



ITMF Global Textile Summit 的全球纺织业高峰会议

ITMF's recent textile summit in Egypt focused on the theme "Textile Competitiveness in an Integrated World."

ITMF最近于埃及举行的纺织业高峰会议，以“在世界融和中的纺织竞争”为主题。

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

The 2007 annual conference of the International Federation of Textile Manufacturers (ITMF) recently took place in Cairo, Egypt. This gathering of the global textile and textile engineering industry is one of the most important annual events in the textile industry. A high-class audience had the opportunity to attend an impressive seminar presenting top papers. The topic of this year's conference was "Textile Competitiveness in an Integrated World."

This conference report can only be an overview of a broad variety of papers given at the event. But one thing is for sure: times have changed

in the consciousness among the top league in textiles. Whoever mentioned the gentle use of resources, ecology and environment within the last few years and even spoke about it in public was often called a "green dreamer." These topics were hot for environmental activists and other environmental advocates, but hardly for the agenda of an ITMF conference. This has changed drastically for several reasons now because it is about nothing else than the future of the planet. Many speakers referred to this other way of doing business and appealed to the new environmental consciousness.

Cairo, the capital city of Egypt — famous for its pyramids — hosted the ITMF annual conference for the sixth time.

以金字塔闻名于世的埃及首都开罗，今年已是第六次举行ITMF年度会议。



Dr. Christian Schindler, director general, ITMF, reported the latest textile machinery investment trends to conference attendees. • ITMF 总裁 Christian Schindler 博士向与会者介绍最新的纺织机械投资趋势。



际纺织商协会 (International Federation of Textile Manufacturers, ITMF)

2007年度的国际会议，最近于埃及开罗成功闭幕。这个纺织业及纺织工程业的全球盛事，蔚为纺织业界的重要活动之一。大会透过研讨会，向高层的业者发表纺织业内最优质的论文。今年的研讨会主题，为“在世界融和中的纺织竞争” (“Textile Competitiveness in an Integrated World”)。

我们在此只能就大会众多的论文作重点报道。可以肯定的是，纺织业的主要玩家，对时势的意识已较前大大提高。几年前，凡提及资源、生态及环保的人士，又或是公开表达个人对环保看法的业者，一概被冠以“绿色造梦者”之名；而这些环保行动者及环保倡议者的热门讨论话题，实难以登上ITMF研讨会之堂。不过，时至今日，形势已彻底扭转过来，个中

原因多项，但最重要的，莫过于这主题关乎地球的未来。会上，不少讲者均提出新的商业方针，以唤起业界对环保的触觉。

第六届开罗会议

ITMF 总裁 Walter Simeoni 于会上向来自27个国家的140名与会者表示欢迎。协会成立后的103年内，曾先后多次于开罗举行研讨会，而今届这个如常“统筹得甚为成功”的会议，已是开罗的第六届会议。同时身为 South African Frame Textile Group 总经理的 Simeoni 表示，再次于开罗举行会议，反映埃及纺织业于全球纺织业上，占有重要的席位。此外，他又简述了会议的纲领及各项主题。纺织业约于40年前，在这个拥有47个国家、9亿1千2百万人口的地域蓬勃发展；时至今日，大会以“全球融和下的纺织业竞争力”为主题，唤醒业者对有关问题的关注。

Sixth Time In Cairo

ITMF President Walter Simeoni welcomed some 140 participants from 27 countries to the Egyptian capital. The as-usual very-well-organized conference took place in Cairo for the sixth time in the 103 years of the Federation's existence. Simeoni, General Manager of the South African Frame Textile Group, mentioned the return to Cairo underlines the importance of the Egyptian textile industry for the world. He also described the title and general theme of the conference, "Textile Competitiveness in an Integrated World," as a wake-up call for the continent with its 912 million inhabitants in 47 countries and a textile industry that had been flourishing some four decades ago.

