

Summary

I. EU27 Short-term business statistics

Methodological note: the short term indices are based on the new NACE Rev.2 and the year base 2005=100

After the dramatic drop occurred in 2009, -17% as compared with 2008, Textile **production** picked up with a +5.3% increase during the January-April 2010 period. Similarly, the situation in the Clothing sector recovered (+0.5%) after the 2009 double digit slump. Finally, the evolution of the man-made fibre industry registered a clear upswing during that period (+27.8% as compared with January-April 2009). On a monthly basis, the indicators confirm the gradually improvement of the situation in the T&C sector.

Retail sales slowed down in 2008 and 2009 but during the 1st quarter 2010 consumers drove retail sales up 2.7% as compared to the same period of the previous year. Still, the **employment index** registered another sharp drop in the textile and clothing sector, respectively -11% and -12%, showing prospects for employment recovery weak despite the pick-up in output.

New orders slipped back in previous years but stronger orders during the 1st quarter 2010, in particular in the textile industry, suggest the economy is recovering (+6.6%). Nonetheless, the situation in the clothing industry remains fragile as new orders dropped by -9.4% over the period.

II. EU-27 Import and export statistics

Overall EU textile and clothing **imports** decreased by -5% in value during the first quarter 2010. The soaring imports of textile products (7.4%) were not able to compensate the decline of imported apparel articles (-9.1%). All main textile and clothing suppliers but Turkey did not managed to maintain a positive growth. However the surge of European textile imports - in particular from China and Turkey- indicates stabilising domestic demand conditions. During that period, all largest suppliers decreased their unit prices as compared with the first quarter 2009, with the exception of Tunisia.

On the contrary, EU textile and clothing **exports** went up (+2% in value terms) during the period under review. This result is ascribable to the textile sector which recorded a double digit increase (+14%) during the first quarter 2010. The sizeable exports growth witnessed in this sector on the main EU markets, except the U.S one, indicates as well improving external demand conditions.

Data Source:

Euratex based on Eurostat figures.



I- EU27 Economy - Short-term business statistics

(Source: Euratex based on Eurostat data)

Production	Annual*, based on previous year			Year-to-date**	Month**, based on same month of previous year		
% Evolution	07/06	08/07	09/08	Jan-April 10 / 09	Feb.	Mar.	Apr.
Manufacturing	4,08	-1,85	-14,98	5,2%	4,20%	7,09%	7,74%
Man-Made fibres	0,83	-8,17	-21,60	27,8%	29,60%	27,35%	23,60%
Textile	-1,25	-9,79	-17,34	5,4%	6,44%	6,91%	6,70%
Clothing	2,27	-3,29	-11,49	0,5%	-6,94%	5,18%	7,96%

* Data adjusted by working days

** Seasonally adjusted data

Employment	Annual*, based on previous year			Year-to-date**	Quarter**, based on same quarter of previous year		
% Evolution	09/08	08/07	07/06	Jan-March 10 / 09	2009Q3	2009Q4	2010Q1
Manufacturing	-7,28	-0,11	0,46	-7,0%	-8,51%	-8,04%	-7,01%
Textile	-13,32	-6,38	-5,29	-11,1%	-14,28%	-12,36%	-11,10%
Clothing	-12,61	-6,21	-5,88	-12,0%	-12,92%	-12,31%	-12,01%

* Gross data

** Seasonally adjusted data

New Orders	Annual, based on previous year*			Year-to-date**	Month**, based on same month of previous year		
% Evolution	07/06	08/07	09/08	Jan-March 10 / 09	Jan.	Feb.	Mar.
Manufacturing	10,65	-4,98	-21,92	14,4%	9,98%	12,99%	20,39%
Textile	2,47	-9,98	-16,67	6,6%	-0,71%	5,23%	15,42%
Clothing	9,40	-1,15	-16,05	-9,4%	-14,24%	-14,42%	1,21%

* Gross data

** Seasonally adjusted data

Retail sales	Annual, based on previous year*			Year-to-date**	Month**, based on same month of previous year		
% Evolution	07/06	08/07	09/08	Jan-March 10 / 09	Jan.	Feb.	Mar.
T&C, Footwear, Leather	4,85	-0,42	-0,37	2,7%	0,43%	2,39%	5,33%

