35.00
Indonesia	40.00	40.00	39.94	40.00	40.00	40.00	40.00	40.00	40.00	40.00
New Zealand	0.00	0.00	3.19	30.00	6.48	20.00	18.28	42.50	39.60	313.50
Colombia	70.00	70.00	38.91	99.00	34.61	35.00	35.00	35.00	40.00	40.00
Romania	18.50	60.00	39.90	270.00	34.89	35.00	28.20	35.00	21.15	35.00
Tunisia	62.00	62.00	60.21	62.00	49.85	60.00	49.85	60.00	59.71	60.00
Thailand	63.25	226.00	23.89	30.00	30.00	30.00	30.07	35.00	30.48	100.00
Turkey	18.48	19.50	51.36	150.00	88.34	150.00	62.57	200.00	96.45	100.00
India	100.00	100.00	89.17	160.00	75.20	100.00	77.44	100.00	99.72	100.00

Source: OECD Tariffs and Trade, 2002.

Note: Post Uruguay Round bound tariff rates; only tariffs with ad valorem equivalents are included.

2.7. Textiles and clothing trade figures – WTO

countries

Textile Exports of WTO Members, 1994 – 2000

	Value (million US dollars)							Market share		Growth in
	1994	1995	1996	1997	1998	1999	2000	1994	2000	% 94-00
Total WTO members	104.383	120.024	121.815	127.728	119.567	119.403	130.453	100,0	100,0	25,0
European Union (15)	18.168	21.831	22.544	23.006	23.068	21.820	22.299	17,4	17,1	22,7
China	11.818	13.918	12.112	13.828	12.817	13.043	16.135	11,3	12,4	36,5
Hong Kong, China	12.574	13.815	14.146	14.602	13.040	12.271	13.442	12,0	10,3	6,9
Korea, Rep. of	10.693	12.313	12.718	13.337	11.279	11.618	12.710	10,2	9,7	18,9
Taipei, Chinese	10.260	11.882	12.048	12.772	11.159	10.906	11.896	9,8	9,1	15,9
United States	6.592	7.372	8.009	9.193	9.216	9.510	10.961	6,3	8,4	66,3
Japan	6.780	7.178	6.927	6.750	5.971	6.598	7.023	6,5	5,4	3,6
India	3.829	4.358	4.936	5.243	4.558	5.086	5.899	3,7	4,5	54,1
Pakistan	3.985	4.256	4.919	4.608	4.302	4.258	4.532	3,8	3,5	13,7
Turkey	2.194	2.527	2.722	3.350	3.549	3.478	3.672	2,1	2,8	67,4
Indonesia	2.498	2.713	2.835	2.255	2.359	3.019	3.505	2,4	2,7	40,3
Mexico	937	1.283	1.548	1.910	2.030	2.303	2.571	0,9	2,0	174,4
Canada	1.171	1.377	1.663	1.854	1.919	2.032	2.205	1,1	1,7	88,3
Thailand	1.647	1.937	1.891	2.020	1.760	1.818	1.960	1,6	1,5	19,0
Switzerland	2.112	2.267	2.010	1.795	1.811	1.641	1.533	2,0	1,2	-27,4
Malaysia a	831	1.129	1.302	1.292	1.094	1.120	1.270	0,8	1,0	52,8
Czech Rep.	978	1.342	976	983	1.136	1.072	1.218	0,9	0,9	24,5
RoWTO	7.316	8.526	8.509	8.930	8.499	7.810	7.622	7,0	5,8	4,2