Simeoni said there is one important aspect that Africa can learn from China: China does not permit the importation of second-hand clothing. One of the major reasons for the destruction of the textile value chain



Walter Simeoni, ITMF president and general manager of the South African Frame Textile Group, welcomed attendees to the ITMF conference.
• ITMF 主席暨 South African Frame Textile Group 总经理 Walter Simeoni 向ITMF 与会者致欢迎辞。

Simeoni 指非洲应向中国学习的重要事项之一，是中国禁止二手衣物进口。事实上，破坏非洲纺织业价值链的主因，是大量二手衣物自由入口。若新近成立的非洲联盟能立法禁止二手衣物进口非洲，应可为区内制造大量新职位。

国际棉花市场与中国 的角色

与纤维有关的研讨会向由 Andrew Macdonald 担当主持，至于今届掀开会议序幕的讲者，则为英国 Cotlook Ltd. Ray 董事长 Butler。他首先概述市场大势，指出国际市场互相依存，而中国的棉花市场则趋于增长。中国现时集全球最大的棉花生产、消耗及进口国于一身；虽然经历不少困难，中国的棉花及纺织业依然蓬勃增长。在中国开放纺织业予海外商家、允许海外企业参与国内棉花贸易的形势下，中国纺织业的前景将进一步走俏。

Butler 表示，全球的棉花消耗量于过去三年急速跃进。

总的来说，于2003至04年度完结的10年内，棉花的整体消耗量均有所增长，但其中亦有数个年度现出倒退。2004至05年度的增幅高达10%，创历来新高；其后数年的年增幅约为4%。

虽然棉花的价格向来低廉，但促成棉花消耗量持续上升的主要因素，包括全球经济强劲增长、中国进入世贸及纺织业与成衣协议解除前形成的投资趋势、行业预期废除配额制度引发的影响等。2004至05年度农业大丰收，全球棉花产量刷新纪录，超逾2600万立方吨。缔造此佳绩的原因，似乎并非纯然为适宜的天气，因为2005至06年度的产量只稍为回落，至2006至07年度又再创新高。

全球产量大幅增长 — 2000年以来一直现出高增长，平均增幅较1990年代下旬高出18%，预期2006至07年度的产量为每公顷773公斤。近年各国表现，以印度的数字最为突出，产量上扬逾70%；巴西约60%；中国40%；美国

within the African continent was and still is the free and unabated flow of second-hand clothing. If the newly created African Union could pass a directive to ban the importation of second-hand clothing into the continent, hundreds of thousands of new jobs could be created.

The International Cotton Market And China's Role

Ray Butler, managing director, Cotlook Ltd., England, opened the fiber session, which was chaired, as usual, by Andrew Macdonald. He gave a very broad view of the actual situation by mentioning that the interdependence of the international market and China's cotton market is growing. China is by far the biggest cotton producer and consumer, and the biggest importer. Despite persisting difficulties, China is increasingly engaging itself in relation to the cotton and textile sectors. This involvement surely will increase as the door is open now for foreign trading companies to engage in China's domestic cotton trade.

Butler mentioned there has been a sharp rise during the last three seasons in world cotton consumption. Cotton consumption grew during the decade ending in 2003-04, and in fact declined in some seasons. The 2004-05 season saw a virtually unprecedented leap of around 10 percent, and subsequent seasons have witnessed above-average growth of 4 percent per season.

Although cotton prices have been historically cheap, the increase in consumption has probably resulted more from strong worldwide economic growth, from investment trends established

prior to China's accession to the World Trade Organization and before the Agreement on Textiles and Clothing expired, and the anticipated subsequent removal of quota restrictions. The year 2004-05 was an exceptional agricultural year, in that world cotton production attained what was then a new record of more than 26 million metric tons. Something other than merely the weather was at work, since production in 2005-06 fell back only modestly, and 2006-07 saw another record.

World yields have increased enormously — the average so far this decade has been 18 percent more than during the second half of the 1990s, and estimated yield in 2006-07 was 773 kilograms per hectare. In the recent past, India has witnessed an increase in yield of more than 70 percent; Brazil, around 60 percent; China, 40 percent; and the United States, 33 percent. In cotton, the period has witnessed another “green revolution,” driven by the adoption of better farming practices and, specifically, the impact of genetically modified cotton strains. India, with the world's largest cotton area, has an average yield that is still only about two-thirds of the world average, with potential for further yield gains. Also, Brazil has the land available to increase plantings of cotton and cotton's main competitor crops.

The focus today is on sustainable cotton production, cotton being a renewable resource with advantageous fiber properties. Genetically modified seed varieties are contributing towards that goal, as they reduce pesticide use and thereby lower farmers' costs.

