

# **Teamwork for Shared Value Openness for A Shared Future**

**团结创造价值  
开放成就未来**

Sun Ruizhe, President of ITMF/CNTAC  
孙瑞哲 国际纺联主席 / 中国纺织工业联合会会长  
2023.6.8

Today, our world, our times, and history are changing in ways like never before.

当前，世界之变、时代之变、历史之变正以前所未有的方式展开。

scientific and technological revolution  
科技革命

industrial transformation  
产业变革

once-in-a-  
century  
pandemic  
世纪疫情

a backlash  
against  
globalization  
逆全球化思潮

unilateralism  
单边主义

protectionism  
保护主义

conflicts and  
disturbances  
冲突和动荡

This is an era rife with challenges. It is also one brimming with hope. Textiles and clothing are vital to the national economy and people's livelihood. To sustain development and prosperity of the world's textile industry, meets the interests of us all.

我们所处的是一个充满挑战的时代，也是一个充满希望的时代。纺织服装关系国计民生，维护世界纺织业的发展和繁荣符合我们的共同利益。

Stay firmly committed to  
openness and inclusiveness

坚持开放包容

- We should continue to respect and appreciate diversity and difference among our industry.
- 欣赏行业的多样性，尊重行业的差异性
- Further liberalize and facilitate global trade and investment, oppose trade protectionism and decoupling.
- 促进全球贸易投资自由化便利化，反对贸易保护主义和“脱钩断链”
- Keep global industrial and supply chains stable and smooth.
- 确保全球产业链供应链稳定畅通



•We ought to pursue the dual mission, which addresses profitability and sustainability together.

•追求盈利能力和可持续性双重产业价值

•Securing low- or zero-carbon raw materials, embracing greener product designs.

•选用低碳或零碳原材料，更环保的产品设计

•To harness intelligent manufacturing and digital technologies, to transform their operations and business models in a responsible way.

•扩大智能制造、利用数字技术，以负责任的方式改进运营和商业模式

Stay firmly committed to innovative  
development

坚持创新发展

Stay firmly committed to  
win-win cooperation

坚持合作共赢

•The commitment of China's textile industry to close ties with EU and US, in the economic and trade field, remains unchanged.

•中国纺织行业在经贸领域与欧盟、美国开展密切合作的初心不变。

•Making good use of the globally-oriented networks and high-standard platforms for the industry, such as ITMA and Intertextile, to strengthen cooperation and share the latest achievements and best practice.

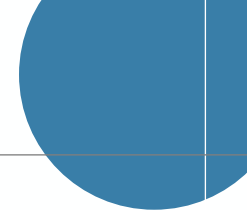
•用好面向全球的高标准的行业网络 and 平台，如欧洲纺织机械展和国际面料及辅料展览会，分享最新成果和最佳实践。

Partnerships based on mutual trust, inclusiveness, cooperations and mutual benefit: This is what keeps our big textile family together.

互信、包容、合作、共赢的伙伴关系，是世界纺织大家庭的精神纽带。

# Status Quo and Outlook of China's Textile & Apparel Industry

## 中国纺织行业的现状与展望



- »» I. Steady Progress Despite Pressure  
一、中国纺织工业承压前行
- »» II. Globalization for a Stable Global Supply Chain  
二、融入全球，保障全球供应链平稳运行
- »» III. Chinese Textile Machinery - A Strong Support for the World T & A Industry  
三、中国纺织机械行业成为世界纺织工业的有力支撑
- »» IV. China's Practices of Building a Modern Textile Industrial System  
四、打造纺织现代化产业体系的中国实践

# I. Steady Progress Despite Pressure

## 一、中国纺织工业承压前行

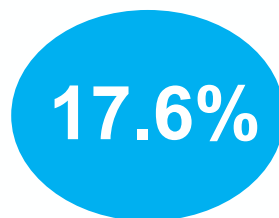
- ◆ In 2022, China's textile and apparel industry rose to the challenges and achieved steady progress with effective upgrade in quality and appropriate expansion in quantity.
- ◆ 2022年，中国纺织工业迎难而上，实现了质的有效提升和量的合理增长。

In 2022, China's textile and apparel enterprises above a designated size:  
2022年，纺织行业规模以上企业：

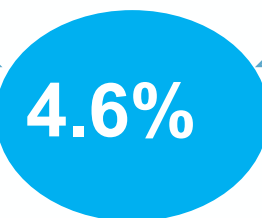
the value-added industrial output  
工业增加值



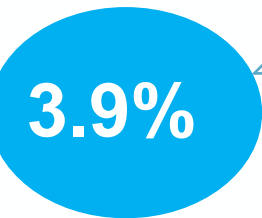
textile and apparel industry  
纺织行业



filament yarn  
长丝织造



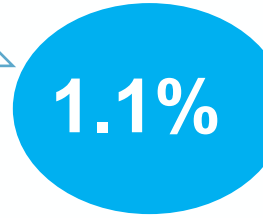
wool textiles  
毛纺织



technical textiles  
产业用纺织品



bast fiber textiles  
麻纺织



man-made fibers  
化纤



apparel sector  
服装业



The capacity utilization of  
textile sectors  
纺织业产能利用率

77.2%

The capacity utilization of  
man-made fiber sectors  
化纤业产能利用率

82.3%

- Further weigh on consumption
- 消费承压

Year-on-year drop in the  
retail sales of garments,  
shoes, hats, and knitwear  
全国限额以上服装、鞋帽、针  
纺织品类商品零售额同比减少