Source: WTO(2002) G/C/W/366 - and other sources

Clothing Exports of WTO Members, 1994 – 2000

	Value (million US dollars)							Market share		Growth in
	1994	1995	1996	1997	1998	1999	2000	1994	2000	% 94-00
Total WTO members	112.839	122.564	126.849	139.132	141.624	141.398	159.050	100,0	100,0	41,0
China	23.731	24.049	25.034	31.803	30.048	30.078	36.071	21,0	22,7	52,0
Hong Kong, China	21.404	21.297	21.976	23.107	22.164	22.371	24.214	19,0	15,2	13,1
<i>domestic exports</i>	9.457	9.540	8.979	9.329	9.667	9.571	9.935	8,4	6,2	5,1
<i>re-exports</i>	11.947	11.757	12.997	13.778	12.497	12.800	14.280	10,6	9,0	19,5
European Union (15)	12.370	14.580	15.890	15.761	15.817	14.829	14.974	11,0	9,4	21,1
Mexico	1.700	2.731	3.753	5.637	6.603	7.772	8.631	1,5	5,4	407,7
United States	5.616	6.651	7.511	8.672	8.793	8.269	8.629	5,0	5,4	53,7
Turkey	4.582	6.119	6.067	6.697	7.058	6.516	6.533	4,1	4,1	42,6
India	3.701	4.110	4.217	4.343	4.782	5.153	6.030	3,3	3,8	62,9
Korea, Rep. of	5.653	4.957	4.221	4.192	4.651	4.871	5.027	5,0	3,2	-11,1
Indonesia	3.206	3.376	3.591	2.904	2.630	3.857	4.734	2,8	3,0	47,7
Bangladesh	1.479	1.969	2.218	2.688	3.786	3.721	4.244	1,3	2,7	187,0
Thailand	4.508	5.008	3.729	3.686	3.540	3.453	3.757	4,0	2,4	-16,7
Sri Lanka	1.474	...	...	...	...	2.287	2.812	1,3	1,8	90,8
Philippines	897	2.420	2.389	2.319	2.324	2.111	2.536	0,8	1,6	182,7
Morocco	739	797	1.131	1.086	2.542	2.496	2.401	0,7	1,5	224,9
Romania	995	1.360	1.559	1.753	1.979	2.044	2.328	0,9	1,5	134,0
Malaysia	2.071	2.266	2.376	2.337	2.302	2.253	2.257	1,8	1,4	9,0
Tunisia	1.840	2.322	2.396	2.299	2.474	2.375	2.227	1,6	1,4	21,0
Pakistan	1.578	1.611	1.872	1.810	1.840	1.846	2.144	1,4	1,3	35,9
Canada	825	1.016	1.241	1.492	1.706	1.881	2.077	0,7	1,3	151,8
Poland	1.847	2.304	2.373	2.223	2.387	2.201	1.917	1,6	1,2	3,8
Macau, China	1.204	1.377	1.547	1.805	1.642	1.630	1.849	1,1	1,2	53,6
Singapore	1.526	1.464	1.398	1.491	1.427	1.603	1.825	1,4	1,1	19,6
<i>domestic exports</i>	677	587	495	440	430	471	510	0,6	0,3	-24,7
<i>re-exports</i>	849	877	903	1.051	997	1.132	1.321	0,8	0,8	55,6
Hungary	991	1.032	1.135	1.119	1.277	1.311	1.221	0,9	0,8	23,2
Mauritius	731	808	919	892	970	920	948	0,6	0,6	29,7
RoWTO	8.171	8.940	8.306	9.016	8.882	9.271	9.657	7,2	6,1	18,2

Source: WTO(2002) G/C/W/366 - and other sources

Textile and Clothing Exports of WTO Members, 1994 – 2000

	Value (million US dollars)							Market share		Growth in
	1994	1995	1996	1997	1998	1999	2000	1994	2000	% 94-00
Total WTO members	217.222	242.588	248.664	266.860	261.191	260.801	289.503	100,0	100,0	33,3
China	35.549	37.967	37.146	45.631	42.865	43.121	52.206	34,1	40,0	46,9
Hong Kong, China	33.978	35.112	36.122	37.709	35.204	34.642	37.656	32,6	28,9	10,8
domestic exports	11.403	11.354	10.749	10.963	11.057	10.794	11.111	10,9	8,5	-2,6
re-exports	22.576	23.758	25.373	26.746	24.147	23.848	26.546	21,6	20,3	17,6
European Union (15)	30.538	36.411	38.434	38.767	38.885	36.649	37.273	29,3	28,6	22,1
United States	12.208	14.023	15.520	17.865	18.009	17.779	19.590	11,7	15,0	60,5
Korea, Rep. of	16.346	17.270	16.939	17.529	15.930	16.489	17.737	15,7	13,6	8,5
Taipei, Chinese	13.705	15.133	15.255	16.181	14.348	13.768	14.918	13,1	11,4	8,9
India	7.530	8.468	9.153	9.586	9.340	10.239	11.929	7,2	9,1	58,4
Mexico	2.637	4.014	5.301	7.547	8.633	10.075	11.202	2,5	8,6	324,8
Turkey	6.776	8.646	8.789	10.047	10.607	9.994	10.205	6,5	7,8	50,6
Indonesia	5.704	6.089	6.426	5.159	4.989	6.876	8.239	5,5	6,3	44,4
Japan	7.362	7.708	7.425	7.222	6.379	7.054	7.557	7,1	5,8	2,6
Pakistan	5.563	5.867	6.791	6.418	6.142	6.104	6.676	5,3	5,1	20,0
Thailand	6.155	6.945	5.620	5.706	5.300	5.271	5.717	5,9	4,4	-7,1
Canada	1.996	2.393	2.904	3.346	3.625	3.913	4.282	1,9	3,3	114,5
Bangladesh	1.816	2.401	2.663	3.153	4.219	3.721	4.244	1,7	3,3	133,7
Malaysia	2.902	3.395	3.678	3.629	3.396	3.373	3.527	2,8	2,7	21,5
Sri Lanka	1.607	...	...	...	...	2.493	3.024	1,5	2,3	88,2
Philippines	1.070	2.700	2.701	2.656	2.611	2.387	2.833	1,0	2,2	164,8
Singapore	2.942	2.960	2.745	2.733	2.287	2.456	2.732	2,8	2,1	-7,1
Poland	2.244	2.816	2.935	2.885	3.140	2.928	2.686	2,1	2,1	19,7
Morocco	891	974	1.360	1.289	2.670	2.629	2.524	0,9	1,9	183,3
Romania	1.129	1.538	1.726	1.941	2.170	2.209	2.524	1,1	1,9	123,6
Tunisia	1.994	2.487	2.547	2.426	2.600	2.504	2.381	1,9	1,8	19,4
RoWTO	14.579	17.271	16.484	17.435	17.842	14.127	17.840	14,0	13,7	22,4