33%。就棉花业言，期间业界走上另一“绿色”革命之路，主因是棉农采用了更有效的耕作方式，其中尤以种植基因改造棉花的影响最大。拥有全球最大植棉面积的印度，现时平均产量只有全球平均数字的三份之二，预期该国的产量将有所突破。此外，巴西拥有大量合适的土地，可供开发为植棉地，以及用作种植可取代棉花的主要植物。

棉花是一种可再用的原材料，具有多项优秀的纤维特性，因此可持续的棉花生产技术蔚为今日行业的焦点。此外，经基因改良的种子多样，有助提升棉花的素质，而且农民由于得以减少使用杀虫剂，节省了种植的成本。

Butler亦指出，最新的中国数字，显示全球的棉花市场较前大为改变。“多年来，棉花业界的情况，全赖中国国家统计局定期就棉花及纱线产量公布的数字，然后再按此数字计算纤维的消耗量。”他表示：“这方式近来引起不少质疑，其中尤以2006至

07年度为甚，该年中国的表现并不如许多人预期般理想。”

Ray Butler认为，个中主要的问题不在于产量，而是消耗量。2008至09年度的消耗量大幅超越产量，全球的棉花业也就因而走上极罕见的局面。Butler的总结是，国际市场互相依存，而中国的棉花市场则仍然向好。



Ray Butler (above, bottom), managing director, Cotlook Ltd., opened the 2007 ITMF conference fiber session, which was chaired by Andrew Macdonald (above, top). • Cotlook Ltd 董事长Ray Butler (上图)为2007年度ITMF大会上，纤维主题会议的首位讲者。左为大会主持 Andrew Macdonald(上)。



John Cheh, vice chairman and COO, Esquel Group, discussed China's cotton industry. • Esquel Group 副主席暨首席营运官 John Cheh 在会上讨论中国棉花业的前景。

Butler also mentioned that new Chinese statistics indicate the global cotton market changed a lot. "For years, the cotton world has relied on data published at intervals by China's National Bureau of Statistics, both for cotton production and for yarn output, from which fiber consumption estimates have traditionally been calculated," he said. "These have increasingly come into question, particularly during the 2006-07 season, when the Chinese market did not behave as most people anticipated."

For Ray Butler, the key question may well be not production, but consumption. The 2008-09 season could see consumption outstrip production by another large margin, thus taking the world into territory that one has not witnessed for many a year. Butler summarized his paper by saying that the interdependence of the international market and China's cotton market is growing.

China's New Cotton Face

John Cheh, vice chairman and COO, Hong Kong-based Esquel Group, emphasized in his presentation, "The new Face of China's Cotton Industry," that the renminbi's

value had increased by 10.5 percent since July 2005 and is forecast to rise by 5 to 10 percent per year during the next two years, according to economists' estimates. In 2005, minimum wages rose by 20 to 40 percent, and social security expenses by 30 to 60 percent. At the same time, tax rebates for textiles and garments were reduced from 17 percent to 13 percent in 2004, and to 11 percent in 2007. Another burden was the new deposit for the processing industry: Now the companies need to pay a deposit of tariff and value-added tax for imported materials processed and exported as final goods from China. Cheh still considers China to be the leading source for garments, but Vietnam has already caught up.

Further sessions mentioned supply chain management, retailing in a globalized world, energy and renewable resources, and Egypt's place in the textile marketplace. Dr. Christian Schindler, director general, ITMF, reported on the latest textile machinery investment trends. At the end of the conference, participants had the opportunity to visit Setcore, a spinning mill in Alexandria, Egypt.

中国棉花市场的崭新面貌

香港 Esquel Group 副主席暨首席营运官 John Cheh 在他发表的讲题“中国棉花业的新面貌”中，指出人民币的币值自2005年7月至今，增幅已达10.5%；经济学家更预期人民币在未来两年，更会每年上涨5%至10%。以2005年计，中国工人的工资以最少20%至40%的幅度上涨，而社保开支的涨幅更达30%至60%。另一方面，纺织及成衣业的税务优惠却由17%，分别于2004年及2007年下降至13%及11%。行业的另一负担，是营运业务新订立的押金政策：企业在输入经处理的原材料，以及从中国输出制成品时，必须先缴纳关税及增值的押金。虽然 Cheh 认为中国仍然是成衣产品的领先产地，但越南的产量已逐步紧迫。

