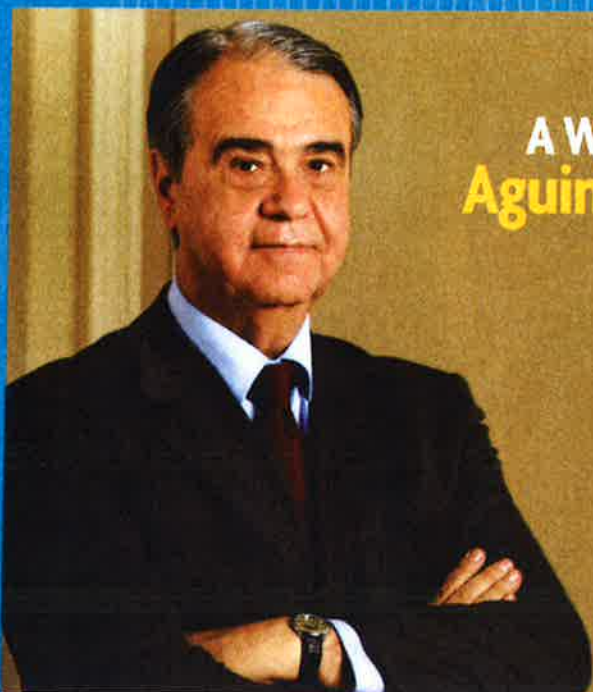


INTERNATIONAL TEXTILE MANUFACTURERS FEDERATION  
FÉDÉRATION INTERNATIONALE DES INDUSTRIES TEXTILES  
INTERNATIONALE VEREINIGUNG DER TEXTILINDUSTRIE



国 际 纺 织 制 造 商 联 合 会

年会 Conference 10  
October 17-19, 2010, São Paulo, Brazil  
巴西圣保罗市举行2010年10月17-19日



## A Welcome From **Aguinaldo Diniz Filho**

欢迎业者出席年会

ABIT主席畅谈对2010年ITMF研讨会的展望，并论及巴西纺织业的市场形势。

ABIT president discusses expectations for 2010 ITMF conference and the market situation for Brazil's textile industry.

撰文：翟立甫，执行编辑

By Jürg Rupp, Executive Editor

**瑞**士的国际纺织品生产商协会(ITMF)将于今年10月17至19日在巴西圣保罗市举行2010年度研讨会。巴西纺织及成衣业商会(ABIT)主席Aguinaldo Diniz Filho代表大会欢迎《亚洲纺织世界》的读者出席研讨会，并表示ITMF年会将对巴西纺织业带来重大的影响。

《亚洲纺织世界》：Diniz，你对ITMF研讨会有甚么期望？各国代表为何要前往圣保罗市呢？

**Diniz**：这是巴西纺织业的重要时刻，因为研讨会是将巴西及全球生产商连系起来的良机。能够接待全球纺织业的代表，向他们介绍巴西纺织业的潜力，是我们的荣幸！我们希望本年会将对同ITMF组织一起致力筹办本研讨会的各方人士会有很大的帮助。

参与ITMF年会实在是加强个人网络、紧随行业步伐的好机会。圣保罗市的研讨会将为各界代表提供富有巴西特色的业内活动；研讨会的主题除了零

售、可持续性，以及巴西与全球各国的个案研讨外，我们亦会以巴西的礼节接待来自全球的优秀业者及重要的商业伙伴。

《亚洲纺织世界》：作为ABIT主席，你的理念如何？目标又如何？

**Diniz**：我以透明度及沟通的理念管理组织，出席我们会议的，包括纤维、纺织、成衣，以至衣物零售商等纺织业连系链内的代表。我们的共同理念是促进行业的发展，为巴西人民提供更多的就业机会。

业内讨论的，均为致力提高行业竞争力的重要议题——免税、开拓可行的借贷方式、免除投资及国际协议的限制等。另外，环境、劳动法、社会保障及公平等，亦是我们的重点课题。

《亚洲纺织世界》：巴西纺织业未来的发展如何？

**Diniz**：巴西纺织业现时面对着两大局面。其一是强大的国内市场，这也是我们最大的资产。国内市场今年大为蓬勃，

The International Textile Manufacturers Federation Switzerland, will hold Annual Conference Paulo, Brazil, October 17-19. Textile and Apparel Industry tion (ABIT) President Ag Diniz Filho welcomes the **Textile World Asia** to the c which will play a very impor for the Brazilian textile industr

**TW Asia**: Mr. Diniz, what do you expect from the ITMF conference in São Paulo? Why should the delegates come to São Paulo?

**Diniz**: It is a big moment for the Brazilian textile industry. It will be an excellent opportunity to bring Brazilian producers and international producers together. It is an honor to receive so many representatives of the textile world and to see some of the potential of the international textile sector. We also expect the conference to be extremely useful for everyone working very hard on these issues together with the ITMF.

