

ITMF's Annual Conference – Meeting of the Global Textile Value Chain 2012 Hanoi/Vietnam – in Cooperation with VINATEX



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国际纺织制造商联合会 (ITMF) 年会—全球纺织业价值链的盛会 2012年 越南河内—与越南纺织服装集团 (VINATEX) 合作办展

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The International Textile Manufacturers Federation, generally better known under its acronym, ITMF, is a private sector international organization for the world's textile industry with a long tradition dating back to its foundation in 1904. ITMF sees itself as the world's leading forum for discussion of matters relevant to the global textile value chain – from fibres to retail – and to all allied industries including the textile machinery and the chemical industries. As a non-profit and non-governmental organization, ITMF serves as an agency for the collection of information on textile manufacturing developments around the world. Furthermore, it also provides a neutral meeting forum for the textile and allied industries for the exchange of information and for discussions on all matters affecting the global textile value chain. Finally, ITMF fulfils the function of a liaison agent between the textile industries and governments and intergovernmental organizations as well as with all other international organizations representing other sectors interested in the textile industry.

It is in this context that the Federation is organizing in cooperation with the Vietnam National Textile & Garment Group (VINATEX) the ITMF Annual Conference 2012 in Hanoi/Vietnam. It is the first time that the ITMF Annual Conference will be held in South East Asia. While other countries in the region like Indonesia, Malaysia or Thailand have already been integrated in the global textile value chain for several decades, this is not the case for Vietnam. It is only in the past two decades that Vietnam has appeared as an important and growing producer, importer and exporter of textiles and apparel. Vietnam's integration in the global economy was boosted by its admission to the World Trade Organization (WTO) in the year 2007.

The main objective of both government and central bank in recent years was to reduce the inflation rate to an acceptable level below 10%. This would enable them to lower interest rates and to stimulate growth. Both fiscal and monetary policy helped to curb inflation from around 18% in 2011 to a forecasted 8% in 2012. Real GDP growth since 2007 reached between 5.3 and 8.5% and is forecasted at 5.7% in 2012. The relative strong growth in Vietnam is supported by private consumption. Net retail sales grew in the 1st half of 2012 by an average of 5-6%, which was lower than in 2009-2011. Another important growth factor is Vietnam's export industry. The country's exports continue to soar and are shifting more and more from a commodity-driven export model (e.g. oil, rice, rubber, coffee or coal) to a more balanced export-model with a higher share of capital- and labour-intensive manufacturing items such as cell phones, cameras, computers, textiles, garments and footwear.

国际纺织制造商联合会，缩写ITMF，于1904年成立，是一家历史悠久、私营性质的国际纺织业组织。ITMF是讨论全球纺织业课题的重要论坛，整个纺织业价值链，包括纤维、纺织品零售、纺织机械与化学工业，都是ITMF讨论的议题。作为一家非营利性的非政府组织，ITMF搜集全球纺织业发展动态，召开纺织业及相关产业会议，为行业机构提供中立平台，交流信息、讨论全球纺织业发展课题。ITMF也是纺织业与各级政府机构、国际组织之间的联络平台，代表整个纺织业的利益。

在上述背景下，ITMF与越南纺织服装集团 (VINATEX) 合作，在越南河内召开“2012年度ITMF年会”。这是ITMF年会首次在东南亚国家召开。其他东南亚国家，如印尼、马来西亚和泰国，早在数十年前就已融入全球纺织品产业链，但越南的情况却并非如此。越南的纺织业发展在20年前才刚刚起步，现在逐步成为重要的纺织品与服装制造地及进出口地。2007年，越南加入世贸组织 (WTO)，在全球经济中的地位凸显。

