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

ITMF

年会 Conference
October 17-19, 2010, São Paulo, Brazil
巴西圣保罗市举行2010年10月17-19日
瑞士的国际纺织品生产协会（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，巴西纺织及成衣商会（ABIT）主席阿尤纳尔多·丁尼礼（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》：丁尼礼，您对ITMF研讨会有什么期望？各国代表为何要前往圣保罗市呢？

丁尼礼：这是巴西纺织业的重要时刻，因为研讨会将邀请全球及区域内纺织业的代表，向他们介绍巴西纺织业的潜力，是我们的荣幸！我们希望本届研讨会能够促进全国及ITMF组织的交流，为全球纺织业的持续发展做出贡献。

《亚洲纺织世界》：巴西纺织业未来的发展如何？

丁尼礼：巴西纺织业面临着前所未有的挑战和机遇。巴西纺织业正在经历一个快速发展的阶段，我们期待在这个平台上与全球同行共同探讨未来的发展方向。

The International Textile Manufacturers Federation Switzerland, will hold the Annual Conference in Paulo, Brazil, October 17-19. The textile and apparel industry (ABIT) President Ag Diniz Filho welcomes the readers of Textile World Asia to the event, which will play a very important role in the Brazilian textile industry.

TW Asia: Mr. Diniz, what expect from the ITMF conference and why should the delegates come to Paulo?

Diniz: It is a big moment for the Brazilian textile industry and we are looking forward to bringing Brazilian producers and international producers together. It is an honor to receive so many representatives from the textile world and some of the potential of the textile sector. We also expect to promote the excellent work that is being done to promote the textile sector.
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, exonerations 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.
Brazil and Its Textile Industry

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

By Jürg Rupp, Executive Editor

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 America, 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.
棉花及纺织品生产大国

巴西是第五大生产国，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400万个环锭纺纱机和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、织造、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

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<tr>
<th>World Cotton Consumption (millions of 480 lb-bales • 百万480-磅)</th>
<th>2006/07</th>
<th>2007/08</th>
<th>2008/09</th>
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Total • 总计 123.8 123.3 109.9 116.6 119.7

Source: USDA • 资料来源: 美国农业部
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.
时尚的巴西

然而，巴西不仅仅在棉纺
和服装行业发挥着重要的
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
这些活动，第二届Première
Brasil巴西视觉展，这项拉丁
美洲纺织行业的重要活动
于2010年7月在圣保罗的泛
美展览中心举办。这届展会
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Axel-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
(Preimière Vision)与巴西
的Fagga展览公司联合举办。

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。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
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巴西棉花出口
(Brazilian Cotton Exports)

<table>
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<tr>
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</table>

Source: Análise das Informações de Comércio Exterior

表3

Fashionable Brazil

但巴西扮演着一个重要的角色，它不仅对棉花和服装。南非和巴西的服装生产者正在倾向于更时尚的面料和产品。支持
这些活动的第二届Première
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<td>South Korea</td>
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<td>100,780</td>
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<td>149,902</td>
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<td>29,605</td>
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<td>35,777</td>
<td>27,743</td>
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<tr>
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<td>9,713</td>
<td>7,456</td>
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<td>13,559</td>
<td>31,761</td>
<td>24,773</td>
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<td>12,041</td>
<td>38,364</td>
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</tr>
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<td>18,013</td>
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<td>4,621</td>
<td>4,035</td>
<td>2,815</td>
<td>50.53</td>
<td>64.16</td>
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<td>2,010</td>
<td>1,606</td>
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<td>Others</td>
<td>33,829</td>
<td>26,167</td>
<td>37,168</td>
<td>26,763</td>
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<td>-2.95</td>
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<td>Total</td>
<td>684,576</td>
<td>504,916</td>
<td>696,05</td>
<td>532,949</td>
<td>-1.65</td>
<td>-5.26</td>
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</table>

Source: Análise das Informações de Comércio Exterior

表3

Fashionable Brazil

但巴西扮演着一个重要的角色，它不仅对棉花和服装。南非和巴西的服装生产者正在倾向于更时尚的面料和产品。支持
这些活动的第二届Première
Brasil，拉丁美洲纺织行业
重要的活动之一，于2010年7月
在圣保罗的泛美展览中心
举办。这届展会推出了
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Axel-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
(Preimière Vision)与巴西
的Fagga展览公司联合举办。

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。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，
该项展览在巴西的首
次亮相加强了拉丁美洲市
场及纺织产业的认可，意
味着巴西将成为一个业务
拓展的起点。
The Brazilian Textile Apparel Industry Assoc (ABIT) represents the Brazilian textile industries. Founded in the early 1960s, sponsors some 30,000 companies directly or indirectly work the whole textile production chain. The following aspects covered within ABIT’s different 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 cotton, viscose, linen, rayon;
- texturizing;
- sewing threads;
- weaving, including denim;
- knitting;
- warp knitting;
- apparel; and

ABIT’s Role in Brazil

Pushing Forward the Textile Industry

**Fernando Pimentel**

ABIT in Apex-Brasil (Brazilian Trade & Investment Promotion) supports, launched TexBrasil, this project aims to promote and develop the textile industry. In addition to global market expansion projects, TexBrasil also promotes strategies for companies to make the most of the opportunities that Apex offers. The纺织行业应加强与国际组织的合作，以支持本地纺织产业的发展，及将纺织品推向广大市场。ABIT and Apex Brasil are working together to promote Brazilian textile products worldwide. The project aims to strengthen and develop the textile industry, and promote Brazilian textile products to a broad audience.

**Pimentel’s Vision**

Through the initiatives and programs, ABIT is committed to advancing the textile industry’s sustainability and innovation. We are focused on enhancing the quality of our products and improving the competitiveness in the global market.

**ABIT’s Impact**

ABIT’s efforts have contributed to the growth and prosperity of the Brazilian textile industry. Through collaboration with Apex Brasil, we have been able to showcase our products and capabilities to a wider audience, thereby expanding our market reach and increasing our global presence. We are proud of our achievements and look forward to continuing our work in promoting the textile industry for the betterment of our nation and the world.
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：我的工作是推动组织及提出建议，以提高巴西纺织行业知名度。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ABIT的理念非常吻合。我们呼吁所有的小型以大部分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大产业。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**：您如何看待当前的市场状况？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，所以情况没那么坏。

- 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 profession training programs and support social and environmental programs, among other activities.

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

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

**Second-largest Industry**

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

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

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

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**: With other countries相比我们有很多优势：稳定的小金，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。所有这些构成了一个有利的投资环境。

**ITMF Year**

With 2010 ITMF Year will see in Brazil. The ITMF and ABIT's common purpose, this will be to the world of Brazil's textile industry to an important role.

**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 very important 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.