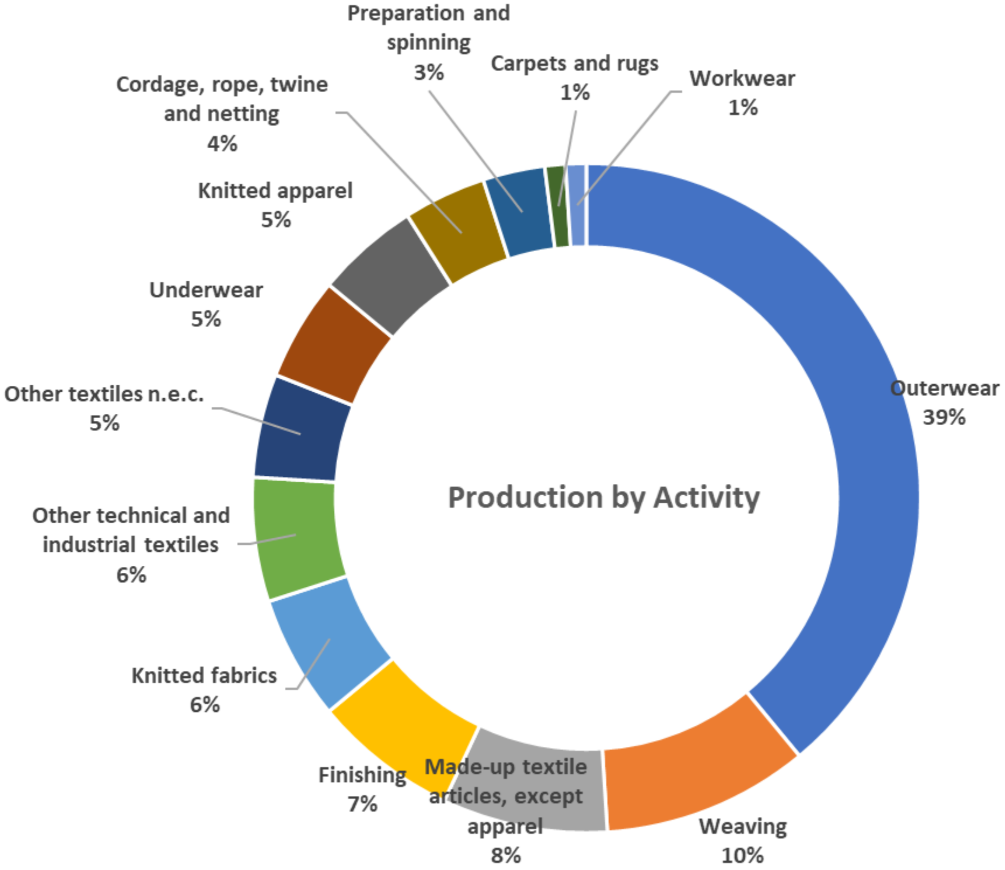
THE PORTUGUESE TEXTILE AND CLOTHING INDUSTRY

- *FACTS AND FIGURES*
- 6/9/2022

THE PORTUGUESE TEXTILE AND CLOTHING INDUSTRY
FACTS AND FIGURES

- Concentrated in the North region of Portugal



- Geographical proximity between the different actors in the value chain
- Industrial specialization, know-how and reliability
- Organized in a cluster, integrated and complete

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THE PORTUGUESE TEXTILE AND CLOTHING INDUSTRY
FACTS AND FIGURES

- Supported by diverse, specialized and internationally recognized centers of competence
- Strong connection to the scientific and technological system
- Resilience, flexibility, quality, quick response
- Differentiation, innovation, design, technology, creativity, value-added services
- Excellent social responsibility and sustainability practices

THE PORTUGUESE TEXTILE AND CLOTHING INDUSTRY
FACTS AND FIGURES

- **One of the most important industries for Portugal**:
  - 18% Employment in the Manufacturing Industry
  - 11% GVA in the Manufacturing Industry
  - 9% Exports