6.5%

Year-on-year growth in  
the retail sales of online  
wear products  
网上穿类商品零售额同比



3.5%

# I. Steady Progress Despite Pressure

## 一、中国纺织工业承压前行

- Great pressure for industry economic benefits
- 质效承受较大压力

In 2022, China's textile and apparel enterprises above a designated size:

2022年，纺织行业规模以上企业：

China's textile and apparel industry  
纺织工业

CNY 5.2 trillion  
52000亿元

↓ 0.9%

the total revenue 营业收入

CNY 206.7 billion  
2067 亿元

↓ 24.8%

the total profit 利润总额

cotton spinning  
棉纺纱加工

↓ 3.37%

the total revenue  
营业收入

↓ 40.49%

the total profit  
利润总额

cotton weaving  
棉织造加工

↓ 2.61%

the total revenue  
营业收入

↓ 8.95%

the total profit  
利润总额

- Investment grew steadily
- 投资实现平稳增长

Year-on-year growth in fixed-asset investment

固定资产投资完成额同比增长



4.7%

Textile sector  
纺织业



21.4%

Chemical fiber  
sector

化纤业



25.3%

Apparel  
sector  
服装业

# I. Steady Progress Despite Pressure

## 一、中国纺织工业承压前行

◆ Starting from this year, we see improvement in both slack demand and supply-side constraint.

◆ 今年以来，需求和供给受抑制的情况得到缓解。

- smooth production in general
- 生产总体平稳

the value-added industrial output  
工业增加值

3.3% ↓

Chemical fiber sector  
化纤业

3% ↑

Textile sector  
纺织业

3.2% ↓

filament, wool textile,  
printing and dyeing sectors  
achieved growth.

长丝织造 毛纺织 染整工业增加值

- a gradual pick-up in consumer spending
- 消费逐步回暖

- Year-on-year growth in the retail sales of garments, shoes, hats, and knitwear
- 全国限额以上服装、鞋帽、针纺织品类商品零售额同比

13.4% ↑

4.4 percentage points higher over the first quarter and  
19.4 percentage points higher over the corresponding  
period last year

较一季度和上年同期加快4.4、19.4个百分点

- Year-on-year growth in the retail sales of online wear products
- 网上穿类商品零售额同比

13.5% ↑

4.9 percentage points higher over the first quarter and  
15.2 percentage points higher over the corresponding  
period last year.

较一季度和上年同期加快4.9、15.2个百分点

- pressure on industry economic benefits
- 效益改善承压

CNY 1.43trillion  
14271.3亿元

the total revenue  
营业收入

5.6% ↓

CNY 33.85 billion  
338.5亿元

the total profit  
利润总额

31% ↓

Wool textile ,silk and home  
textile sectors achieved growth  
in economic benefits.

毛纺、丝绸、家纺行业的效益



# I. Steady Progress Despite Pressure

## 一、中国纺织工业承压前行

◆ We focus on key innovation to enhance industrial basic capabilities.

◆ 聚焦关键创新，提升基础能力



- The industry picks up the pace in manufacturing innovation featuring intelligent and green manufacturing.
- 加快推动以智能制造、绿色制造为代表的制造创新

Jingwei Textile Machinery has developed a solution for the full-process intelligent spinning with 100 % traceability of product quality, an over-70% labor reduction per 10 thousand spindles and a 24.4% increase in productivity.  
经纬纺机开发了全流程智能化纺纱成套解决方案，达到了产品质量100%可追溯，万锭用工降低70%以上，生产效率提高24.4%的效果。



- The industry picks up the pace in material innovation featuring high-performance and biological materials.
- 加快推动以高性能纤维、生物材料为代表的材料创新

Application of carbon fibers in various fields such as aerospace, wind power generation and weight reduction of automobiles. The T800 high-strength carbon composites are used for China' s self-developed passenger aircraft C919.  
以碳纤维为例，在航空航天、风力发电、汽车轻量化等领域的应用不断深化，中国首款大型客机C919中就使用了T800级高强碳纤维复合材料。



- The industry picks up the pace in product innovation featuring smart and functional textiles
- 加快推动以智能纺织品、功能性纺织品为代表的产品创新

Color and shape changeable clothes  
变色变形服装  
wearable textiles  
可穿戴纺织品



Transportation  
交通运输



Civil engineering and architecture  
土工建筑





# I. Steady Progress Despite Pressure

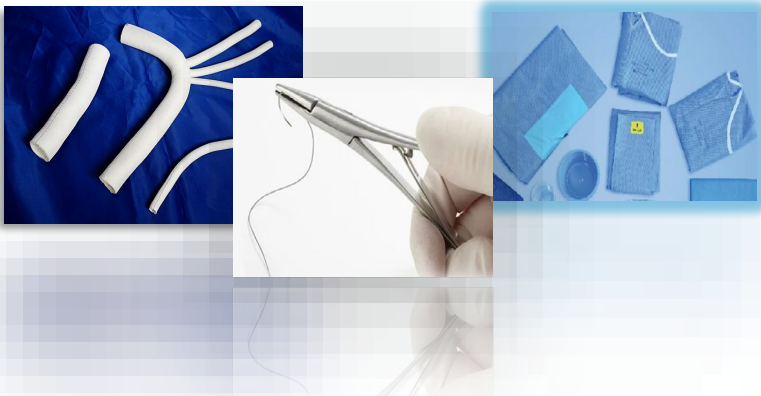
## 一、中国纺织工业承压前行

◆ We focus on integrated development to expand industrial space.

