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Textile and Clothing Board / Commission du textile et du vêtement

ANNUAL REPORT ON TEXTILES AND CLOTHING 1983

Canada

Government of Canada Gouvernement du Canada
Regional Industrial Expansion Expansion industrielle régionale

NEWS RELEASE

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For release
IMMEDIATE

Subject

TEXTILE AND CLOTHING BOARD ANNUAL REPORT RELEASED

RIE 44 /84

OTTAWA, February 24, 1984 -- Industry Minister Ed Lumley today released the 1983 Annual Report on textiles and clothing prepared by the Textile and Clothing Board.

The two parts of this Report present respectively an account of the developments in the economic situation of the textile and clothing industries in 1982 and during the first months in 1983, and the results of a survey on the age of equipment in these two industries.

The Board mentions in its report that the textile and clothing industries were definitely affected by the 1982 recession. Production declined overall by 17 per cent and employment, by close to 15 per cent. However, encouraging signs of recovery appeared during the first few months of 1983, and the two industries managed to recover some of the losses.

In spite of the decline in 1982, the two industries maintained and in some cases enhanced their productivity per hour worked. Price increases for clothing in 1982 were moderate, increasing by five per cent over 1981 against an average of 11 per cent in the overall consumer price index and this relationship continued into the first months of 1983.

Investments declined during the 1982 recession. In 1983 there were moderate increases in investment plans of the primary textiles and knitting sectors but, because of general market uncertainty, investment plans in the clothing industry were still decreasing.

During the recession the share of the apparent market held by domestic producers decreased from 74 per cent in 1981 to 72 per cent in 1982 for yarns, from 52 per cent to 50 per cent for fabrics, and from 69 per cent to 67 per cent for clothing. One garment in three sold in Canada in 1982 was imported.

The results of the Board's survey of the age of equipment used in the textile and clothing industries show that production equipment has been modernized regularly in the last few years and that in certain instances the modernization effort has resulted in a rejuvenation of part of the equipment.

The Board concludes that the overall performance of the textile and clothing industries will improve although it is unlikely that its share of the Canadian market will come back to its former level.

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Government of Canada
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Textile and Clothing Board
Commission du textile et du vêtement

Ottawa, Canada
K1A 0H5

October 6, 1983

The Honourable Edward C. Lumley, P.C., M.P.
Minister of Industry, Trade and Commerce
and of Regional Economic Expansion
Ottawa, Ontario
K1A 0H5

Mr. Minister:

We have the honour and pleasure of presenting the third annual Report of the Board on the situation of the textile and clothing industries.

The first part of this annual Report is an account of the performance of the textile and clothing industries in the last year, and more specifically, what effects the recession has had on these two industries. The second part contains the results of the third annual survey carried out by the Board on the age and state of equipment in the textile and clothing industries.

Yours sincerely,

Jacques St-Laurent
Member

Otto E. Thur
Chairman

Canada

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I — Situation in the Textile and Clothing Industries in 1982

1 — General Economic Situation

For some industrialized countries, notably for Canada and the United States, the six quarters from the beginning of summer 1981 to the end of 1982 have represented the longest and most severe economic recession since the great depression of the 30's. Canada, with its very open economy and its concentration on the production of raw materials, has been affected more seriously than the other major industrial countries. In fact, with the exception of government expenditures which increased slightly in real terms, but even less than increases in other major countries except West Germany, all the major components of national expenditures in Canada have experienced greater declines than elsewhere. The major drop in private domestic capital expenditures and the decrease in consumers' expenditures should be specifically noted. (Table 1).

Table 1

GROSS NATIONAL OR DOMESTIC EXPENDITURE AND ITS COMPONENTS IN MAJOR INDUSTRIAL COUNTRIES[1]
Per cent change from 1981 to 1982, constant prices

	Canada	United States	West Germany	Italy	United Kingdom	Japan
Consumers' expenditures	−2.4	1.0	−2.2	0.3	1.1	4.2
Government expenditures	0.9	1.5	−0.1	1.8	1.9	2.0
Private domestic capital expenditures	−14.0	−5.0	−5.6	−5.3	3.6	1.2
Exports of goods and services	−1.5	−6.5	3.5	1.2	0.7	3.3
Imports of goods and services	−10.4	0	0.4	2.1	4.8	3.1
Gross national or domestic expenditure	**−4.8**	**−1.7**	**−1.1**	**−0.4**	**1.4**	**3.0**

[1] Gross domestic expenditure for Italy and the United Kingdom, gross national expenditure for the other countries.
SOURCE: OECD, Main Economic Indicators, June 1983.