近年来，政府与中央银行的主要目标是：将通胀率降低到10%以下，以降低利率、刺激经济发展。政府推出财政与货币政策，将通胀率从2011年的18%，降低到2012年的8%。自2007年以来，全国GDP增长率在5.3-8.5%之间，预计2012年的GDP增长率为5.7%。个人消费是带动越南经济发展的主要因素。2012年上半年，全国的净零售收入增长了5-6%，低于2009-2011年的水平。越南的出口业也带动了经济增长。出口模式由商品驱动（如原油、大米、橡胶、咖啡、煤炭）转向平衡型出口模式，资金密集型与劳动密集型产业，如手机、相机、电脑、纺织品、服装与鞋类产业占据很高比例。

在过去十年间，越南的服装业取得蓬勃发展，服装出口从2000年的18亿美元增长到2010年的108亿美元，增幅达500%。纺织品出口的增长更加显著，2010年的出口价值为27亿美元，

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Short Staple Spindles
2002-2011年-短绒棉运输量
Vietnam/越南



Especially Vietnam's garment industry has seen an enormous growth in the past decade with exports soaring from USD 1.8 billion in 2000 to USD 10.8 billion in 2010, an increase of 500%. The export growth of textiles was even more impressive, though from a lower level, reaching USD 2.7 billion in 2010 as compared to USD 0.3 billion in 2000. This represents an increase of 800%. The growing exports of textiles were the result of considerable investments in the primary textile industry.

According to data of ITMF's "International Textile Machinery Shipment Statistics" the average shipments of new short-staple ring-spindles to Vietnam between 2002 and 2011 amounted to approx. 235,000 spindles per year.

In the same time-span shipments of open-end rotors reached on average 3,600 rotors per year. The graph shows that the global economic and financial crisis of 2007/08 had a negative effect on investments in 2009, whereas investments picked up again in 2010 and 2011.

Vietnam's textile industry not only invested in new spinning but also in new yarn-processing technologies. In 2002, only around 100 new shuttle-less looms were installed. This number jumped to almost 600 in 2008. On average shipments of shuttle-less looms to Vietnam between 2002 and 2011 averaged around 670 per year. It is interesting to note that also during the years following the crisis, investments in new shuttle-less looms did not plummet significantly.

Investments in circular knitting machines showed a somewhat different pattern. The number of annual shipments of large circular knitting machines had already risen strongly between 2002 and 2005 from approx. 150 to approx. 350 per year. This might be explained by the fact that investments in circular knitting machines are significantly smaller in comparison to investments in new shuttle-less looms. From 2006 until 2008 investments in this segment fell to approximately 200 new circular knitting machines per year but picked up again in 2009 and 2011, reaching between 250 and 300.

Shipments OE Rotors 2002 - 2011
2002-2011年-转杯纺纱运输量
Vietnam/越南



而在2000年，出口价值仅为3亿美元，增幅达800%。政府加大对纺织业的投资，进一步推动了纺织品出口的增长。

据ITMF“国际纺织机械运输量统计”表明，2002-2011年间，越南的新型短纤维锭纺纱机运输量达每年235000台。

在同一时期，开端式纺纱机的运输量达每年3600台。如下图所示，2007-2008年的全球金融危机对2009年的投资情况产生负面影响，但在2010-2011年间，投资量再次上升。

越南不仅加大对新型纺纱机的投资，还对新型纺纱技术加大投资。2002年，全国只安装了100台左右新型无梭织机。到2008年，无梭织机的数量增加到600台。2002-2011年间，越南的无梭织机运输量平均为每年670台。在金融危机过后，新型无梭织机的总投资量并未显著下滑。

圆形针织机的投资情况略有不同。在2002-2005年间，大型圆形针织机的年均运输量已经出现强劲增长，从每年的150台增加到350台。这是因为同新型无梭织机相比，圆形针织机的投资量要小得多。2006-2008年间，圆形针织机的投资量下降到每年200台左右，但在2009-2011年间，这一数值再次上升，在250-300台之间。