Source: WTO(2002) G/C/W/366 - and other sources

Textile and Clothing Exports of WTO Members, 1994 – 2000

	Value (million US dollars)							Market share		Growth in
	1994	1995	1996	1997	1998	1999	2000	1994	2000	% 94-00
Total WTO members	217.222	242.588	248.664	266.860	261.191	260.801	289.503	100,0	100,0	33,3
China	35.549	37.967	37.146	45.631	42.865	43.121	52.206	34,1	40,0	46,9
Hong Kong, China	33.978	35.112	36.122	37.709	35.204	34.642	37.656	32,6	28,9	10,8
domestic exports	11.403	11.354	10.749	10.963	11.057	10.794	11.111	10,9	8,5	-2,6
re-exports	22.576	23.758	25.373	26.746	24.147	23.848	26.546	21,6	20,3	17,6
European Union (15)	30.538	36.411	38.434	38.767	38.885	36.649	37.273	29,3	28,6	22,1
United States	12.208	14.023	15.520	17.865	18.009	17.779	19.590	11,7	15,0	60,5
Korea, Rep. of	16.346	17.270	16.939	17.529	15.930	16.489	17.737	15,7	13,6	8,5
Taipei, Chinese	13.705	15.133	15.255	16.181	14.348	13.768	14.918	13,1	11,4	8,9
India	7.530	8.468	9.153	9.586	9.340	10.239	11.929	7,2	9,1	58,4
Mexico	2.637	4.014	5.301	7.547	8.633	10.075	11.202	2,5	8,6	324,8
Turkey	6.776	8.646	8.789	10.047	10.607	9.994	10.205	6,5	7,8	50,6
Indonesia	5.704	6.089	6.426	5.159	4.989	6.876	8.239	5,5	6,3	44,4
Japan	7.362	7.708	7.425	7.222	6.379	7.054	7.557	7,1	5,8	2,6
Pakistan	5.563	5.867	6.791	6.418	6.142	6.104	6.676	5,3	5,1	20,0
Thailand	6.155	6.945	5.620	5.706	5.300	5.271	5.717	5,9	4,4	-7,1
Canada	1.996	2.393	2.904	3.346	3.625	3.913	4.282	1,9	3,3	114,5
Bangladesh	1.816	2.401	2.663	3.153	4.219	3.721	4.244	1,7	3,3	133,7
Malaysia	2.902	3.395	3.678	3.629	3.396	3.373	3.527	2,8	2,7	21,5
Sri Lanka	1.607	...	...	...	...	2.493	3.024	1,5	2,3	88,2
Philippines	1.070	2.700	2.701	2.656	2.611	2.387	2.833	1,0	2,2	164,8
Singapore	2.942	2.960	2.745	2.733	2.287	2.456	2.732	2,8	2,1	-7,1
Poland	2.244	2.816	2.935	2.885	3.140	2.928	2.686	2,1	2,1	19,7
Morocco	891	974	1.360	1.289	2.670	2.629	2.524	0,9	1,9	183,3
Romania	1.129	1.538	1.726	1.941	2.170	2.209	2.524	1,1	1,9	123,6
Tunisia	1.994	2.487	2.547	2.426	2.600	2.504	2.381	1,9	1,8	19,4
RoWTO	14.579	17.271	16.484	17.435	17.842	14.127	17.840	14,0	13,7	22,4