As the economic cycle reflects fluctuations of industrial origin, it is evidently industrial production, and more particularly the manufacturing sector, which bears the consequences. Fluctuations in manufacturing, both upward and downward, are more pronounced than for larger aggregates such as gross national product or gross national expenditure. If, among the major industrial countries, the Canadian economy was the one which suffered the most serious decline, it was that much more so for industrial production and manufacturing. (Table 2).

Table 2

INDUSTRIAL PRODUCTION AND MANUFACTURING IN MAJOR INDUSTRIAL COUNTRIES

Per cent change from 1981 to 1982

	Industrial production	Manufacturing
Canada	−10.8	−11.8
United States	−7.8	−8.5
West Germany	−2.6	−2.6
Italy	−3.2	−4.0
France	−1.7	−1.8
United Kingdom	0.5	−1.1
Japan	1.4	1.4
OECD — North America	−7.8	−9.3
OECD — Europe	−1.7	−1.8
European Economic Community	−1.7	−1.8
OECD — Total	**−4.0**	**−4.0**

SOURCE: OECD, Indicators of Industrial Activity, 1983-I.

Such a substantial drop in industrial production is sufficient explanation for the significant decline in private domestic capital expenditures mentioned earlier. In fact, the drop in production has resulted in considerable unused production capacity and serious weakening of the financial situation of individual firms.

As a decrease in industrial production results in increased unemployment and a reduction in real income, it also explains the decline in consumers' expenditures (see Table 1) and their main component, retail sales. From 1981 to 1982, the volume of sales has decreased in Canada more than elsewhere, and unemployment has also increased more rapidly than elsewhere. (Table 3).

A cyclical decrease, even if it is a major one, does not necessarily affect all industries equally. In general, consumer goods are less affected than capital goods and finished manufactured products are less affected than fabricated

Table 3

RETAIL SALES AND UNEMPLOYMENT RATES IN MAJOR INDUSTRIAL COUNTRIES

Retail sales: per cent change from 1981 to 1982
Unemployment: rates and per cent change from 1981

	Changes in retail sales	Unemployment rate 1981	Unemployment rate 1982	Changes in unemployment rates
Canada	−5.7	7.5	10.8	44.0
United States	−1.7	7.5	9.5	26.7
West Germany	−4.5	4.4	6.1	38.6
Italy	3.5	8.3	8.9	7.2
France	1.8	7.3	8.0	9.6
United Kingdom	2.8	10.7	12.5	16.8
Japan	1.0	2.2	2.4	9.1
OECD — North America	−1.8	7.5	9.6	28.0
OECD — Europe	−1.0	7.9	9.3	17.7
European Economic Community	−0.9	7.7	9.1	18.2
OECD — Total	**−1.0**	**6.7**	**8.1**	**20.9**

SOURCE: OECD, Main Economic Indicators, June 1983.

raw materials. This generally valid observation is only partially confirmed in 1982 with regard to manufacturing in Canada. (Table 4). In fact, the extent of the contraction is surprising in such industry sectors as furniture, textiles, leather and leather products, and clothing.

As shown in Table 4, the textile and clothing industries experienced a very difficult year in 1982. Weakness in final demand and major inventory reductions have combined to lower production and employment considerably in these two industries.

In spite of accumulated difficulties since the beginning of the recession, it is worth noting that signs of improvement began to appear in the last quarter of 1982, and that since then they have multiplied and become more general. The recession therefore appears to be over, and 1983 should be a year of more satisfactory growth.