- **Portugal: one of the most important players in the EU Textile and Clothing industry**:
  - 5% Turnover (#5)
  - 9% Employment (#4)
  - 5% GVA (#5)

- **The EU Textile and Clothing industry**:
  - Turnover: 162 billion €
  - Employment: 1,5 million
  - Exports: 61 billion €
  - Companies: 160 thousand

THE PORTUGUESE TEXTILE AND CLOTHING INDUSTRY FACTS AND FIGURES

	2019	2020	2021	Evol. 21/20	Evol. 21/19
Turnover (million €)	7 683	6 941	*7 750*	11,7%	0,9%
Production (million €)	7 467	6 696	*7 500*	12,0%	0,4%
Employment	136 101	128 373	*132 000*	2,8%	-3,0%
Exports (million €)	5 215	4 653	5 413	16,3%	3,8%
Imports (million €)	4 443	3 781	4 307	13,9%	-3,1%
Trade Balance (million €)	771	872	1 106	26,9%	43,3%

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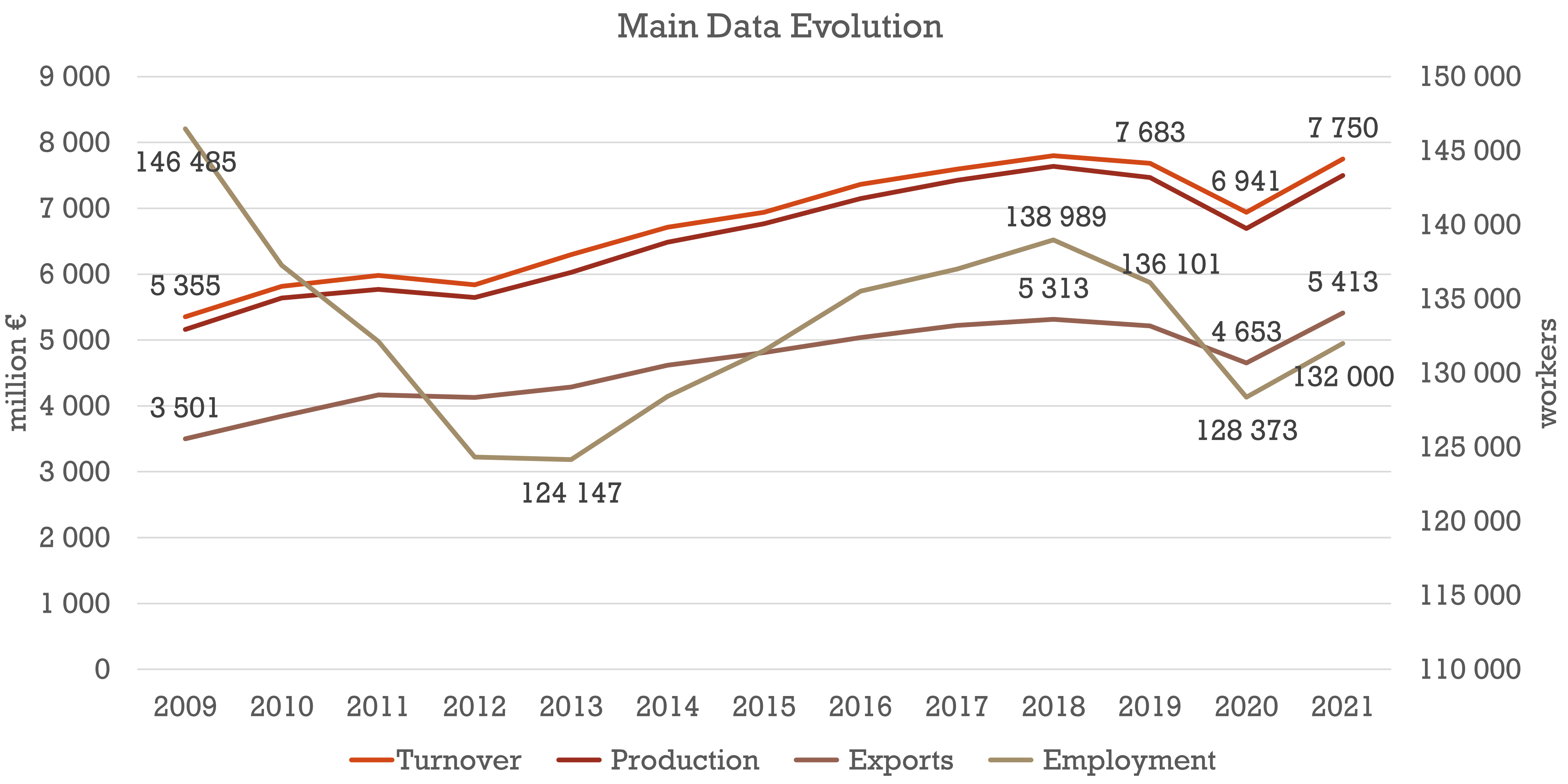