◆ 聚焦融合发展，延展产业空间

From the bio-economy represented by synthetic biology, the One -Health represented by medical textiles to the marine economy represented by development of chitin fibers, the textile industry redefines its boundary and reshapes its future in integration and innovation.

从以合成生物学为代表的生物经济，以医用纺织品为代表的大健康领域，到以甲壳素纤维开发为代表的海洋经济，纺织行业在融合创新中重新定义产业边界，塑造未来产业。



LUOLAI Home Textile, a Chinese home textile brand leader, starts its product innovation from cotton seeds. The LUOLAI NO. 1 Seed was carried into space for breeding experiment. The company has also achieved success in areas such as thermal technics and sleep ergonomics.

罗莱家纺从棉花种子开始系统化推动产品创新，对中棉罗莱1号种子进行太空育种，企业在保暖工艺、睡眠人体工学等多领域也颇有建树。

Yuyue, a home-textile company, replaces human aorta with artificial blood vessels made of micro-structure materials. 愉悦家纺成功用微米级材料编织出可置换人体主动脉人造血管。

The Qingdao Yuanhaixinke company has achieved success in application of seaweed-fiber products in fields such as flame-retardant engineering and biomedicine.

青岛源海新科成功实现海藻纤维产品在阻燃工程、生物医学等领域的应用。

# I. Steady Progress Despite Pressure

## 一、中国纺织工业承压前行

- ◆ We focus on intelligent transformation to renew development patterns.
- ◆ 聚焦智能转型，更新发展范式

Digital transformation is encouraged to cover the full process, full scene, full contact and full life cycle. Progress has been made in the in-depth development of the industrial internet, intelligent manufacturing and service-oriented manufacturing.

行业推进全流程、全场景、全触点、全生命周期的数字化转型，工业互联网、智能制造、服务型制造深入发展。

- In 2022, the number of AI patents in China topped the world list.
- 2022年，中国人工智能专利申请量居世界首位。

>CNY 500  
billion

>5000 亿元人民币

The scale of China's core industries in the areas of computer vision, natural language processing and ASR

中国在计算机视觉、自然语言处理和语音识别等领域的核心产业规模

Source: Ministry of Science and Technology of the People's Republic of China  
数据来源：中华人民共和国科学技术部。

The DPI SPACE, an AI-driven design platform developed by China Textile Information Center can help enterprises improve their ability to innovate.

中国纺织信息中心开发的DPI SPACE人工智能图案设计平台以数字驱动设计和趋势研究，帮助企业提升创新能力。

With the online and offline technology integration in Hongdou Experience Center, a personalized customization can be achieved through 30 seconds of scanning, 1-minute customization, 5-minute auto-sampling and ready-made clothing delivered home within 7 days.

红豆股份体验中心通过线上线下融合，实现30秒智能扫描、1分钟个性定制、5分钟自动出版，7天成衣配送到家的个性化定制。

In fashion design, the Style3D company creates hot-sale clothing by using AIGC technology to generate a 3D design image by imputing a flat image and basic language information.

在时尚设计领域，Style3D公司结合AIGC技术，通过导入平面图、基本语言信息，打造爆款服装。



## II. Globalization for a Stable Global Supply Chain

### 二、融入全球，保障全球供应链平稳运行

#### • In 2022:

Total Exports of China's Textile and Apparel Products and year-on-year growth

中国纺织品服装出口总额及同比增长

**US\$ 340.95 billion**

3409.5亿美元

↑ 2.5%

textiles  
纺织品

US\$ 156.84 billion

1568.4亿美元

↑ 1.4%

apparel  
服装

US\$ 184.11 billion

1841.1亿美元

↑ 3.4%

- Textile fabrics and industry chain support products including man-made fibers witnessed a major growth.
- 纺织面料、化纤等产业链配套产品是重要增长点。