预期可促进不少行业的发展，创造更多的职位。而另一局面是，巴西有望打破以往贸易逆差的纪录。巴西为生产商提供的生产条件，实在是其它国家难以比拟的，我们期望在为产品增值之外，又同时能减少汇率、物流、税收、利率等因素对于商品的影响。我们不仅仅满足于供应国内市场，我们亦有能力做出更多，不过，我们必须和政府合作，减少与其它国际业者之间的不平衡情况。

《亚洲纺织世界》：你认为全球经济有否复苏的迹象？

**Diniz:** 美国虽然缓慢地在复苏，但国内失业率仍然很高。欧盟整体落后，部分欧洲国家依然面对强大的衰退压力。不过，美国的经济越快复苏，便越会带领其它国家向好。

《亚洲纺织世界》：圣保罗市有什么是游客不能错过的？

**Diniz:** 巴西文化多样。圣保罗市是南美洲最大的城市，因此与全球其它大城市一样，为游客提供大量具有不同文化、经济及艺术特色的餐馆、酒吧、博物馆、公园及小区设施。

《亚洲纺织世界》：你认为巴西最大优势是什么？

**Diniz:** 巴西地域广如一洲，由多种民族、文化共融而成，因而形成了我们的基因。巴西最大的优点是人民心境欢愉、热情好客，我们将本着这些优点接待出席2010年ITMF年会的各国代表。 **TW Asia**

Attending the ITMF Annual Conference is always an opportunity to increase one's network and stay up-to-date with global issues in the sector. Specifically in São Paulo, delegates will have a conference with a touch of Brazilian DNA. In addition to including issues about retail, sustainability and cases from Brazil and the world, we also hope to imprint the Brazilian style of receiving illustrious visitors and important business partners.

**TW Asia:** As ABIT president, what is your philosophy, and what are your targets?

**Diniz:** My philosophy is transparency and dialogue, especially as we gather at the same meeting all segments of the textile chain, from fiber, textiles, the apparel industry, and even some clothing retailers. The sector's philosophy is to generate jobs and income for Brazilians by strengthening the sector.

We have themes that are important to further increase our competitiveness — tax exoneration, more accessible lines of credit, exoneration of investments and international agreements. Also important are themes such as environment, labor laws, social security and fair conditions.

**TW Asia:** How do you see the market situation for Brazil's textile industry?

**Diniz:** We have two realities in the textile sector: One is the huge domestic market, our greatest asset. The market is heated up this year and will ensure the growth of many industries, which means more jobs. On the other hand, we will break the record for our trade balance deficit. It

is impossible to reproduce in Brazil the conditions producers have in other parts of the world. We are looking to add value to our products and at the same time reduce the impacts of the exchange rate, logistics, taxes and interest rates on these products. We don't want to produce only for our domestic market; we have the capacity to do much more. But we must work with the government to reduce this disequilibrium with other international players.

**TW Asia:** Do you see signs of economic recovery around the world?

**Diniz:** The USA is slowly beginning to recover, but there is still a lot of unemployment. The EU is still lagging behind, with some countries experiencing a strong recession. But the faster the American recovery takes place, the sooner it will pull others towards a more promising scenario.

**TW Asia:** What should people not miss when they come to São Paulo?

**Diniz:** Brazil has tremendous diversity. São Paulo is the largest city in South America. Thus, like the other great cities in the world, São Paulo offers a very great variety of restaurants, bars, museums, parks and neighborhoods characterized by different cultures and economic and artistic segments.

**TW Asia:** What is Brazil's best?

**Diniz:** Our mix of races and cultures, developed in harmony in a continental-sized country, resulted in our DNA. Brazil's best is its people, with their joy and hospitality. That is how we want to welcome the delegates to the 2010 ITMF Annual Conference. **TW Asia**

## 世界棉花生产 World Cotton Production

(millions of 480 lb-bales • 百万480-捆)

	2006/07	2007/08	2008/09	2009/10	2010/11 July/七月
China • 中国	35.5	37.0	36.7	32.5	33.0
India • 印度	21.8	24.0	22.6	23.5	25.0
US • 美国	21.6	19.2	12.8	12.2	18.3
Pakistan • 巴基斯坦	9.9	8.6	8.7	9.6	10.2
Brazil • 巴西	7.0	7.4	5.5	5.8	7.0
Uzbekistan • 乌兹别克	5.4	5.4	4.6	4.0	4.8
Turkey • 土耳其	1.4	0.6	1.5	1.6	2.2
Australia • 澳洲	3.8	3.1	1.9	1.8	2.1
African Franc Zone • 非洲法郎区	3.4	2.3	2.2	2.0	1.7
EU-27 • 欧盟-27	1.6	1.7	1.2	1.0	1.4
Turkmenistan • 土库曼	1.2	1.3	1.4	1.3	1.3
Greece • 希腊	1.4	1.6	1.2	0.9	1.2
Syria • 叙利亚	1.0	1.1	1.1	1.0	1.0
Argentina • 阿根廷	0.8	0.7	0.6	0.8	0.9
Burkina • 布基纳法索	1.3	0.7	0.9	0.7	0.9
Others • 其他	7.7	7.4	6.3	5.5	6.3
<b>Total • 总计</b>	<b>122.0</b>	<b>119.8</b>	<b>107.2</b>	<b>102.5</b>	<b>116.0</b>