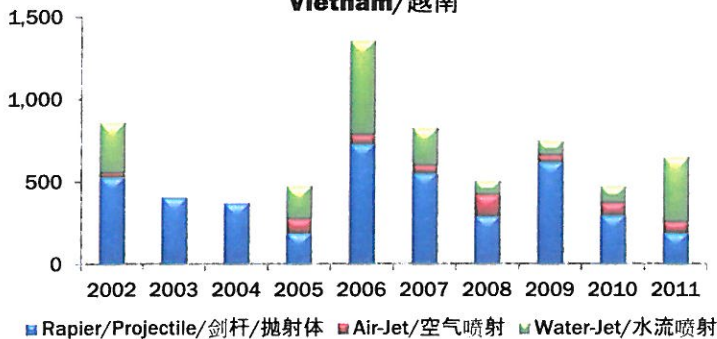
在2009年之前，电子针织横机的投资量并不多，数量还不到10台，但在2010-2011年间，电子针织横机的投资量突然上升到每年100台左右。

ITMF每年都发布全球新纺织机械的运输量，为分析人士提供重要指标，用于分析纺织业的变化与发展趋势。如今，部分国家不断加大纺织机械的进口量，届时，这些国家将成为重要的纺织品生产国。

除新纺织机械的运输量之外，ITMF还发布全球9个国家的生产成本统计数据，以及世界各国安装的纺织机数量与纺织品产量。

ITMF的作用不仅仅是发布统计数据。ITMF成员每年召开一次年会，共同讨论行业的短期与长期发展趋势。ITMF年会通常在某个成员国举行，由一个

Shipments Shuttleless Looms 2002 - 2011
2002 - 2011年-无梭织机运输量
Vietnam/越南



In the segment of electronic, flat knitting machines investments were negligible until 2009 when not more than 10 machines were installed. In 2010 and 2011 investments suddenly jumped to around 100 machines per year.

ITMF's annual publication on shipments of new textile machinery shipped around the world is certainly an important indicator for anyone interested in analysing changes and developments in the textile industry. Today's shipments of textile machinery to a certain country are very likely tomorrow's production in that country.

In addition to data on shipments of new textile machinery, ITMF publishes data on production costs in 9 different countries around the world, on installed spinning and weaving capacities in literally every relevant textile country worldwide and on textile production.

Nevertheless, the role of ITMF is not limited to the compilation and publication of statistical information. The members of the Federation value very much the opportunity to convene once a year, in order to meet and discuss both short-term as well as long-term developments in the industry. The ITMF Annual Conference is traditionally held in one of the Federation's member countries and hosted by one or more of its members. As mentioned above this year's Annual Conference will be held in Hanoi/Vietnam and will be hosted by the Vietnam Textile and Garment Group (VINATEX). This offers the Vietnamese textile industry a chance to showcase its achievements and to promote further cooperation with, and investments from, business partners around the world. The principle of rotating conference venues has the purpose of highlighting the textile industries in all regions of the world.

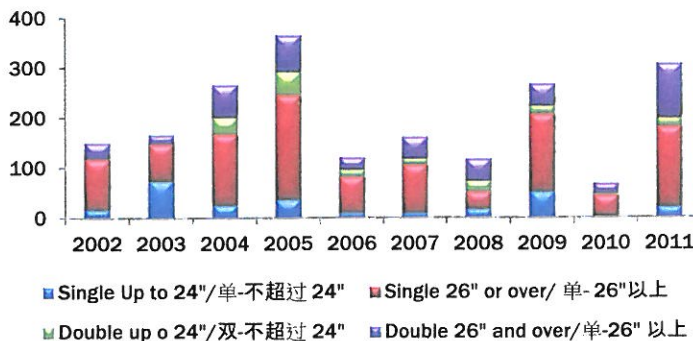
The value of an international platform for the global textile industry such as the ITMF is the possibility to meet and to discuss with colleagues and experts the challenges and opportunities from around the world in a relaxed and productive atmosphere. Since participants of ITMF Annual Conferences comprise not only representatives of the textile industry but of the entire textile value chain from fibre to retail, the conference provides the unique opportunity to have a comprehensive and hence a strategic view on the entire industry.