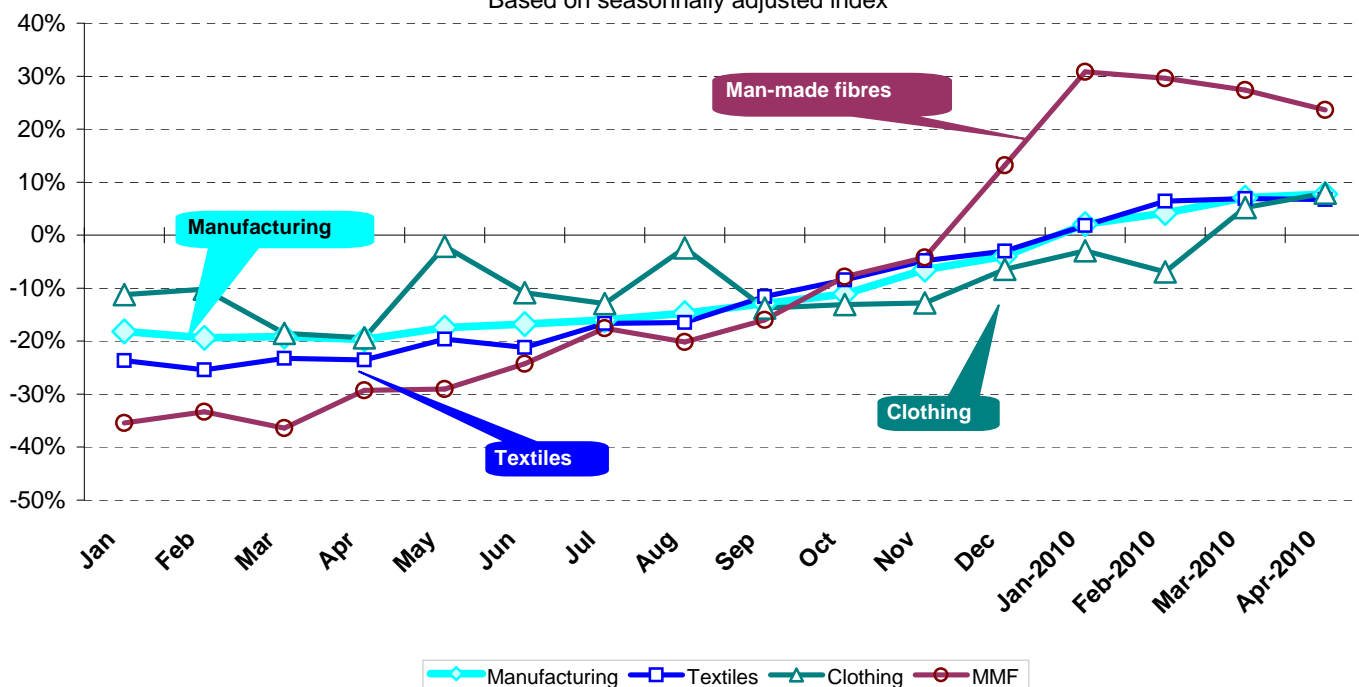
* Data adjusted by working days

** Seasonally adjusted data

Monthly evolution -EU 27 Production Index

(% Evolution : same month previous year)

Based on seasonally adjusted index



II- EU27 Trade - Import and export statistics

(Source: Euratex based on Eurostat data)

000 Euro	IMPORTS			EXPORTS			Trade Balance		
	1Q2009	1Q2010	% 10/09	1Q2009	1Q2010	% 10/09	1Q2009	1Q2010	% 10/09
TOTAL	20.442.389,10	19.355.280,36	-5,3%	7.831.233,74	7.989.170,05	2,0%	-12.611.155,36	-11.366.110,31	-9,9%
Textile*	4.658.142,63	5.003.336,36	7,4%	3.593.860,66	4.094.834,66	13,9%	-1.064.281,97	-908.501,70	-14,6%
Clothing**	15.784.246,47	14.351.944,00	-9,1%	4.237.373,08	3.894.335,39	-8,1%	-11.546.873,39	-10.457.608,61	-9,4%