Source: WTO(2002) G/C/W/366 - and other sources

3. SURVEY OF STUDIES ON IMPACT OF MFA PHASE-OUT

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4. IMPACT OF 3RD STAGE OF INTEGRATION IN EU IMPORTS

4.9. Categories 3rd stage of integration in EU imports

period	2001			2002			2001 to 2002		
	1000€	tons	av. unit price	1000€	tons	av. unit price	Growth in value	Growth tons	Av. unit price
all integrated									
Extra EU	14.518.193	1.578.499	9,2	14.670.981	1.752.066	8,4	1,1%	11,0%	-9,0%
China	3.163.411	234.300	13,5	4.381.177	498.193	8,8	38,5%	112,6%	-34,9%
India	1.285.665	219.270	5,9	1.172.282	204.465	5,7	-8,8%	-6,8%	-2,2%
Bangladesh	208.261	17.900	11,6	164.022	17.274	9,5	-21,2%	-3,5%	-18,4%
Hong Kong	413.873	22.494	18,4	182.349	11.096	16,4	-55,9%	-50,7%	-10,7%
Pakistan	238.328	44.380	5,4	257.374	48.640	5,3	8,0%	9,6%	-1,5%
South Korea	448.763	61.142	7,3	286.705	55.726	5,1	-36,1%	-8,9%	-29,9%
Thailand	250.524	26.272	9,5	208.088	24.583	8,5	-16,9%	-6,4%	-11,2%
Taiwan	209.596	74.813	2,8	154.135	32.514	4,7	-26,5%	-56,5%	69,2%
Sri Lanka	171.658	12.785	13,4	159.907	12.016	13,3	-6,8%	-6,0%	-0,9%
Vietnam	429.335	32.479	13,2	355.362	36.738	9,7	-17,2%	13,1%	-26,8%
Japan	129.994	6.889	18,9	105.262	5.293	19,9	-19,0%	-23,2%	5,4%
Turkey	1.325.393	201.550	6,6	1.461.354	197.083	7,4	10,3%	-2,2%	12,8%
Romania	600.667	36.488	16,5	640.189	37.802	16,9	6,6%	3,6%	2,9%
Poland	702.672	86.913	8,1	674.755	88.362	7,6	-4,0%	1,7%	-5,5%
Czech Rep.	412.284	67.062	6,1	427.383	68.840	6,2	3,7%	2,7%	1,0%
Hungary	286.218	40.741	7,0	259.047	39.333	6,6	-9,5%	-3,5%	-6,3%
Bulgaria	159.047	11.662	13,6	177.816	15.105	11,8	11,8%	29,5%	-13,7%
Tunisia	468.608	24.801	18,9	469.443	24.404	19,2	0,2%	-1,6%	1,8%
Morocco	404.636	20.845	19,4	419.125	20.229	20,7	3,6%	-3,0%	6,7%
USA	457.945	42.342	10,8	380.002	44.001	8,6	-17,0%	3,9%	-20,1%
Australia	11.166	1.215	9,2	10.508	1.359	7,7	-5,9%	11,8%	-15,8%

4.10. Categories integrated in the 3rd stage of ATC where China had quotas

EU imports of T&C categories integrated in the 3rd stage of ATC where China had quotas