Source: US Department of Agriculture (USDA)

资料来源: 美国农业部

Table 1 • 表1

# Brazil 巴西

## And Its Textile Industry 及它的纺织产业

*Brazil boasts an expanding textile and apparel industry and one of the fastest-growing economies worldwide.*

巴西拥有蓬勃发展的纺织服装产业，也是全球经济发展最快的国家之一。

By Jürg Rupp, Executive Editor • 撰文: 翟立甫, 执行编辑

The Brazilian textile and apparel industry comprises more than 30,000 companies in the textile and apparel sectors, generating some 14 million to 15 million jobs, both direct and indirect. Brazil is among the top 10 textile industry markets worldwide and among the top five as an apparel producer.

The Federative Republic of Brazil is the largest country in South Amer-

ica, and one of the richest countries in terms of natural resources, environment and wildlife. The Federation is formed by the union of the Federal District and 26 states.

### Bright Future

Today, the Brazilian economy is the world's eighth-largest by nominal gross domestic product (GDP) and the 10th-largest by purchasing power.

巴西纺织服装业包括了3万多家服装企业，间接创造了1500万个工作岗位。它是全球10大纺织品市场也是位列前五名的服装大国。

巴西共和国是南美国家，也是在自然、野生动物方面具有丰富国家之一。共和国由区和26个州共同组成。

### 光明的未来

今天，巴西经济体国民生产总值(GDP)位列全球第八位，就购买力而言位列全球第十。该国国内市场规模在全球屈指可数，也是今天发展最迅速经济体之一。这就是它能够成为G20的成员及联合国会员国和南方市场(MERCOSUR)成员的原因。

2010年上半年创造了150万个岗位，达到历史最高水平。在2009年同期，由于金融危机影响，巴西经济创造了29.9万个岗位。正信，巴西经济将在2010年创造总共250万个岗位。

经济合作及发展组织(OECD)预测，巴西2010年经济增长将达到6.5%，比之前预计的4.8%要高于2011年，该国经济将增长4.5%。受国际金融危机影响，巴西经济在2009年收缩了0.2%。

OECD并不是唯一预计巴西将在2010年获得增长的机构。最近一期Focus市场调查显示，巴西的金融部门今年预计增长6.46%。巴西政府最近

测是增长5.5%。据OECD表示,俄罗斯、印度以及中国—金砖四国中的其它成员,也在经历稳定的扩张,今年都将迎来正增长率。

### 棉花及纺织品生产大国

巴西是第五大棉生产国,排在中国、印度、美国和巴基斯坦之后(见表1)。巴西的棉花每公顷单产非常高,特别是在Mato Grosso州。

由于购买了现代设备以及将技术发展应用到生产中,巴西纺织产业在不断增长,更不用说通过培训项目获得专业人才以及不断增长的生产力的推动。这一发展计划已经投入了超过80亿美元。它的目标是在全球化和市场竞争中将巴西的纺织产业打造得更强大。

巴西有近400万个环锭纺锭和33万个气流纺转杯在运行。它生产并消费了全球棉花作物的5%。巴西每年生产大约120万公吨的棉花,并向印度尼西亚、巴基斯坦、日本和阿根廷出口近40万吨棉花。

### 巴西纺织服装工业联合会

巴西纺织服装工业联合会(ABIT)代表整个巴西的纺织产业链。ABIT成立于上个世纪60年代初,它覆盖了纺织行业内的每个产业环节,包括棉种植、合成原料、纺织纤维、纺纱、梭织、针织服装、染色、印花和成衣制造。ABIT积极参与纺织行业的进展。作为巴西工业化的先锋,纺织行业在国内经济中的地位突出。ABIT也与社会和环境领域的

The country is one of the largest domestic markets in the world and one of the fastest-growing economies today. That's why it is a member of the G20, but also a member of the United Nations and the Southern Common Market (MERCOSUR).

In the first half of 2010, more than 1.5 million jobs were created, a record high. During the same period in 2009, the Brazilian economy generated only 299,000 jobs owing to the international financial crisis. The government believes the Brazilian economy will create a total of 2.5 million jobs in 2010.