大会的其它研讨主题，尚包括供应链管理、全球一体化下的零售事务、能源及再生资源，以及埃及在纺织市场上的地位等。ITMF 总裁 Christian Schindler 博士则以最新的纺织机械投资趋势为题发表论文。大会更在结束前，安排与会者参观位于埃及亚历山大市的纺纱企业 Setcore 的厂房。

埃及产棉

埃及 Esquept Textile Cotton 主席 Ayman Nassar 概述了21世纪行业的科技要求。他指出纺织及成衣业在研发创新产品时，必须在安全及舒适的环境下进行，同时应考虑保护身体及健康的功能、创新的流动性、运

Egyptian Cotton

Ayman Nassar, president of Egypt Textile Cotton, gave an overview of technology requirements for the 21st century. In his vision, he mentioned textiles and apparel innovation is based on a safe and comfortable environment, effective protection and health care, innovative mobility, transport and energy solutions, the efficient use of natural resources and protection of the environment. The industry will consolidate and the companies will restructure with cut costs and become leaner due to the rising global competition.

Everybody, including Egyptian companies, is looking for higher-added-value products, and therefore, research and innovation become more important than ever. New applications for textiles — such as transport, engineering, construction, agriculture, medical, and power and environmental technologies — were just a few examples Nassar mentioned.

The Egyptian textile industry is changing, leaving the ivory tower to enter real life. Cotton production must be re-engineered and yield criteria re-evaluated; and efficient management of total acreage is required. Nassar is convinced that in the future, Egyptian cotton will be harvested by machines to withstand the global pressure from other cotton-growing countries.

Organic Cotton

Organic cotton has become synonymous with environmentally friendly cotton production in the last few years. Peter Tschannen, deputy managing director, Remei AG, Switzerland, has worked in the organic cotton field for many years.

ITMF At A Glance

ITMF简介

The International Textile Manufacturers Federation (ITMF) is one of the oldest non-governmental organizations in the world. It was founded in 1904, at a meeting held in Zurich, Switzerland, and convened at the initiative of the British cotton spinning industry. That's why it still has a very close relationship to the whole cotton industry.

ITMF is probably the most important and high-ranking textile association around the world. Members are associations and other constituted organizations of textile manufacturers. There can be only one member association from each country. Associate members include not only associations and other constituted textile manufacturers' organizations in countries already represented by a member association, but also associations allied to the textile industry.

More recently, it has been possible to become a corporate member of ITMF. These corporate members are manufacturers of textiles or of products allied to the textile industry, including textile machinery and retailers.

More information and the papers from the 2007 conference are available at www.itmf.org. The next ITMF conference host will be the island of Mauritius in October 2008.

The International Textile Manufacturers Federation (ITMF) 是全球历史悠久的非政府组织，于1904年瑞士苏黎世举行的一个会议上，由英国棉纱业倡议成立。由此可见ITMF至今仍与整个棉花行业维系深厚渊源的原因。

ITMF可能是全球最重要及最高层的纺织业组织，会员包括各个业内协会及合法的纺织业制造商组织；每个国家只能派出一个代表机构为会员。至于ITMF的附属会员，则除了包括各国合法协会会员下的属会及合法制造商组织，亦包括与纺织业有关的其它机构。

最近，协会亦接受业内企业申请为ITMF的企业会员。有关企业必须是纺织业的制造商，又或是与纺织业有关的商品生产商，包括纺织机械制造商及纺织品零售商等。

读者如欲进一步了解ITMF，以及浏览2007年度会议的论文，可登上www.itmf.org。下届ITMF会议将于2008年10月假毛里求斯举行。



Ayman Nassar, president, Egypt Textile Cotton, spoke about technology requirements. • Egypt Textile Cotton 主席Ayman Nassar 谈及科技的要求。



Peter Tschannen, deputy managing director, Remei AG, spoke about organic cotton. • Remei AG 副董事长 Peter Tschannen 就有机棉发表意见。

He said that organic cotton is more than a niche market, in spite of the small world market for organic cotton. World cotton production in 2006-07

was 25.3 million tons, and organic cotton production reached 49,959 tons, less than 0.2 percent of the total.