Partners	in thousand euro					growth			in tons					growth		
	2001	2002	S1 2001	S1 2002	S1 2003	2001/02	S1 03/02	S1 03/01	2001	2002	S1 2001	S1 2002	S1 2003	2001/02	S1 03/02	S1 03/01
China	2.366.074	3.463.864	1.038.037	1.274.057	1.652.895	46,4	29,7	59,2	123.310	350.932	49.912	108.468	192.856	188,0	77,8	286,4
East Asia	4.082.685	4.549.882	1.804.587	1.799.250	2.031.205	11,4	12,9	12,6	331.807	496.934	133.272	180.299	256.881	49,8	42,5	92,8
East Asia - China	1.716.611	1.086.018	766.550	525.192	378.309	-36,7	-28,0	-50,6	208.497	146.002	83.359	71.831	64.025	-30,0	-10,9	-23,2
Bangladesh	182.751	137.146	81.864	61.707	49.849	-25,0	-19,2	-39,1	13.384	12.147	5.719	5.276	5.673	-9,2	7,5	-0,8
Pakistan	132.243	135.215	59.122	61.761	75.306	2,2	21,9	27,4	22.922	25.948	10.327	14.085	13.669	13,2	-3,0	32,4
India	547.547	494.455	269.297	251.918	241.235	-9,7	-4,2	-10,4	78.409	71.149	40.447	35.034	34.729	-9,3	-0,9	-14,1
Turkey	878.315	911.871	415.671	424.478	432.920	3,8	2,0	4,1	140.272	124.882	74.680	66.100	58.298	-11,0	-11,8	-21,9
Morocco	273.659	253.189	135.679	130.667	120.346	-7,5	-7,9	-11,3	13.498	11.651	6.535	5.899	5.650	-13,7	-4,2	-13,5
Tunisia	323.278	315.960	167.710	176.125	157.278	-2,3	-10,7	-6,2	16.627	16.004	8.651	9.121	6.756	-3,8	-25,9	-21,9
Candidate 10	951.628	927.491	495.812	469.936	462.272	-2,5	-1,6	-6,8	113.378	117.246	57.775	59.952	56.133	3,4	-6,4	-2,8
World	9.378.555	9.560.634	4.357.060	4.232.977	4.337.417	1,9	2,5	-0,5	906.839	1.045.396	428.806	458.373	523.249	15,3	14,2	22,0
world - china	7.012.482	6.096.771	3.319.023	2.958.920	2.684.521	-13,1	-9,3	-19,1	783.529	694.465	378.893	349.905	330.392	-11,4	-5,6	-12,8

S1: First semester

Average Unit price of EU imports of T&C categories integrated in the 3rd stage of ATC where China had quotas

Partners	in thousand euro per ton					growth in %		
	2001	2002	S1 2001	S1 2002	S1 2003	2001/02	S1 03/02	S1 03/01
China	19,2	9,9	20,8	11,7	8,6	-49,6	-27,0	-58,8
East Asia	12,3	9,2	13,5	10,0	7,9	-25,6	-20,8	-41,6
East Asia - China	8,2	7,4	9,2	7,3	5,9	-9,7	-19,2	-35,7
Bangladesh	13,7	11,3	14,3	11,7	8,8	-17,3	-24,9	-38,6
Pakistan	5,8	5,2	5,7	4,4	5,5	-9,7	25,6	-3,8
India	7,0	6,9	6,7	7,2	6,9	-0,5	-3,4	4,3
Turkey	6,3	7,3	5,6	6,4	7,4	16,6	15,6	33,4
Morocco	20,3	21,7	20,8	22,2	21,3	7,2	-3,8	2,6
Tunisia	19,4	19,7	19,4	19,3	23,3	1,5	20,6	20,1
Candidate 10	8,4	7,9	8,6	7,8	8,2	-5,8	5,1	-4,0
World	10,3	9,1	10,2	9,2	8,3	-11,6	-10,2	-18,4
world - china	8,9	8,8	8,8	8,5	8,1	-1,9	-3,9	-7,2

4.11. Average unit price of Categories integrated in the 3rd stage of ATC where China had quotas

EU imports of selected categories liberalised during the 3rd stage of ATC and where China had quotas