The Organization for Economic Cooperation and Development (OECD) predicts an economic growth rate of 6.5 percent in 2010 for Brazil — higher than the previous estimate of 4.8 percent. For 2011, the economy is expected to grow 4.5 percent. Due to the effects of the international financial crisis, the economy contracted by 0.2 percent in 2009.

The OECD is not the only institution to predict a high growth rate for Brazil in 2010. In the most recent Focus market survey, the Brazilian financial sector projected 6.46-percent growth for this year. The Brazilian government's most recent estimate is 5.5-percent growth. According to the OECD, Russia, India and China — the other countries in the BRIC group — are undergoing a solid expansion as well, and will register positive figures this year.

### Big Cotton And Textile Producer

Brazil is the fifth-largest producer of cotton, after China, India, the United States and Pakistan (See Table 1). The yield per hectare of cotton is rather high in Brazil, especially in the state of Mato Grosso.

The Brazilian textile industry is constantly growing owing to the acquisition of modern equipment

## 世界棉花消费 World Cotton Consumption

(millions of 480 lb-bales • 百万480-捆)

	2006/07	2007/08	2008/09	2009/10	010/11 July/七月
China • 中国	50.0	51.0	44.0	47.5	49.0
India • 印度	18.1	18.6	17.8	19.6	20.4
Pakistan • 巴基斯坦	12.0	12.0	11.3	11.5	11.6
Turkey • 土耳其	7.3	6.2	5.1	5.6	5.7
Brazil • 巴西	4.6	4.6	4.2	4.4	4.6
Bangladesh • 孟加拉	3.2	3.5	3.8	4.0	4.3
US • 美国	4.9	4.6	3.6	3.4	3.4
Indonesia • 印尼	2.2	2.2	2.0	2.1	2.1
Mexico • 墨西哥	2.1	2.0	1.9	1.9	1.9
Vietnam • 越南	1.0	1.2	1.3	1.6	1.8
Thailand • 泰国	2.0	2.0	1.6	1.8	1.8
Uzbekistan • 乌兹别克	0.9	1.0	1.0	1.1	1.2
South Korea • 南韩	1.1	1.0	1.0	1.0	1.0
Taiwan • 台湾	1.2	1.0	0.8	1.0	1.0
Egypt • 埃及	1.0	1.0	0.9	0.9	0.9
Others • 其他	12.3	11.5	9.9	9.3	9.2
<b>Total • 总计</b>	<b>123.8</b>	<b>123.3</b>	<b>109.9</b>	<b>116.6</b>	<b>119.7</b>

Source: USDA • 资料来源: 美国农业部

Table 2 • 表2

and technical development applied to production, and also the promotion of its professionals through training programs and increasing productivity. This development program has already invested more than \$8 billion. Its objective is to strengthen Brazil's textile industry in the globalized and competitive market.

Brazil has around 4 million ring spindles and 330,000 rotors in operation. It produces and consumes 5 percent of the world's total cotton crop. Producing approximately 1.2 million metric tons of cotton annually, Brazil exports almost 400,000 metric tons to Indonesia, Pakistan, Japan and Argentina.

### ABIT

The Brazilian Textile and Apparel Industry Association (ABIT) represents the integration of the Brazilian textile chain. Founded in the early 1960s, ABIT sponsors companies in every segment in the textile industry, including cotton growing, synthetic raw materials, textile fibers, spinning, weaving, knitwear, dyeing, printing and apparel. ABIT participates actively in the evolution of the textile sector. A pioneer in the industrialization of Brazil, the textile sector stands out within the domestic economy. ABIT also coordinates relevant initiatives in the social and environmental arenas, besides sponsoring the sustainable growth of the industry.

### TexBrasil

Created in 2001, the Brazilian Textile Chain Strategic Program (TexBrasil) states its mission is to support and prepare sector companies to present, in an organized way, Brazilian products in international markets.

Using various tools and actions, it aims to increase the platform of Brazilian export companies, encouraging their inclusion in the global market.

In 2009, the total turnover for the textile sector was \$47 billion, and exports exceeded \$1.8 billion. During the same year, the sector generated a deficit of \$1.5 billion and created more than 66,000 job openings. In terms of consumption, Brazil holds fifth place after China, India, Pakistan and Turkey.

### Ambitious Targets

Intensely investing in the excellence of domestic production, the textile sector intends to expand its operations. The domestic Brazilian market comprises 190 million consumers. In addition, the textile sector aims to recover its 1-percent share of the world market, which is equivalent to increasing the volume of exports to \$4 billion per year. In 2010, the Brazilian textile industry expects to grow beyond the GDP and predicts an increase in consumption of textiles on the order of 12 percent.

These are ambitious targets, but by paving the way with adequate planning, such goals are surely compatible with the Brazilian reality. To achieve such aims, new investments in technology will be essential. Moreover, the country relies on the required managerial maturity besides the creativity of its professionals. Within such a context, it is essential for the textile sector to join efforts and multiply convergences and know-how. ABIT supports such missions and offers the Brazilian textile market all the necessary support to meet the above-mentioned goals.