The organic cotton business is based on four principles: health; ecology; fairness; and care. Since 1995, Tschannen's company has partnered with one of the biggest retailers in Switzerland. To be successful, one needs reliable partners, working together along the whole production process. Tschannen said the integrated chain needs new skills:

- Production must be managed with available raw materials.
- Stocks must be available at every crucial point — just-in-time manufacturing.
- Price, ecology and social compliance must be balanced out — norms define the standards.
- Partners are not easily exchangeable.
- Innovation should be focused to strengthen partners.
- There must be continuous risk assessment throughout the chain.

Shortening the production chain means rationalization resulting from a sustainable approach. On a global scale, a breakthrough occurred when Wal-Mart started selling organic cotton in 2005. Other brands then followed.

In his conclusion, Tschannen said organic cotton is more than a niche market. It is an advantage for agriculture and the individual farmer, the industry along the chain, innovative entrepreneurs, consumers, and the environment. However, it needs a strong chain with a visionary network manager, and social transparency is a must.

The Consumer Decides

The attitude of the modern customer has changed dramatically. As

运输及能源方案、有效运用天然资源，以及环保等要素。行业将进行整固，而企业亦会因竞争趋剧而必须重组，以减低成本及节省资源。

现时全球各个企业，包括埃及公司在内，均积极开发高增值产品，因此研究及创新蔚为现时行业发展的重点。Nassar提及的崭新纺织应用模式，包括用于运输、工程、建设、农业、医疗，以及能源与环保技术等范畴。

埃及纺织业面临改革，将从象牙塔回归现实人生。行业必须整顿运作模式，重新厘订产能及总生产面积的效能管理标准。Nassar深信，未来埃及的棉花生产将采用机械运作，以面对由其它植棉国家而来的全球竞争压力。

有机棉花

过去数年，有机棉成为环保产棉的代名词。瑞士 Remei AG 副董事长 Peter Tschannen 为有机棉的资深业者，他表示虽然有机棉在全球市场上的销量不多，但行业并非只有狭小市场。2006至07年度的全球产棉量为2530万吨，其中有机棉产量为49959吨，占总产量不足0.2%。

有机棉的生产，以四大原则为本：健康、生态、公平及关爱。Tschannen 的公司自1995年起，便与瑞士大型的零售商缔结合作关系。要取得成功，企业必须与可靠的合作伙伴，于整个生产过程中紧密合作。Tschannen 指出，生产的综合链须具有崭新的技术：

- 必须具备充足的原材料进行生产;
- 经常备有存货 — 及时的生产模式;
- 于价格、生态及社会要求各方面达至平衡 — 标准由常规厘定;
- 合作伙伴难以更换;
- 强调创新, 以提高合作伙伴的能力;
- 应持续评估生产链内的各项风险。

缩短生产链, 是可持续发展的合理成果。有机棉在全球市场上的首项突破, 是Wal-Mart于2005年开始销售有机棉, 引领其它品牌争相仿效。

Tschannen 在总结时表示, 有机棉凌驾于狭小市场, 无论对农业及小农民、销售链内的各个行业、专注创新的企业家、消费者, 以及地球环境等方面, 均带来好处。不过, 行业仍需要强大的销售链, 以及具视野的网络经理进行开拓, 另外亦必须具备社会透明度。

消费者主导市场

现代消费者的态度与以前大不同。不少讲者均指出, 现时消费者的权利凌驾一切, 而环保意识亦持续提高。调查显示, 消费者具有无穷的求知欲 — 他们要知道商品的原材料、衣物的生产方式等等。时至今日, 纵是大品牌, 亦不得不加上环保的全球标签, 以及采用具社会良知的生产模式。以不损害环境的模式进行生产, 有利人类享受更理想的地球。延续地球的未来这环保思维, 深得现代消费者的认同。 **TW Asia**

some speakers reported, today, the power of the customer is stronger than ever, and environmental consciousness is rising permanently. After surveys, consumers want to know always more — they know more about what goods are made of and by which means their clothing is produced. Global labels that stand

for environmentally compatible and socially conscious production are enormously important for the big brands to survive. Products produced in an environmentally harmless manner — so that mankind can live in an integrated world and the future has a future — enjoy the sympathy of consumers. **TW Asia**

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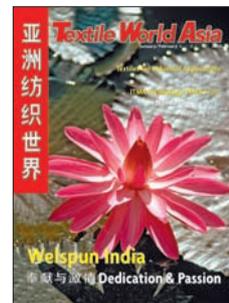
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