chemical fibers  
化纤

**5.65 million tons**

565.45万吨

↑ 8.76%  
year-on-year increase  
同比增加

technical textiles  
产业用纺织品

**US\$ 44.15 billion**

441.5亿美元

↑ 17.3%  
annual growth rate since  
2019  
自2019年以来年均增长率

#### • From January to April 2023,

#### • 2023年1-4月:

Total Exports of China's Textile and Apparel Products and year-on-year drop

中国纺织品服装出口总额及同比下降

**US\$ 92.89 billion**

928.9亿美元

↓ 2.9%

textiles  
纺织品

US\$ 44.81 billion

448.1亿美元

↓ 8%

apparel  
服装

US\$ 48.08 billion

480.8亿美元

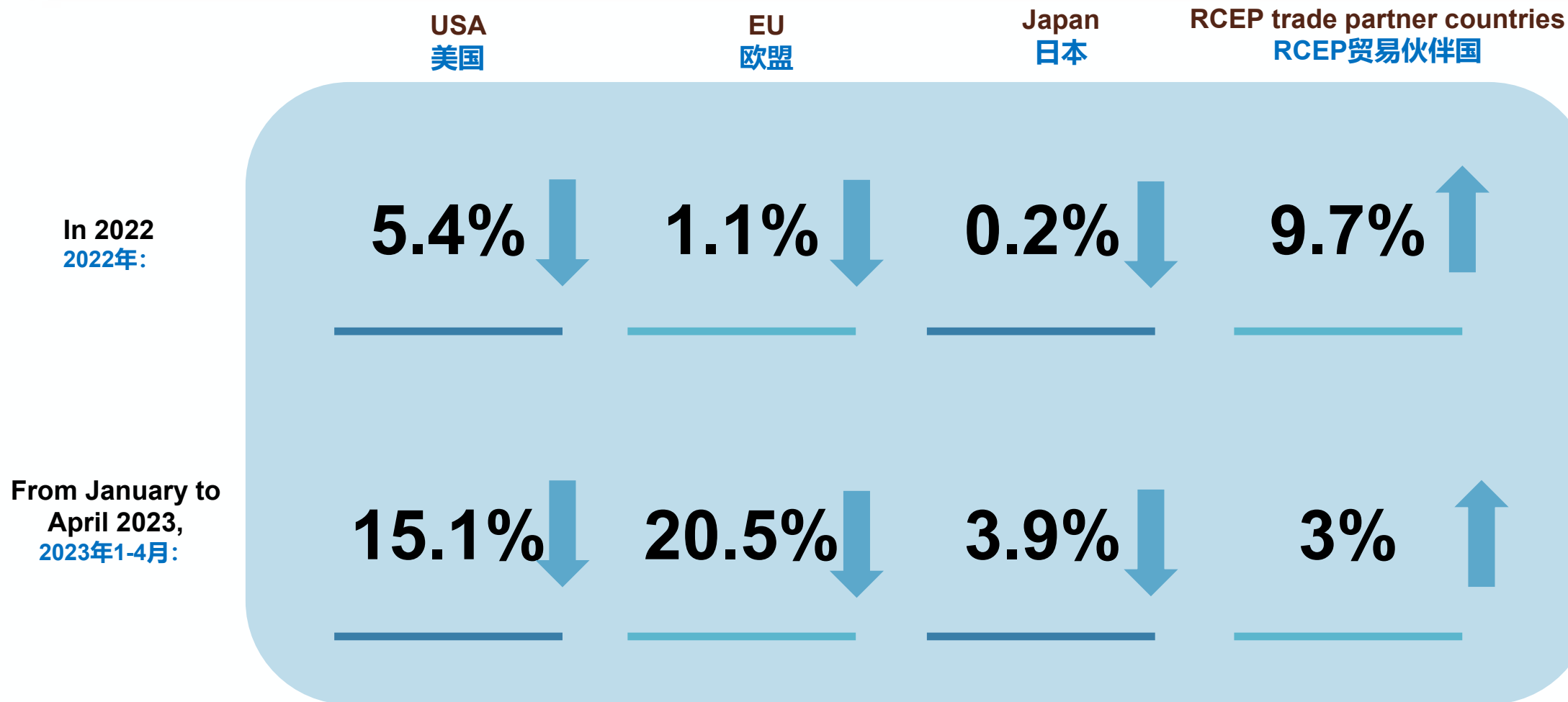
↑ 2.5%

- the overall economic and trade environment is still complicated. The big problem is underconsumption.
- 整体经贸环境依然复杂，市场消费不足的问题尤为突出。

## II. Globalization for a Stable Global Supply Chain

### 二、融入全球，保障全球供应链平稳运行

- ◆ The export markets for China's textile and apparel products are undergoing structural changes.
- ◆ 中国纺织服装出口市场结构正在发生改变。





## II. Globalization for a Stable Global Supply Chain

### 二、融入全球，保障全球供应链平稳运行

◆ One major reason for such structural changes is that some countries are politicizing economic and trade issues.