相关机构合作，支持业的可持续发展。

### 巴西纺织产业链战略计划

巴西纺织产业链战略计划 (TexBrasil) 在2001年提出的宗旨是支持并协助该企业的有组织的向国际展示巴西产品。通过各种具和活动，它的目标是巴西出口企业的平台，它们融入全球市场。

2009年纺织行业的总额是470亿美元，出口额18亿美元。同年，该行生了15亿亏损，创造了多个岗位。就消费而言巴西排在中国、印度、巴基斯坦和土耳其之后列第五位。

### 野心勃勃的目标

国内生产的出色表现有了积极的投资，纺织行不断扩大规模。巴西市场是全世界最大的市一，有1.9亿个消费者。纺织行业致力于恢复它球市场1%的份额，这着它的出口额将增长到40亿美元。2010年，巴织行业的增长速度预计过GDP，纺织品的消费目标预计为12%。

这些是野心勃勃的目标但是有充分的计划来铺这些目标与巴西的实际是完全符合的。要达到目标，技术上的投资非键。此外，这个国家需靠必要的成熟管理，以的专业人才的创造性。此，对于纺织行业齐力，将专业知识最大限挥出来非常重要。ABIT

这些使命，为巴西纺织市场提供一切必要的帮助来支持他们达到上述目标。

### 时尚的巴西

然而，巴西不仅仅在棉纺和服装行业发挥着日益重要的作用。为了生产出更具附加值的产品，很多巴西服装生产商正在朝着更加时尚的面料和产品前进。为了支持这些行动，第二届Première Brasil巴西视觉展，这项拉丁美洲纺织行业的盛事于2010年7月在圣保罗的泛美展览中心举办。这次展会推出了2011秋/冬面料、纱线、纤维及辅料系列。它获得了TexBrasil巴西纺织行业供应链战略计划的支持——这是ABIT与Apex-Brasil，联合巴西时装设计师协会(ABEST)及Sinditêxtil-SP公司共同推出的。这项展会是由位于巴黎的第一视觉展览公司(Première Vision)与巴西的Fagga展会公司联合举办。

作为第二届展会，它吸引了来自8个国家的67名参展商，包括巴西、法国、西班牙、意大利、土耳其、英格兰、德国和匈牙利。与第一届展会相比，参展商的数量增长了49%。

巴黎第一视觉公司常务董事Jacques Brunel表示，本次活动为拉丁美洲国家提供了与国际时装界接轨的机会，让他们提前一年接触到未来流行的色彩和面料。Brunel还表示，该项展会在巴西的首次亮相加强对拉丁美洲市场及纺织产业的认知，意味着巴西将成为一个业务拓展的起点。 **TW Asia**

## 巴西棉花出口 Brazilian Cotton Exports

(millions of 480 lb-bales • 百万480-捆)

	2009		2008		Relative Variations 相对变化	
	Value	Volume	Value	Volume	(09/08)	
	million USD 以百万美元计	met tons 公吨	million USD 以百万美元计	met tons 公吨	Value 价值	Met Tons 公吨
Indonesia • 印尼	174,749	128,404	119,844	90,590	45.81	41.74
South Korea • 南韩	135,735	96,964	100,780	78,489	34.68	23.54
China • 中国	66,797	49,065	32,334	23,725	106.58	106.81
Pakistan • 巴基斯坦	58,371	43,089	149,902	113,425	-61.06	-62.01
Thailand • 泰国	41,591	30,086	46,029	34,470	-9.64	-12.72
Taiwan • 台湾	40,919	29,415	29,605	22,366	38.22	31.52
Switzerland • 瑞士	21,569	18,003	35,965	30,173	-40.03	-40.33
Argentina • 阿根廷	19,047	14,479	35,777	27,743	-46.76	-47.81
Vietnam • 越南	17,380	13,719	9,713	7,456	78.94	84.00
North Korea • 南北	17,175	13,559	31,761	24,773	-45.92	-45.27
Japan • 日本	17,269	12,041	38,364	31,371	-54.99	-61.62
Turkey • 土耳其	16,749	11,920	18,013	13,595	-7.02	-12.32
Malaysia • 马来西亚	12,243	8,815	4,758	3,389	157.31	160.11
Bangladesh • 孟加拉	6,074	4,621	4,035	2,815	50.53	64.16
Chile • 智利	5,079	4,569	2,010	1,606	152.69	184.50
Others • 其他	33,829	26,167	37,168	26,963	-8.98	-2.95
<b>Total • 总计</b>	<b>684,576</b>	<b>504,916</b>	<b>696,05</b>	<b>532,949</b>	<b>-1.65</b>	<b>-5.26</b>