Cat 161	thousand euro					growth in %			thousand euro					growth in %		
	2001	2002	S1 2001	S1 2002	S1 2003	2001/2002	S1 03/02	S1 03/01	2001	2002	S1 2001	S1 2002	S1 2003	2001/2002	S1 03/02	S1 03/01
China	471.089	538.570	340.382	380.279	472.546	14,3	24,3	38,8	16.372	75.063	9.590	37.582	67.529	358,5	79,7	604,1
East Asia	504.347	570.251	364.606	403.584	492.030	13,1	21,9	34,9	17.261	76.569	10.190	38.800	68.234	343,6	75,9	569,6
East Asia - China	33.258	31.681	24.224	23.304	19.484	-4,7	-16,4	-19,6	889	1.506	599	1.219	704	69,5	-42,2	17,5
Bangladesh	4.831	3.559	4.080	2.591	1.760	-26,3	-32,1	-56,8	259	232	207	170	233	-10,6	37,5	12,6
Pakistan	1.437	1.574	786	962	8.264	9,5	759,2	951,0	103	112	45	54	905	8,6	1578,7	1933,3
India	29.752	27.852	23.046	21.316	24.709	-6,4	15,9	7,2	747	676	603	543	1.184	-9,5	118,0	96,4
Turkey	34.185	51.727	20.862	29.230	50.181	51,3	71,7	140,5	1.343	1.772	674	973	1.683	31,9	72,9	149,9
Morocco	35.280	46.876	24.563	33.680	35.759	32,9	6,2	45,6	1.670	1.836	1.038	1.175	1.357	9,9	15,5	30,7
Tunisia	31.819	33.620	20.283	22.695	23.029	5,7	1,5	13,5	1.256	1.267	751	825	720	0,9	-12,7	-4,1
World	991.973	1.094.557	695.797	739.984	897.629	10,3	21,3	29,0	32.920	93.399	20.252	49.305	82.841	183,7	68,0	309,1
world - china	520.884	555.987	355.415	359.704	425.082	6,7	18,2	19,6	16.547	18.335	10.661	11.723	15.311	10,8	30,6	43,6
Candidate 10:	162.042	161.356	114.631	103.004	114.906	-0,4	11,6	0,2	4.650	4.718	3.069	2.868	3.348	1,5	16,7	9,1

Cat 18	thousand euro					growth in %			thousand euro					growth in %		
	2001	2002	S1 2001	S1 2002	S1 2003	2001/2002	S1 03/02	S1 03/01	2001	2002	S1 2001	S1 2002	S1 2003	2001/2002	S1 03/02	S1 03/01
China	208.866	251.826	72.422	88.642	100.421	20,6	13,3	38,7	7.361	19.436	2.339	5.627	9.788	164,0	73,9	318,5
East Asia	298.730	305.130	111.602	112.994	118.383	2,1	4,8	6,1	11.143	21.836	3.803	6.600	10.610	96,0	60,8	179,0
East Asia - China	89.864	53.304	39.180	24.352	17.962	-40,7	-26,2	-54,2	3.782	2.400	1.464	973	822	-36,5	-15,5	-43,8
Bangladesh	14.152	11.696	3.492	4.043	4.456	-17,4	10,2	27,6	1.124	1.041	238	270	415	-7,4	53,7	74,5
Pakistan	37.156	36.902	15.681	16.145	16.793	-0,7	4,0	7,1	6.192	6.950	2.596	3.135	3.933	12,2	25,5	51,5
India	68.060	61.924	30.540	29.906	28.605	-9,0	-4,4	-6,3	4.606	4.394	1.824	1.977	1.913	-4,6	-3,2	4,9
Turkey	139.294	141.504	62.270	58.403	63.924	1,6	9,5	2,7	11.143	11.683	4.908	4.802	5.472	4,8	14,0	11,5
Morocco	37.245	36.375	18.383	16.974	15.152	-2,3	-10,7	-17,6	1.353	1.730	737	928	539	27,9	-41,9	-26,9
Tunisia	85.255	86.192	43.373	47.122	41.834	1,1	-11,2	-3,5	3.619	3.881	1.831	2.135	1.537	7,2	-28,0	-16,1
World	849.697	814.053	361.664	349.253	343.194	-4,2	-1,7	-5,1	47.178	59.137	19.312	23.350	27.540	25,4	17,9	42,6
world - china	640.832	562.227	289.242	260.611	242.773	-12,3	-6,8	-16,1	39.816	39.701	16.973	17.723	17.753	-0,3	0,2	4,6
Candidate 10:	49.527	31.406	23.654	15.517	13.866	-36,6	-10,6	-41,4	1.796	1.482	827	728	619	-17,5	-14,9	-25,1