A DECADE OF GROWTH (2009-19) :
TURNOVER: +43%
EXPORTS: +49%

2021: THE BEST YEAR EVER FOR EXPORTS: +4% » 2019

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THE PORTUGUESE TEXTILE AND CLOTHING INDUSTRY
FACTS AND FIGURES

oriented towards international markets

T&C Exports

Value_million euros	Jan.-Jun. 22	Evol. 22/21	Evol. 22/19	Share 22
Textiles (except Home Textiles)	902	24%	21%	29%
Clothing	1 760	18%	12%	56%
Home Textiles and other made up articles	474	14%	41%	15%
TOTAL	**3 135**	**19%**	**18%**	**100%**

Quant._ 1.000 tones	Jan.-Jun. 22	Evol. 22/21	Evol. 22/19	Share 22
Textiles (except Home Textiles)	185	5%	5%	64%
Clothing	47	-5%	-4%	16%
Home Textiles and other made up articles	59	5%	23%	20%
TOTAL	**291**	**3%**	**7%**	**100%**

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- International vocation: exports to over 180 markets with greater presence in European and North American markets

MAIN CLIENTS

million euros	Jan.-Jun. 22	Evol. 22/21	Evol. 22/19	Share 22
Spain	726	10%	-10%	23%
France	492	25%	40%	16%
Germany	279	18%	24%	9%
Italy	250	40%	47%	8%
USA	231	17%	44%	7%
UK	203	8%	0%	6%
Netherlands	158	17%	37%	5%
Belgium	77	42%	56%	2%
Sweden	73	20%	36%	2%
Denmark	58	9%	43%	2%
Intra UE (27)	2 327	19%	18%	74%
Extra UE (27)	808	16%	19%	26%
TOTAL	**3 135**	**19%**	**18%**	**100%**

THE PORTUGUESE TEXTILE AND CLOTHING INDUSTRY FACTS AND FIGURES

- "Made in Portugal" has positive reputation worldwide

THE PORTUGUESE TEXTILE AND CLOTHING INDUSTRY
FACTS AND FIGURES

Destinations with the greatest growth in absolute terms		
(growth in million euros)		*Evol. Jan.-Jun. 22/21*
France	100	25%
Italy	71	40%
Spain	65	10%
Germany	42	18%
USA	33	17%

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MAIN PRODUCTS EXPORTED

	Exports Jan.- Jun. 2022	Evolution 2022/21		Share 2022
	million €	million €	%	%
6109: T-shirts, singlets and other vests, knitted or crocheted	494	56	13%	16%
6302: Bedlinen, table linen, toilet linen and kitchen linen	322	39	14%	10%
6110: Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted	277	49	22%	9%
5607: Twine, cordage, ropes and cables	156	34	28%	5%
6204: Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, trousers, ... and shorts	137	37	38%	4%