Source: Análise das Informações de Comércio Exterior

资料来源: 外贸分析信息部

Table 3 • 表3

### Fashionable Brazil

But Brazil plays a growing role not only for cotton and apparel. To produce more value-added products, many Brazilian apparel producers are heading toward more fashionable fabrics and products. To support these activities, the second Première Brasil, a major Latin American textile industry event, took place in July 2010 at the Transamérica Expo Center in São Paulo. The show presented Fall/Winter 2011 collections of fabrics, yarns, fibers and accessories. It was supported by TexBrasil, the Brazilian Textile Chain Strategic Program developed by ABIT in partnership with Apex-Brasil, the Brazilian Association of Fashion Designers (ABEST) and Sinditêxtil-SP. The event is a joint venture between

Paris-based Première Vision S.A. and Brazil-based Fagga Events.

The second edition gathered 67 exhibitors from eight countries, including Brazil, France, Spain, Italy, Turkey, England, Germany and Uruguay. Compared to the first edition, there was a 49-percent increase in the number of exhibitors.

Jacques Brunel, managing director, Première Vision Paris, said the event provided to Latin American countries an alignment with the international fashion calendar upon presenting one year in advance the range of colors and fabrics for future collections. Brunel also said the first Brazilian version of the event helped reinforce the perception of strengthening the market and the textile sector in Latin America, pointing to Brazil as a starting point for expansion. **TW Asia**

执行董事 Fernando Pimentel 介绍巴西纺织行业以及 ABIT 在支持该产业发展中扮演的角色。

*Executive Director Fernando Pimentel discusses the Brazilian textile industry and ABIT's role in supporting its development.*

撰文: 翟立甫, 执行编辑  
Jürg Rupp, Executive Editor



## ABIT'S 在巴西的责任 Role in Brazil

**巴**西纺织服装行业协会 (ABIT) 代表着整个巴西的纺织行业。ABIT 成立于上个世纪60年代初, 它代表了全国整个纺织产业链上直接或间接关联的近3万家企业。ABIT 下属的行业委员会覆盖了以下方面:

- 机械、质量以及产生力/基础设施/标准;
- 财务和统计;
- 市场营销;
- 海外贸易;
- 纤维, 包括棉、原毛、毛条及毛纱、长丝纤维;
- 纺纱, 包括棉、人造纤维、粘胶纤维、亚麻、苧麻;
- 合成纤维变形工艺;
- 缝线;
- 梭织, 包括牛仔布;
- 针织;
- 经编;
- 制衣, 以及
- 家纺, 包括方毯和地毯。

Fernando Pimentel 自2005年起成为该协会的执行董事, 他从1976年开始就在纺织行业工作。他表示, ABIT 的使命是支持巴

西纺织行业的可持续发展, 在政府层面以及国际组织中代表本行业利益, 以及向大众宣传纺织行业。由 ABIT 所赞助的 ABIT 时尚奖将各行各业中的重量级人物聚集到一起, 展示巴西纺织企业所取得的杰出成绩。

### 推动国内纺织行业发展

《亚洲纺织世界》: Fernando Pimentel 先生, 你们是怎样推动巴西纺织产业?

**Pimentel:** 2001年, ABIT 在 Apex-Brasil (巴西贸易及投资促进局) 支持下, 推出 TexBrasil, 这项活动的目的是在海外推广巴西的纺织产品。在向全球市场推销巴西纺织产品的同时, TexBrasil 也针对出口开发出一些战略性项目, 通过相关的活动和课程激励巴西的企业扩大它们的出口。由 TexBrasil 开发的出口战略现在已经成为 Apex 的一项基准。

《亚洲纺织世界》: 针对国内纺织行业 ABIT 有什么措施?

**Pimentel:** 为了纺织行业能获得卓越表现, ABIT 专门开发了

**T**he Brazilian Textile Apparel Industry Assoc (ABIT) represents the Brazilian textile industry. Founded in the early 1960s, sponsors some 30,000 companies directly or indirectly working the whole textile production chain. The following aspects covered within ABIT's sub-committees:

- machinery, quality and productivity/infrastructure/standards
- finance and statistics;
- marketing;
- foreign trade;
- fibers, including cotton, wool, wool tops and yarn, staple fibers;
- spinning, including combed, man-made, viscose, linen, ramie;
- texturizing;
- sewing threads;
- weaving, including denim;
- knitting;
- warp knitting;
- apparel; and



专业的培训项目，支持社会及环境项目，还举办了其他活动。

《亚洲纺织世界》：作为执行董事，您想达到什么目标？

**Pimentel**：我的工作是在推动、组织及提出建议，以提高巴西纺织产业知名度。值得一提的是，ABIT获得了纺织行业各个领域内的50多名领袖的支持。即将到来的在圣保罗举行的ITMF年会的口号是——“社会责任、可持续及盈利”——与我们的理念非常吻合。我们呼吁所有的小型以大部分为中型企业的会员遵循道德、法律以及可持续发展的标准进行工作。