Cat 21	thousand euro					growth in %			thousand euro					growth in %		
	2001	2002	S1 2001	S1 2002	S1 2003	2001/2002	S1 03/02	S1 03/01	2001	2002	S1 2001	S1 2002	S1 2003	2001/2002	S1 03/02	S1 03/01
China	701.384	1.430.476	215.717	320.087	511.546	104,0	59,8	137,1	32.561	129.349	9.477	21.884	42.293	297,2	93,3	346,3
East Asia	1.504.552	1.858.856	523.871	513.197	623.329	23,5	21,5	19,0	74.014	152.242	22.667	31.339	47.957	105,7	53,0	111,6
East Asia - China	803.168	428.380	308.154	193.110	111.783	-46,7	-42,1	-63,7	41.453	22.893	13.190	9.456	5.663	-44,8	-40,1	-57,1
Bangladesh	119.397	74.864	53.492	33.666	21.914	-37,3	-34,9	-59,0	7.976	5.948	3.496	2.703	2.323	-25,4	-14,1	-33,6
Pakistan	15.205	19.200	6.574	9.389	10.407	26,3	10,9	58,3	1.194	1.724	498	812	910	44,4	12,1	83,0
India	53.143	35.043	18.092	14.333	11.738	-34,1	-18,1	-35,1	2.421	1.962	765	671	724	-18,9	7,9	-5,3
Turkey	120.789	129.910	45.401	58.771	44.010	7,6	-25,1	-3,1	4.999	5.642	1.758	2.532	1.801	12,9	-28,9	2,5
Morocco	72.376	66.777	26.682	26.634	21.471	-7,7	-19,4	-19,5	3.524	3.310	1.293	1.300	1.026	-6,1	-21,1	-20,6
Tunisia	84.304	77.177	39.018	38.085	37.068	-8,5	-2,7	-5,0	3.781	3.202	1.741	1.631	1.313	-15,3	-19,5	-24,6
World	3.106.143	3.293.604	1.157.989	1.111.619	1.110.871	6,0	-0,1	-4,1	143.739	215.305	49.361	56.316	68.789	49,8	22,1	39,4
world - china	2.404.759	1.863.128	942.271	791.532	599.326	-22,5	-24,3	-36,4	111.177	85.957	39.884	34.433	26.495	-22,7	-23,1	-33,6
Candidate 10:	239.954	244.504	104.789	105.261	98.471	1,9	-6,5	-6,0	7.307	6.637	3.149	2.735	2.436	-9,2	-10,9	-22,6

4.12. Categories liberalised during the 3rd stage of ATC where China had quotas

Cat 32	thousand euro					growth in %			thousand euro					growth in %		
	2001	2002	S1 2001	S1 2002	S1 2003	2001/2002	S1 03/02	S1 03/01	2001	2002	S1 2001	S1 2002	S1 2003	2001/2002	S1 03/02	S1 03/01
China	40.436	97.770	16.818	35.384	53.855	141,8	52,2	220,2	4.417	18.349	1.801	5.830	11.520	315,4	97,6	539,6
East Asia	64.475	110.660	28.865	42.378	57.296	71,6	35,2	98,5	7.267	19.810	3.170	6.613	11.898	172,6	79,9	275,4
East Asia - China	24.038	12.890	12.047	6.994	3.441	-46,4	-50,8	-71,4	2.850	1.461	1.368	783	378	-48,7	-51,7	-72,4
Bangladesh	0	0	0	0	0				0	0	0	0	0			
Pakistan	2.706	935	1.611	837	2.744	-65,4	227,9	70,3	563	188	368	174	865	-66,6	396,8	135,2
India	1.130	820	703	380	446	-27,4	17,6	-36,5	200	73	129	38	40	-63,5	6,4	-68,8
Turkey	9.406	11.671	5.474	5.715	7.036	24,1	23,1	28,5	1.088	1.295	667	620	831	19,1	34,1	24,6
Morocco	1.132	461	908	249	380	-59,3	52,6	-58,2	160	70	131	37	69	-56,1	85,7	-47,5
Tunisia	338	447	162	202	99	32,3	-50,9	-38,9	38	54	22	33	15	40,1	-55,2	-32,9
World	160.026	206.890	82.176	96.081	115.643	29,3	20,4	40,7	20.729	32.969	10.598	13.968	20.473	59,0	46,6	93,2
world - china	119.589	109.120	65.358	60.697	61.788	-8,8	1,8	-5,5	16.312	14.620	8.797	8.138	8.953	-10,4	10,0	1,8
Candidate 10:	49.071	51.973	27.733	28.407	29.158	5,9	2,6	5,1	7.361	7.568	4.079	4.158	4.226	2,8	1,6	3,6