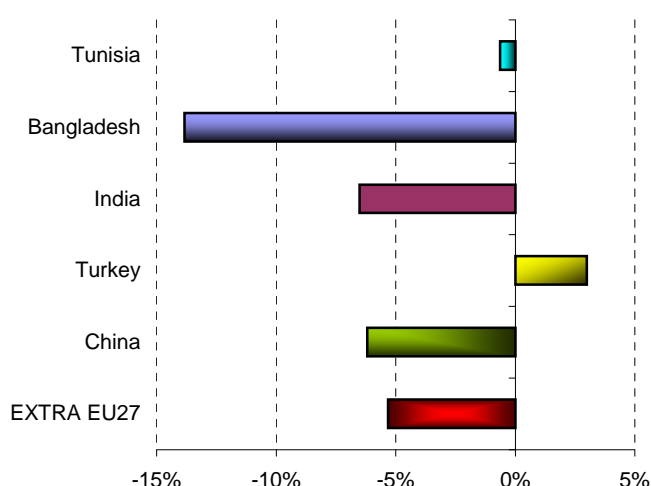
* HS chapters 50-60 + 63

** HS chapters 61+62

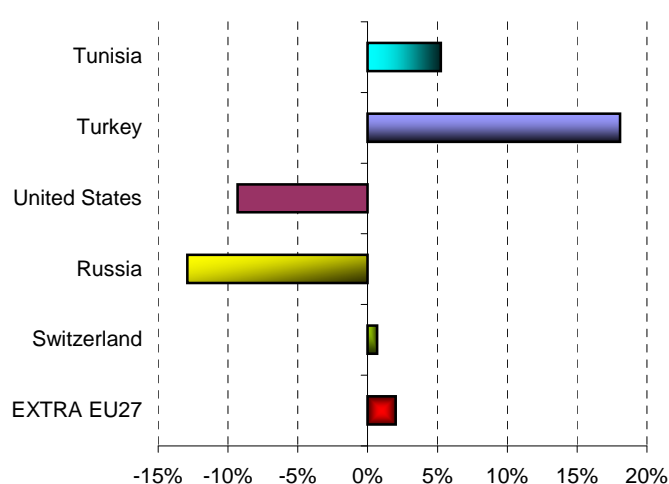
EU27 - TOP TEXTILE AND CLOTHING TRADE PARTNERS

IMPORTS	1Q2009		1Q2010		Evolution 10/09 %		
	000EUR	Quantity (T)	000EUR	Quantity (T)	EUR	Quantity	Prices
EXTRA EU27	20.442.389	2.345.475	19.355.280	2.488.389	-5,3%	6,1%	-10,8%
China	8.326.385	845.453	7.810.605	912.162	-6,2%	7,9%	-13,1%
Turkey	2.629.147	274.586	2.707.674	299.762	3,0%	9,2%	-5,7%
India	1.797.211	237.850	1.680.205	252.191	-6,5%	6,0%	-11,8%
Bangladesh	1.480.771	170.422	1.275.825	166.750	-13,8%	-2,2%	-11,9%
Tunisia	680.017	35.656	675.724	33.862	-0,6%	-5,0%	4,6%
EXPORTS	1Q2009		1Q2010		Evolution 10/09 %		
	000EUR	Quantity (T)	000EUR	Quantity (T)	EUR	Quantity	Prices
EXTRA EU27	7.831.234	912.498	7.989.170	1.060.034	2,0%	16,2%	-12,2%
Switzerland	1.055.007	42.558	1.062.273	48.062	0,7%	12,9%	-10,8%
Russia	877.836	39.091	764.449	45.527	-12,9%	16,5%	-25,2%
United States	770.625	62.149	698.863	63.579	-9,3%	2,3%	-11,4%
Turkey	421.106	83.757	497.196	117.340	18,1%	40,1%	-15,7%
Tunisia	355.507	57.906	374.123	58.827	5,2%	1,6%	3,6%

EU IMPORTS* (1st Quarter 2010/2009%)



EU EXPORTS* (1st Quarter 2010/2009%)



* Evolutions based on values.