THE PORTUGUESE TEXTILE AND CLOTHING INDUSTRY FACTS AND FIGURES

EXPORTED PRODUCTS WITH THE GREATEST GROWTH IN ABSOLUTE TERMS

	(growth in million €)	*Evol. Jan.-Jun. 22/21*
6109: T-shirts, singlets and other vests, knitted or crocheted	56	13%
6110: Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted	49	22%
6203: Men's or boys' suits, ensembles, jackets, blazers, trousers, ... and shorts	42	45%
6302: Bedlinen, table linen, toilet linen and kitchen linen	39	14%
6204: Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, trousers, ... and shorts	37	38%

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T&C INDUSTRY IMPORTS

Value_million euros	Jan.-Jun. 22	Evol. 22/21	Evol. 22/19	Share 22
Textiles (except Home Textiles)	1 241	35%	29%	47%
Clothing	1 201	47%	13%	46%
Home Textiles and other made up articles	184	11%	40%	7%
TOTAL	**2 626**	**38%**	**22%**	**100%**

Quant._ 1.000 tones	Jan.-Jun. 22	Evol. 22/21	Evol. 22/19	Share 22
Textiles (except Home Textiles)	243	3%	5%	74%
Clothing	49	26%	-1%	15%
Home Textiles and other made up articles	38	21%	34%	11%
TOTAL	**329**	**7%**	**6%**	**100%**

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MAIN SUPPLIERS

million euros	Jan.-Jun. 22	Evol. 22/21	Evol. 22/19	Share 22
Spain	826	43%	13%	31%
Italy	287	27%	10%	11%
China	222	38%	41%	8%
India	222	89%	86%	8%
Germany	186	40%	17%	7%
Turkey	148	17%	83%	6%
France	148	16%	10%	6%
Pakistan	131	63%	79%	5%
Netherlands	69	16%	-3%	3%
Belgium	60	22%	21%	2%
Intra UE (27)	1 657	33%	11%	63%
Extra UE (27)	968	46%	46%	37%
TOTAL	**2 626**	**37,9%**	**22,1%**	**100%**

THE PORTUGUESE TEXTILE AND CLOTHING INDUSTRY
FACTS AND FIGURES

Origins with the greatest growth in absolute terms

(growth in million euros)		*Evol. Jan.-Jun. 22/21*
Spain	248	13%
India	105	86%
Italy	61	10%
China	61	41%
Germany	53	17%

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2030 - PROSPECTIVE VISION AND STRATEGIES

7 STRATEGIC PRIORITIES

To increase business profitability, productivity and competitiveness

1. Differentiation
2. Sustainability
3. Digitalization
4. Cooperation
5. HR Training
6. Internationalization
7. Capitalization

THE PORTUGUESE TEXTILE AND CLOTHING INDUSTRY
FACTS AND FIGURES

2ND SEMESTER

Energy crisis

Inflation

Consumption / new orders

EU and PT supporting measures

Companies
Consumers /families

Energy
Food
Housing costs

Revenue / savings / consumption
Production costs

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ATP - WHO WE ARE

- Employers' association – national scope – Textile and Clothing Sector

- Since 1965

- 500 members from fibres to final products (clothing, home textiles and technical textiles) including services: 3,5 billion € turnover | 35 thousand workers

- **Mission:**
  To unify, empower and defend the interests of the members
  To promote conditions to improve companies' competitiveness and growth
  To provide useful and customized services
  To ensure the future and the dynamic of a traditional and modern activity

- International filiations:

EURATEX THE EUROPEAN APPAREL AND TEXTILE CONFEDERATION

iaf INTERNATIONAL APPAREL FEDERATION

ITMF INTERNATIONAL TEXTILE MANUFACTURERS FEDERATION

ETIC european textile identity card

sustainable FASHION FROM PORTUGAL

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