Cat 68	thousand euro					growth in %			thousand euro					growth in %		
	2001	2002	S1 2001	S1 2002	S1 2003	2001/2002	S1 03/02	S1 03/01	2001	2002	S1 2001	S1 2002	S1 2003	2001/2002	S1 03/02	S1 03/01
China	553.732	650.819	249.433	284.920	294.420	17,5	3,3	18,0	20.563	42.977	8.911	15.156	25.499	109,0	68,2	186,2
East Asia	792.869	815.813	365.074	364.545	350.863	2,9	-3,8	-3,9	31.405	52.130	13.955	19.178	28.953	66,0	51,0	107,5
East Asia - China	239.138	164.994	115.641	79.625	56.443	-31,0	-29,1	-51,2	10.842	9.153	5.044	4.022	3.454	-15,6	-14,1	-31,5
Bangladesh	22.907	24.221	11.793	12.037	11.999	5,7	-0,3	1,7	1.701	2.010	880	985	1.165	18,2	18,4	32,4
Pakistan	7.260	8.124	3.382	4.224	5.334	11,9	26,3	57,7	698	4.689	296	4.297	504	572,2	-88,3	70,0
India	117.037	124.516	62.485	66.502	65.269	6,4	-1,9	4,5	6.882	7.824	3.596	3.911	4.401	13,7	12,5	22,4
Turkey	103.672	114.992	51.899	55.910	52.333	10,9	-6,4	0,8	5.784	6.393	2.806	3.034	3.223	10,5	6,2	14,9
Morocco	76.128	66.771	41.588	35.685	31.862	-12,3	-10,7	-23,4	3.362	2.880	1.835	1.562	1.524	-14,3	-2,5	-17,0
Tunisia	70.131	57.441	39.483	33.735	28.158	-18,1	-16,5	-28,7	3.694	2.851	2.157	1.626	1.432	-22,8	-12,0	-33,6
World	1.410.964	1.423.694	683.631	680.475	631.012	0,9	-7,3	-7,7	64.771	90.133	31.008	39.985	45.960	39,2	14,9	48,2
world - china	857.233	772.875	434.198	395.554	336.592	-9,8	-14,9	-22,5	44.208	47.156	22.097	24.830	20.461	6,7	-17,6	-7,4
Candidate 10:	50.048	40.204	26.808	19.427	16.185	-19,7	-16,7	-39,6	2.658	2.132	1.477	987	907	-19,8	-8,1	-38,6

Cat 73	thousand euro					growth in %			thousand euro					growth in %		
	2001	2002	S1 2001	S1 2002	S1 2003	2001/2002	S1 03/02	S1 03/01	2001	2002	S1 2001	S1 2002	S1 2003	2001/2002	S1 03/02	S1 03/01
China	65.794	116.292	26.827	42.702	55.455	76,8	29,9	106,7	4.929	12.026	1.961	3.985	8.095	144,0	103,1	312,9
East Asia	150.533	159.428	66.933	64.456	68.024	5,9	5,5	1,6	10.896	15.325	4.629	5.497	9.354	40,7	70,2	102,1
East Asia - China	84.739	43.136	40.105	21.754	12.569	-49,1	-42,2	-68,7	5.966	3.299	2.668	1.512	1.259	-44,7	-16,7	-52,8
Bangladesh	11.197	6.973	5.413	2.653	2.035	-37,7	-23,3	-62,4	1.120	667	529	247	236	-40,5	-4,5	-55,5
Pakistan	6.242	7.255	1.888	2.355	3.570	16,2	51,6	89,1	656	585	176	220	389	-10,8	76,4	120,4
India	3.444	4.029	1.176	1.475	1.671	17,0	13,3	42,1	320	349	105	135	168	9,1	24,0	60,1
Turkey	17.320	18.431	5.994	6.080	14.001	6,4	130,3	133,6	1.253	1.247	374	387	1.104	-0,5	185,3	195,2
Morocco	22.807	11.727	9.363	5.523	4.011	-48,6	-27,4	-57,2	1.886	737	767	376	350	-60,9	-7,0	-54,4
Tunisia	1.847	3.509	1.011	2.922	1.147	90,0	-60,8	13,4	126	127	71	106	64	1,2	-39,5	-9,1
World	270.026	260.136	116.633	107.319	111.229	-3,7	3,6	-4,6	21.229	23.024	8.943	8.718	13.113	8,5	50,4	46,6
world - china	204.232	143.844	89.805	64.617	55.774	-29,6	-13,7	-37,9	16.300	10.997	6.983	4.733	5.018	-32,5	6,0	-28,1
Candidate 10:	9.670	8.442	4.982	4.367	3.136	-12,7	-28,2	-37,0	636	541	324	260	175	-14,9	-32,7	-45,9