◆ 结构调整的一个重要原因是一些国家将经贸问题政治化。

**36.6%**

In 2018

**24.7%**

In 2022

the share of China's textile and apparel products  
in the US market

中国纺织品服装在美国市场进口份额

- The formally effective US Act on Xinjiang (UFLPA) caused an impact on the exports of China's cotton textile and apparel products.
- 特别是所谓“涉疆法案”的正式生效对中国棉制纺织品服装出口造成冲击。

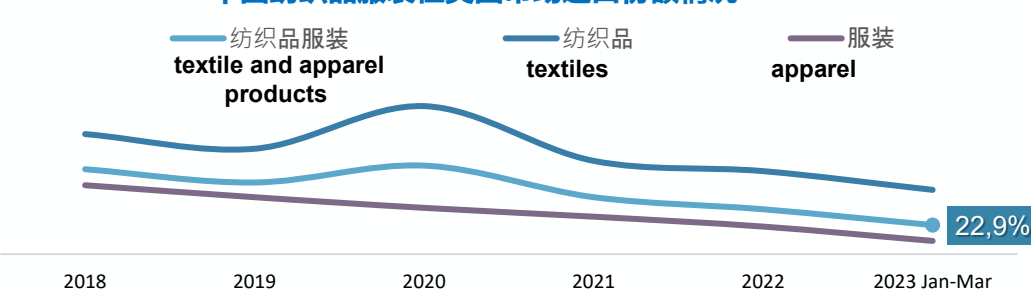
**3.6%**

Year-on-year drop in the exports of China's cotton  
textile and apparel products, 2022

2022年中国棉制纺织品服装出口同比减少

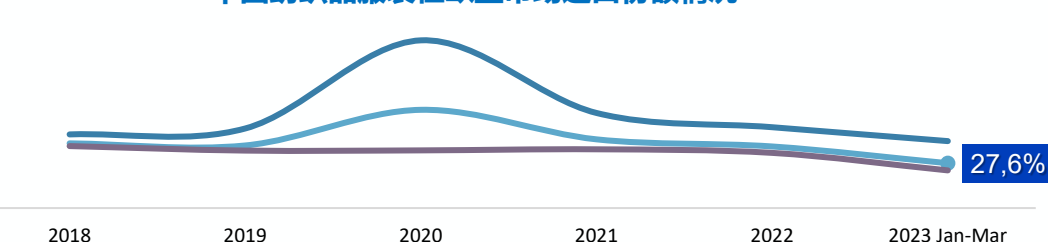
the share of China's textile and apparel products in the US market

中国纺织品服装在美国市场进口份额情况



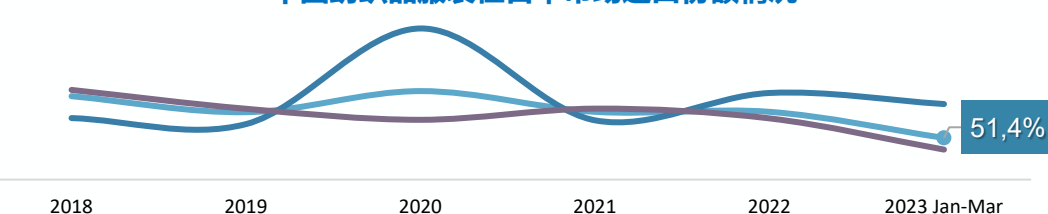
the share of China's textile and apparel products in the EU market

中国纺织品服装在欧盟市场进口份额情况



the share of China's textile and apparel products in the Japan market

中国纺织品服装在日本市场进口份额情况





## II. Globalization for a Stable Global Supply Chain

### 二、融入全球，保障全球供应链平稳运行



**Economic prosperity and stability rely on openness and cooperation. A global supply chain has evolved from the base of the market rule and enterprise choice.**

**经济的繁荣与稳定受益于开放与合作，全球供应链的形成和发展是市场规律和企业选择的结果。**



**The value of supply chain comes from cooperation. The so-called de-risking is in fact creating risks. The source of innovation comes from openness. Creating closed and exclusive clubs is in fact stifling innovation.**

**供应链的价值来自协同，当前所谓的“去风险”事实上是在创造风险；创新的活力来自开放，搞封闭化、圈子化，恰恰是在扼杀创新。**



**Exclusion and differences only result in missed opportunities, risks and disorders. We need to have a clear understanding of it and make reasonable choices.**

**排他和制造分歧，只会失去机遇、形成风险、造成混乱。我们需要对此有清醒认识和理性选择。**

### III. China's Textile Machinery Industry - a Strong Support for the World Textile and Apparel Industry

#### 三、中国纺织机械行业成为世界纺织工业的有力支撑

Textile machinery is the backbone of industrial development, the engine of industrial upgrading and transformation, the cornerstone of a stable industrial chain and an important indicator of industrial productivity level.

纺织机械是产业发展的脊梁、转型升级的引擎、产业链稳定的基石，是衡量行业生产力水平的重要标志。

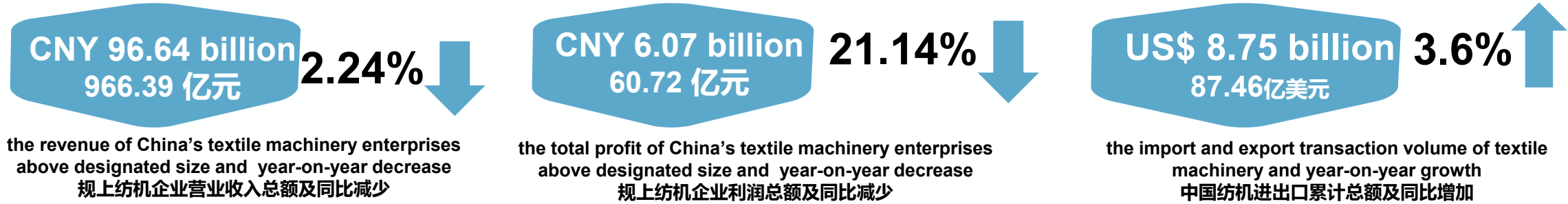
The development of textile machinery industry represents the direction and confidence, indicating the industrial trend and layout.