## 第二大产业

巴西纺织产业是紧随食品和饮料行业之后的第二重要产业。纺织行业的工人占了巴西所有工人数量的17%，有近700万工人直接从事这个行业，还有700-800万工人在分包商和供应商处间接为该行业服务。

《亚洲纺织世界》：巴西基本上算是一个棉花种植国家吗？

**Pimentel**：到目前为止，我们可以这样说。我们有近60%的纺织产品由棉花制成。但是，巴西加工出的人造纤维越来越多——主要是由于Petrobras，这是我国最大的企业之一，它主要生产家用石油产品。因此，人造纤维的重要性与日俱增，对出口行业来说也是如此。

## 市场状况

《亚洲纺织世界》：您如何看待目前的状况？巴西是否也受到了经济危机的影响？

**Pimentel**：幸好我们有巨大的国内市场，所以情况没那么

• home textiles, including rugs and carpets.

Fernando Pimentel, the association's executive director since 2005 and working in the textile industry since 1976, says ABIT's mission is to support the sustainable development of the Brazilian textile industry, representing its interests in the presence of governmental and international organizations, as well as making the textile sector better known to the general public. On event sponsored by ABIT is the ABIT Fashion Prize, bringing together key personalities of different sectors to publish outstanding achievements by Brazilian textile companies.

## Promoting The Domestic Textile Industry

**TW Asia**: Fernando Pimentel, how do you promote Brazilian textiles?

**Pimentel**: In 2001 ABIT, supported by Apex-Brasil [Brazilian Trade and Investment Promotion Agency] launched TexBrasil, the trademark that promotes Brazilian textile products abroad. In parallel with promoting Brazilian textile products in the world market, TexBrasil develops strategic programs for exportation, stimulating Brazilian entrepreneurs through its activities and courses to increase their exports. The export strategies developed by TexBrasil have now become a benchmark for Apex.

**TW Asia**: What are ABIT's activities for your domestic textile industry?

**Pimentel**: To achieve excellence within the textile sector,

ABIT develops special professional training programs and supports social and environmental programs, among other activities.

**TW Asia**: What do you want to achieve as executive director?

**Pimentel**: My job is to promote, organize and propose programs to increase awareness of the Brazilian textile industry. It is important to know that ABIT is backed by 50 leaders from all sectors of the textile industry. The motto of the forthcoming ITMF conference in São Paulo — "Compliance, Sustainability and Profitability" — matches perfectly our own ABIT philosophy. All small and mostly medium-sized member companies are called to work according to ethical, legal and sustainable standards.

## Second-largest Industry

Brazil's textile industry ranks second in importance behind food and beverage industry. Seventeen percent of Brazil's workforce are involved in the textile industry with 7 million working directly in the industry and 7 million working indirectly as subcontractors and suppliers.

**TW Asia**: Is Brazil basically a cotton-growing country?

**Pimentel**: Up to now, one can say so. Sixty percent of all textile products are made of cotton. However, man-made fibers are processed more and more in Brazil — basically because of Petrobras, one of the country's largest companies, producing domestic textile products. Therefore, man-made



巴西的纺织行业雇佣了该国17%的工人，有近700万工人直接从事这个行业，还有700-800万工人在分包商和供应商处间接为该行业服务。

**Brazil's textile industry employs 17 percent of its workers, including 7 million working directly in the industry and some 7 million to 8 million subcontractors and suppliers.**

糟糕。我们的市场增长了12%，产量也在提高，但是，2009年的进口也增长了60%。我们的货币非常稳定，竞争主要来自中国。2010年，我们的国内生产总值(GDP)预计将增长4%。

我们希望，最终所有的市场都一样，不仅仅是中国。国内消费快速增长，同时国内市场也开放。我们非常关心这一点，当然，我们渴望自由贸易，但是，请每个人都遵循同样的规则和同一尺度。

《亚洲纺织世界》：这是一个很大的挑战。

**Pimentel:** 是的，而且这是一个新的挑战。目前我们出口的技术用纺织品及非织造布已经超过了服装。巴西不再是一个廉价商品市场。我们每年需要200万个新工作岗位。教育的标准在各个层次都在提高。下一个五年内石油和天然气行业的投资将达到2500亿美元。每年，我们投入3000亿美元到国内基础设施

建设中。目前，我们的人均纺织品消费是11-12公斤。伴随5%的GDP年增长率，下一个五年内我们的纺织品消费将翻一番。

《亚洲纺织世界》：但是您不能仅仅依靠国内市场。

**Pimentel:** 当然不是。像上面所提到的，如果危机再次出现，巴西市场将受到来自国外的巨大压力。

### 市场定位

《亚洲纺织世界》：巴西以及贵国纺织行业的主要优势是什么？

**Pimentel:** 从原料到最终产品，我们覆盖了所有的生产环节。我们的机械设备和技术日新月异。我们的国内市场有巨大的发展潜力。我们的人口以2%的速度增长——每年增加200万人。纺织行业是一个正在崛起的朝阳产业。

《亚洲纺织世界》：企业家为什么要投资巴西的纺织产业？

fibers are gaining importance, also for the export industry.

