

Analyze of the Bulgarian T&C industry
 January - November 2011

Table 1: Goods, forming 85% from the entire export of textile, clothing and knitwear for the period January – November 2011.

Main groups of goods and products, forming more than 85% from the entire export in the textile industry for the period January – November 2011.			
ITEM	Export/million Euro	% from the whole export	Changes comparing to the period 1-11/2010
Suits, sets of clothing, jackets, dresses, skirts, skirt-trousers, trousers etc. (6103,6104,6203, 6204)	509,9	33,2	16,7
Shirts, shirts with shorts sleeves, blouses, shirt-blouses, chemisettes (6106,6205,6206)	192,9	12,6	3,0
T-shirts with sleeves, T-shirts without collars, T-shirts, Sweaters, Cardigans, vests and other similar articles (6109,6110)	174,0	11,3	4,8
Yarn of worsted wool, not available for retail sales 5107, 5509, 5402	128,8	8,4	26,4
Coats, cloaks, anoraks, overhead blouses and other similar articles for ladies and girls(6201,6202)	114,0	7,4	15,4
Briefs, nightwear, pajamas, bathrobe, wrappers and other similar articles 6107, 6108, 6212	59,9	3,9	8,5
Sportswear, overalls, ski and beach wear 6211, 6112	53,8	3,5	27,5
Tights, socks, and others similar articles 6115	41,7	2,7	7,8
Bed linen, table linen, toilet linen and kitchen linen 6302	17,8	1,2	14,4
Other knitwear goods 6006	15,0	1,0	19,9

Source: NSI / MEE

- The export to the 10 commodity groups for the period January-November 2011 amounted to 1 307, 8 million euros and increased on an annual basis with a 13, 2%.
In that period the trend is retained and the market and the producers of textile and clothing in Bulgarian remain concentrate on a limited range of goods. For the period the whole amount of export amounted to 1 534, 7 million euros and grew on an annual base with a 14, 7% (196, 7 million Euro).
- **The biggest share in the export of textile and clothing have : Suits, sets of clothing, jackets, dresses, skirts, skirt-trousers, trousers etc** which for the indicated period reached almost 510 million Euro (33, 2%) and grew on an annual base with a 16, 7%. The smallest share in the export has: other knitwear goods with almost 1% of the export.

Table 2: Goods, forming 85% from the entire import of textile, clothing and knitwear for the period January – November 2011.

Major groups of goods forming 85 % of the entire import in the textile and clothing industry for the period January – November 2011 r.			
ITEM	Import/million euro	% from the entire import	Changes comparing to the period 1-11/2010
Woven fabrics of yarns of synthetic and cotton fibres 5407, 5208, 5112, 5209, 5903, 5211, 5515, 5111, 5408, 5210, 5516, 5212, 5513, 5514, 5309, 5007	389,1	30,9	18,7
Other knitwear goods 6006, 6004, 6005, 6001	166,0	13,2	15,1
Suits, sets of clothing, jackets, trousers 6203, 6204, 6104	86,1	6,8	-2,9
Woven, fine or coarse hair, worsted etc. 5105	75,0	5,9	69,6
Synthetic and cotton yarns 5402, 5205, 5509	64,9	5,1	25,5
T-shirts with sleeves, without collar 6109, 6110	58,1	4,6	-1,0
Other ready to wear accessories for clothing 6217, 5806, 5807, 5804	55,3	4,4	15,7
Shirts, shirts with shorts sleeves, blouses, shirt-blouses, chemisettes 6106, 6206, 6205	51,1	4,1	-9,4
Man-made filaments 5501, 5503, 5502, 5401	46,5	3,7	8,4
Non-woven textile materials, whether or not impregnated, coated, covered or laminated 5603, 5601	39,0	3,1	27,2

Tights, socks, and others similar articles 6115, 6108	27,4	2,2	1,2
Coats, cloaks, anoraks, overhead blouses and other similar articles 6202, 6201	16,6	1,3	24,9

Source: NSI / MEE

- The analyze of the data for the import of textile, knitwear and clothing for the period January – November 2011 shows quite high concentration in several groups of goods. A trend which is similar to the export. Continue the trend for import of different kind of woven fabrics, that amounted to 389,1 million Euro and represents 30,9% from the country's import (comparing to 327,8 million Euro for the same period in 2010). The import of that kind of goods grew on an annual base with 18.7%. Smallest share in the import has the group: Coats, cloaks, anoraks, overhead blouses and other similar articles. For the indicated period it amounted to 16,6 million Euro and represents 1,3% from the entire import of the country or grew on an annual base to 24,9%.
- For the period January - November 2011, the import of the leading group of goods forming 85% from the entire import in the T&C industry, grew on an annual base with **15.2% (141,6 million Euro)**
- **The trade balance of the industry for the indicated period remained positive and reached 274, 6 million Euros.**

Table 3: Major countries to which is directed the export of Bulgarian textile and clothing products

Leading countries for the Bulgarian export for the goods from T&C industry – period 1 - 11/2011			
Country	Export/million Euro	% from the whole export	Changes comparing to the period 1-11/2010
Italy	388.1	25.3	17.6
Germany	363.2	23.7	15.3
Greece	177.5	11.6	-2.6
France	154.9	10.1	24.6
Great Britain	66.8	4.4	27.9
Spain	48.0	3.1	4.2
Austria	41.2	2.7	16.2
Romania	37.4	2.4	42.6
Belgium	36.9	2.4	14.3
Turkey	32.4	2.1	7.6

Source: NSI/MEE

- **For the period January - November 2011 the main markets for the Bulgarian T&C industry remain the same. A production for 1 346 million Euro is realized on it or almost 88% from the export.**

- Italy keeps the first place with share of 25, 3%. Germany (23, 7%) and Greece (11, 6%) are following. At that way in those countries Bulgaria realized almost the half of the exported T&C goods.
- Traditionally the sale of our T&C production is made generally in EU countries, less in the Balkans countries. Our main Balkans partners are Greece, Turkey, and Romania, where for the period is realized a production amounted to 247 million Euros.
- **For the period January – November 2011 the export of T&C goods grew by 14.7%** - from 1 174 million Euros for 1-11/2010 to 1 346 million Euros for 1-11/2011

Table 4: Major countries to which is directed the import of Bulgarian textile and clothing products

Leading countries for the Bulgarian import for the goods from T&C industry – period 1 - 11/2011			
Country	Import/million Euro	% of the entire import	Changes comparing to 1-11/2010
Italy	313.2	24.9	20.6
Germany	177.7	14.1	16.9
Greece	168.3	13.4	-7.8
Turkey	156.9	12.5	11.3
France	85.9	6.8	9.9
China	41.9	3.3	98.2
Austria	39.9	3.2	0.9
Czech Republic	39.7	3.2	29.6
Spain	32.7	2.6	-0.9
Great Britain	28.5	2.3	27.7

Source: NSI /MEE

- **For the period January – November 2012 main countries in the import forming more than 85%** (1 085 млн. евро) of the T&C import , reached an increase of 13% on an annual base.
- Again Italy is the major actor (24,9%), following by Germany (14,1%) and Greece (13,4%). Those three countries are the source of almost the half of the imported in Bulgaria T&C goods
- Our major Balkan partners are Greece and Turkey. **For the period January - November 2011 r.** from those countries we are imported goods for an amount of 325 million Euros. The import from Greece had a decrease with 7,8% on an annual base.

Average number of employees in T&O in 2011 - 97380 people, change from 2010: a decrease of 15 810 people, or about 14 % .

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