纺织机械行业的发展直接体现着产业的方向与信心，是产业趋势与布局的风向标。

- Textile machinery industry in China has a complete industrial system and a solid foundation. The export amount of China's textile machinery industry has topped the world list since 2019. 中国纺织机械行业体系完备、基础夯实。2019年以来行业出口金额保持全球首位。

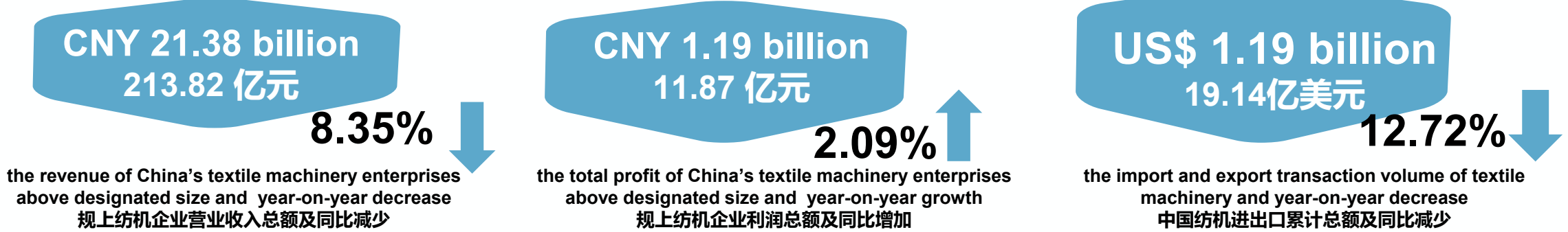
In 2022, the industry is a strong support for the world textile and apparel industry.

2022年，行业以稳定供给为全球纺织产业发展提供重要支持。



In the Q1 this year, the main reason is weak demand.

2023年第一季度，市场需求不足是行业面临的突出问题。



### III. China's Textile Machinery Industry - a Strong Support for the World Textile and Apparel Industry

### 三、中国纺织机械行业成为世界纺织工业的有力支撑

With the extension of global textile industrial chain into Southeast Asia and South Asia, the market shares in the regions are increasing.  
随着全球纺织产业链向东南亚、南亚的进一步延伸，这些地区在中国纺机出口市场中地位日渐突出。

Export of Textile machinery, 2023.1-3  
2023年1-3月纺织机械出口额

● Export by Countries and Regions 国家地区出口情况

Million USD  
百万美元

Destination国家（地区）	Value金额	% in total 占比（%）	YOY（%） 同比（%）
总额 Total	1184.9	100.0	-8.4
India 印度	374.14	31.6	43.1
Vietnam 越南	102.8	8.7	-19.6
Turkey 土耳其	85.0	7.2	-6.9
Bangladesh 孟加拉国	65.8	5.6	-44.0
United States 美国	60.5	5.1	66.2
Other countries/regions 其他国家和地区	496.7	41.9	-24.7

● Export by Sector 按品类出口情况

Million USD  
百万美元

产品类别Chapter	Value金额	% in total 占比（%）	YOY（%） 同比（%）
总额 Total	1184.9	100.0	-8.4
针织机械 Knitting machinery	281.8	23.8	-11.6
辅助装置及零配件 Accessories	232.1	19.6	-0.2
织造机械 Weaving machinery	203.1	17.1	50.5
印染后整理机械 Dyeing and finishing machinery	182.0	15.4	-14.4
纺纱机械 Spinning machinery	164.9	13.9	-25.5
化纤机械 Chemical fiber machinery	79.2	6.7	26.7
非织造布机械 Nonwovens machinery	41.8	3.5	-62.5

### III. China's Textile Machinery Industry - a Strong Support for the World Textile and Apparel Industry

### 三、中国纺织机械行业成为世界纺织工业的有力支撑

Japan, Germany, Italy, Belgium and Taiwan, China are the major sources of import.

日本、德国、意大利、比利时和中国台湾是中国纺织机械进口的主要来源地。

Import of Textile machinery, 2023.1-3  
2023年1-3月纺织机械进口额

● Import by Countries and Regions 国家地区进口情况

Million USD  
百万美元

Supplier国家（地区）	Value金额	% in total 占比（%）	YOY（%） 同比（%）
总额 Total	729.3	100.0	-18.9
Japan 日本	310.6	42.6	-7.2
Germany 德国	209.9	28.8	-16.5
Italy 意大利	51.0	7.0	-44.4
Belgium 比利时	25.5	3.5	-13.2
Taiwan, China 中国台湾	17.8	2.4	-51.4
Other countries/regions 其他国家和地区	114.5	15.7	-29.4

● Import by Sector 按品类进口情况

Million USD  
百万美元

Chapter产品类别	Value 金额	% in total 占比（%）	YOY（%） 同比（%）
总额 Total	729.3	100.0	-18.9
化纤机械 Chemical fiber machinery	274.3	37.6	14.2
辅助装置及零配件 Accessories	146.5	20.1	-22.0
纺纱机械 Spinning machinery	137.7	18.9	-26.0
织造机械 Weaving machinery	73.1	10.0	-34.4
印染后整理机械 Dyeing and finishing machinery	46.0	6.3	-51.5
针织机械 Knitting machinery	29.8	4.1	-15.3
非织造布机械 Nonwovens machinery	22.0	3.0	-49.5

### III. China's Textile Machinery Industry - a Strong Support for the World Textile and Apparel Industry

#### 三、中国纺织机械行业成为世界纺织工业的有力支撑

Textile machinery industry in China is accelerating industrial upgrading with quality as the core.