### Market Questions

**TW Asia:** How do you see the current market situation? Was Brazil hurt too by the financial crisis?

**Pimentel:** Thanks to our big domestic market, it was not so bad. That market is growing by 12 percent, and production is rising, but also, imports grew by 60 percent in 2009. We have a strong currency and competition mainly from China. For 2010, our gross domestic product (GDP) is expected to grow by 4 percent.

We hope that finally, all markets have the same conditions, not only China. Domestic consumption is soaring, and the domestic market is open. We are very concerned and, of course, we want free trade, but the same rules and yardsticks for everybody, please.

**TW Asia:** This is quite a big challenge.

**Pimentel:** 与其它国家相比我们有很多优势: 稳定的经济, 大量的各种不同的原材料, 庞大的劳动力, 可靠的工作环境。巴西是一个民主国家, 还是没有民族问题的多民族国家; 我们有统一的语言, 但没有冲突; 对每个人都有清晰的法律条文。所有这些构成持一个有利的投资环境。

## ITMF年会

将2010 ITMF年会放到巴西举办是ITMF和ABIT的共同意愿, 这将向全世界展示巴西的纺织行业对这个国家的重要性。

《亚洲纺织世界》: 您对这次会议的期望是什么?

**Pimentel:** 一方面, 对于我们国家来说这是向当地政府展示纺织行业的重要性的一个关键时刻。另一方面, 这是一个获得承认的平台。然而, 我们没有对产能过剩的生产敞开大门, 但是欢迎真正的长期投资。我想要对这个世界说的是: 我们在此敞开怀抱, 但是希望我们能够在平等的社会和环境标准下一起工作。

《亚洲纺织世界》: 您希望巴西纺织行业从这次会议中获得什么?

**Pimentel:** 观众前来, 能够将巴西的生产优势展示给他们。我们在年轻人中间做了很多推广工作, 向他们展示纺织行业的吸引力。这需要通过一种巴西的生活方式来完成, 我们欢迎大家来参加2010年10月在圣保罗举办的ITMF年会。 **TW Asia**

**Pimentel:** Yes, and it is a new challenge. Already, we export more technical textiles and nonwovens than apparel. Brazil is not a cheap market anymore. We need 2 million new jobs every year. The standard of education is rising on all levels. Oil and gas industry investments in the next five years will be \$250 billion. For the domestic infrastructure, \$300 billion is spent every year. At the moment, textiles consumption per capita is some 11 to 12 kilograms (kg). With an annual GDP growth of 5 percent, we can double consumption in the next five years.

**TW Asia:** But you cannot only depend on the domestic market.

**Pimentel:** Of course not. As mentioned above, if problems occur again, the Brazilian market will be under great pressure from foreign countries.

## Market Position

**TW Asia:** What are the main advantages for Brazil and its textile industry?

**Pimentel:** From raw material up to the finished product, we have all production stages. Our machinery equipment and technology are up to date. Our domestic market has big development potential. The population is growing by 2 percent — 2 million people — every year. The textile industry is a growing, positive sector.

**TW Asia:** Why should an entrepreneur invest in the Brazilian textile industry?

**Pimentel:** We have a lot of advantages compared to other countries: a stable economy, a lot of

different raw materials available, labor peace, a serious workforce. Brazil is a democracy and a multi-ethnic society with no problems, and one single language with no conflicts and clear rules for everybody. All this supports a favorable investment environment.

## ITMF Conference

The idea to bring the 2010 ITMF Annual Conference to Brazil was developed by ITMF and ABIT to show the world how important the Brazilian textile industry is for the country as such.

**TW Asia:** What do you expect from the congress?

**Pimentel:** On the one hand, this is a very important moment for the country to show the local authorities the importance of the textile industry. On the other hand, it is a platform to be accepted. However, we don't have an open door only for overcapacity production, but also for true long-time investments. I can only say to the world: Here we are with open arms, but let's work together with equal social and environmental standards.

**TW Asia:** And what do you expect from the congress for Brazil's textile industry?

**Pimentel:** We expect many visitors to demonstrate the advantages of a production site in Brazil. We do a lot of promotion among young people, to show how attractive the textile industry is. This has to be done in a Brazilian way of life, and I welcome everyone to join us in October 2010 in São Paulo for the ITMF conference. **TW Asia**