A look at the programmes of ITMF Annual Conferences shows the objective of offering a wide range of topics relevant to the textile industry. A conference for a global industry needs to look at macro-economic developments, since global economic conditions have an enormous impact on the global textile industry. An analysis of the raw material situation of cotton and man-made fibers is a traditional part of the conference covered in the "Fibre Session". In the other general sessions, the conference discusses industry topics that are relevant for the nearby and more distant future. In Vietnam there will be a general session on "How to Do Business in Times of Volatility and Uncertainty". Another will discuss "From Fibre to Retail – How to Handle the Supply Chain". A further session of the conference will examine the consumer side with a discussion on "Old and New Retail

Shipments Circular Knitting Machines 2002 - 2011

2002-2011年-圆形针织机运输量

Vietnam/越南



或多个成员国共同举办。今年的年会将在越南河内召开，由越南纺织服装集团 (VINATEX) 主办。在本届年会上，越南将有机会展示纺织业取得的成就，并与世界各国加强合作、吸引外资。通过轮值主办的形式，各成员国都有机会展示其纺织业的发展成就。

ITMF为全球纺织业提供了一个交流平台，各企业与专家将出席会议，在融洽的气氛中，就如何应对行业的挑战和机遇，共同开展讨论。ITMF年会不仅吸引着全球纺织行业代表的参与，还吸引了纺织业价值链中的各个参与者，包括纺织纤维与零售企业等的参与。ITMF年会协助与会者，以一种综合型、战略型的眼光看待行业发展。

Markets”。Since a strong, growing segment is that of technical textiles and nonwovens, one general session will discuss developments in these areas (*“Technical Textiles and Nonwovens”*). Finally, the Hanoi conference will of course also look at the Vietnamese textile industry (*“Vietnam’s Textile and Apparel Industry on the Rise”*).

Next to these general sessions will be meetings of sub-committees like the Spinners Committee, the Joint Cotton Committee, the Home Textiles Producers Committee and the Fibre /Technical Textiles Committee. Another important part of ITMF Annual Conferences is the opportunity to meet old friends and to make new ones on various occasions. This opens the possibility to discuss informally matters of mutual interest. The ITMF Annual Conference shows that in times of internet and mobile phones, personal contacts and meetings are important and appreciated as opportunities for sharing information and experiences and for strengthening and expanding one’s international network.

在ITMF年会上，与会者将针对纺织行业的发展，开展广泛讨论。作为一次全球性的会议，ITMF年会将关注宏观经济发展，因为全球经济形势对纺织业具有重大影响。在“纤维讨论环节”中，与会者将对棉花与人造纤维的发展形势进行分析，这是ITMF年会必不可少的一项内容。在另一项常规会议上，与会者将对纺织行业的话题开展讨论，讨论行业在未来的发展趋势。在越南河内的年会上，与会者将讨论“在波动、不确定的市场环境下，怎样开展商务活动”这一话题，以及“从纤维到零售——怎样处理供应链”的话题。大会还将从消费者角度，讨论“新旧零售市场的对比”这一话题。由于纺织技术与非编织类产品取得强劲增长，大会还将讨论上述领域的发展（“纺织技术与非编织类产品”）。当然，河内年会将讨论越南纺织业的发展趋势（“越南的纺织与服装业发展迅猛”）。

在常规会议结束后，纺织厂协会、棉花产业联合委员会、国内纺织品制造商委员会、纺织品纤维/技术委员会也将举行分组会议。ITMF年会在促进老会员交流的同时，还积极吸纳新会员的加入，在互惠互利的前提下，就多项议题开展非正式讨论。在互联网与移动电话的时代，人与人之间的交流依然很重要，ITMF年会促进纺织行业间的交流，鼓励信息共享、经验交流，以进一步加强、拓展企业的国际化网络。