中国纺织机械行业正以质量为核心加快产业基础再造与优化升级。

- To reduce cost and improve efficiency to push forward the development of intelligent equipment
- 围绕降本增效，推进装备智能化

- Digital transition of the industry is focusing on short-process and automation equipment, specialized robots and intelligent systems.
- 以短流程和自动化装备、专用机器人、智能系统等领域为发展重点，推动行业数字化转型发展

- To reduce carbon emission and energy consumption to push forward the development of green equipment
- 围绕低碳节能，推进装备绿色化

- The key areas for innovation are chemical fiber machinery for production of biobased, degradable and regenerated fibers, environment-friendly printing and dyeing machinery and equipment for energy management system.
- 生物基纤维、可降解纤维、再生纤维等化纤生产机械，绿色印染装备和纺织装备能源管理系统成为纺机创新的重要方向。

- To push forward the development of high-end equipment
- 围绕应用拓展，推进装备高端化

- including the whole-set equipment for production of high-performance fibers such as carbon and aramid fibers, the shaping equipment for rope nets and composite materials, and the equipment for production of nonwovens for personal protection, medical care and industrial use.
- 在碳纤维、芳纶等高性能纤维生产成套装备，绳网、纤维复合材料成型装备，个体防护医卫用、工业用等非织造布成套装备等方面的创新与应用步伐加快。

## IV. China's Practices of Building a Modern Textile Industrial System

### 四、打造纺织现代化产业体系的中国实践

The world economy is now characterized by high turbulence, low growth and shallow recession.

当前，世界经济呈现高震荡、低增长、浅衰退特征。

# 3%

According to The IMF report, growth rate of the world economy in the next five years

IMF预测，未来五年全球经济增速

the lowest medium-term economic growth rate projected since 1990.

自1990年以来的最低中期经济增速预测

# 1.7%

According to the WTO report, growth rate of the the global trading in goods in 2023  
WTO预计，2023年全球商品贸易量增长

lower than the average growth in the past 12 years  
增幅低于过去12年的平均增长水平

a break-up of global manufacturing system, more technology confrontation  
全球生产体系割裂和技术对峙的情况加剧

low and weak demand, shortage of orders are major challenges our industry is facing.  
需求疲软、订单不足成为行业面临的主要问题。

To cope with the uncertainty of the world economy, we need to work together and upgrade our cooperation to build a more resilient and inclusive industrial system.

适应全球经济发展的不确定性，需要全球纺织行业创新合作，打造更有韧性、更加包容的产业体系。



## IV. China's Practices of Building a Modern Textile Industrial System

### 四、打造纺织现代化产业体系的中国实践

A new round of industrial transformation is coming.  
新一轮产业变革呼啸而来。

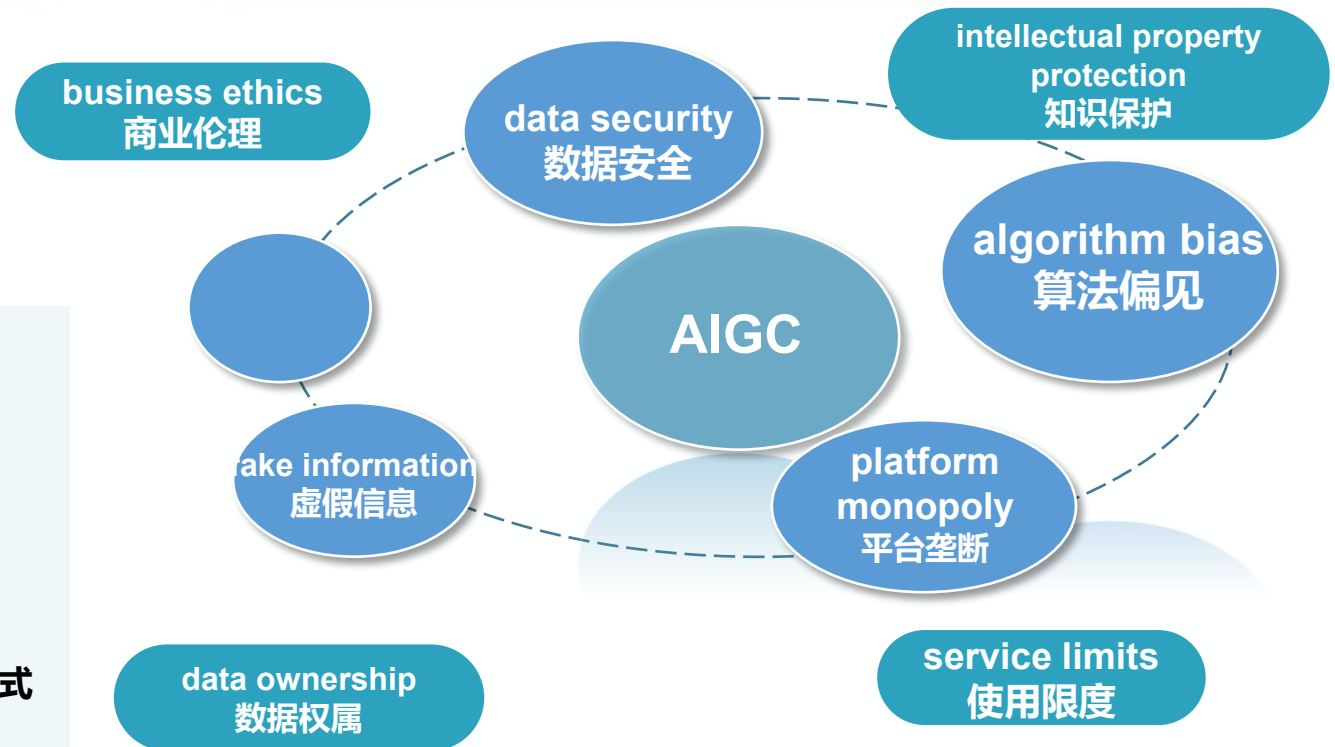
#### Disruptive achievements 颠覆性成果

- AI 人工智能
- quantum computing 量子计算
- new energy 新能源
- bio-pharmacy 生物医药

#### integrated innovation 融合性创新

- New approaches 新的方法工具
- New arenas 新的产业赛道
- New development patterns 新的发展范式

Industrial transformation also calls for the  
adjustment of governance rules.  
产业本身的深刻变革也在催生治理规则的调整。



In order to adapt to changes brought by science and tech innovation, we need more dialogue and cooperation to build an industrial system with new concepts and long-term values.

适应全球科技创新带来的改变，行业需要加强对话协商和务实合作，构建具有全新内涵和长远价值的产业体系。

## IV. China's Practices of Building a Modern Textile Industrial System

### 四、打造纺织现代化产业体系的中国实践

CNTAC has started the research and compiling work of a guideline for building a modern textile and apparel industrial system throughout the 2022-2035 period.

中国纺联启动了《建设纺织现代化产业体系行动纲要(2022-2035)》研究编制工作。

advanced high-end, intelligent and green manufacturing capability  
高端化、智能化、绿色化的先进制造能力

01

the innovation capability for diversified, high-quality and brand products  
增品种、提品质、创品牌的产品创新实力

02

a growth engine system driven by innovation, talents and capital integration  
创新引领、人才完备、资本融合的发展动力系统

03

纺织现代化  
产业体系

04

an organization form featuring the sound interaction of large, medium-sized and small enterprises, a safe industrial chain and layout of clusters  
大中小融通、产业链安全、集群化布局的产业组织形态

05

a development environment featuring green growth, social harmony and good governance  
环境友好、社会和谐、治理完善的产业发展环境

06

an industrial ecology with collaborative advantages, strong strategic support and consumption guidance  
协同优势明显、战略支撑强劲、消费引领突出的产业应用生态

## IV. China's Practices of Building a Modern Textile Industrial System

### 四、打造纺织现代化产业体系的中国实践

science and technology action  
for global industries to make  
progress together

推动全球行业进步的  
纺织科技行动

new materials, high-end equipment  
and advance technology

前沿材料、高端装备、先进工艺

social responsibility  
action for green  
manufacturing

纺织绿色制造  
和履行社会责任行动

A low-carbon, green and  
recycling system

低碳绿色循环体系

action for integrated  
development among eastern,  
central and western regions

促进东中西协调的  
纺织区域融通发展行动

the interacted and coordinated  
development across the regions

跨区域联动发展

action for the in-depth integration of  
digital economy and the textile and  
apparel industry

数字经济和纺织行业深度融合发展行动

make efforts to introduce and apply key digital  
technologies into the industry

数字经济关键技术融入与应用

New business models and patterns

新模式、新业态

01

02

03

04

05

06

07

fashion upgrading action for a cultural  
guidance

突出文化引领的纺织时尚升级行动

Traditional and modern culture

传统与现代文化

big masters, brands and events

大师大牌大事

human resources assurance

action for industrial  
modernization

适应现代化发展的  
纺织人力资源保障行动

high-quality, rich, well-structured and  
reasonably distributed human resources

素质优良、总量充裕、结构优化、分布合理

action for a safe and quick-response  
international supply chain

保障产业安全高效的国际供应链提升行动

the advantages in industrial size and system

规模优势、体系优势

serve the safe and stable industrial and supply chains.

服务全球纺织服装产业链供应链的安全稳定

**A single thread cannot be spun into a cord,  
and a single tree cannot create a forest,  
create a better future for textile & apparel industry.**

**丝缕相连，经纬交错，共创人间锦绣。**

**Thank you!**