Table 4

PRODUCTION AND EMPLOYMENT IN CANADIAN MANUFACTURING INDUSTRIES

Per cent change from 1981 to 1982

	Gross domestic product	Employment
Furniture and fixtures	−25.8	−19.8
Textiles	−21.3	−16.0
Non-metallic mineral products	−20.4	−14.4
Primary metals	−19.9	−11.4
Non-electrical machinery	−19.0	−11.3
Metal fabrications	−17.5	−13.5
Leather and leather products	−16.0	−14.7
Clothing	−15.3	−14.8
Wood	−14.1	−17.6
Rubber and plastic products	−13.8	−6.1
Petroleum and coal products	−12.6	1.6
Electrical products	−12.0	−6.8
Chemical products	−9.7	−3.2
Transportation equipment	−9.4	−10.4
Knitting	−9.0	−10.2
Paper and paper products	−9.0	−6.6
Printing, publishing and allied industries	−8.4	−2.4
Food and beverages	−1.8	−3.3
Tobacco products	−0.6	−1.2
Total manufacturing	**−12.3**	**−9.3**

SOURCE: Statistics Canada, Canadian Statistical Review, Cat. 11-003E, May 1983.

2 — Final Demand for Textile Products

Clothing expenditures in 1982 showed only a slight nominal increase of less than two per cent compared to 1981, while total expenditures increased less than ten per cent, again in nominal terms. With regard to furniture and furnishings, another category of expenditures with a substanial textile content, the nominal increase remained below one per cent. (Table 5).

Under these conditions, the share of total consumer expenditures held by clothing and textile products has continued to decrease. In 1977, the share of clothing was 6.1 per cent of total expenditures and 9.8 per cent for furniture and furnishings; in 1982, they amounted to only 5.3 and 8.2 per cent respectively.

Table 5

PERSONAL EXPENDITURES FOR GOODS AND SERVICES

Millions of current dollars and per cent distribution

Expenditure category	1977 $	1977 % of total	1978 $	1978 % of total	1979 $	1979 % of total	1980 $	1980 % of total	1981 $	1981 % of total	1982 $	1982 % of total
Food, beverages and tobacco	24,756	20.2	27,460	20.3	30,597	20.3	34,248	20.3	38,993	20.4	42,282	20.2
Gross rent, fuel and power	21,850	17.8	24,299	18.0	27,295	18.1	30,970	18.4	35,792	18.7	44,823	21.4
Transportation and communication	17,957	14.7	19,621	14.5	22,397	14.9	24,750	14.7	28,695	15.0	30,113	14.4
Personal goods and services	19,308	15.8	21,660	16.0	24,243	16.2	27,605	16.4	31,063	16.3	33,007	15.7
Medical care and health services	3,829	3.1	4,372	3.3	4,881	3.2	5,593	3.3	6,544	3.4	7,193	3.4
Footwear	1,323	1.1	1,443	1.1	1,648	1.1	1,825	1.1	2,048	1.1	2,083	1.0
Recreation and education	12,691	10.3	13,825	10.2	15,357	10.2	17,181	10.2	19,150	10.0	21,012	10.0
Clothing	7,450	6.1	8,065	6.0	8,980	6.0	9,782	5.8	10,938	5.7	11,144	5.3
Furniture, furnishings and household operation	12,016	9.8	13,018	9.6	14,348	9.5	15,563	9.3	17,078	9.0	17,247	8.2
Net expenditures abroad	1,350	1.1	1,390	1.0	775	0.5	878	0.5	724	0.4	897	0.4
TOTAL	**122,530**	**100.0**	**135,153**	**100.0**	**150,521**	**100.0**	**168,395**	**100.0**	**191,025**	**100.0**	**209,801**	**100.0**

SOURCE: Statistics Canada, Cat. 13-201.

For the last five years, and particularly from 1981 to 1982, the increase in expenditures for rent, fuel and power has been such that all other categories of expenditures have had to be reduced. This is evidently a direct result of increases in housing prices, mortgage interest rates, property taxes, and more importantly, costs of the various forms of energy.

Clothing expenditures increased only 1.9 per cent in 1982 while consumer prices for clothing increased 5.0 per cent. As a result, consumer expenditures for clothing in that year decreased in real terms by some 3.1 per cent. For basic consumer goods such as clothing, such a decrease has to be considered significant.

Statistics on retail sales of clothing confirm the preceding findings: from 1981 to 1982 these sales increased 0.8 per cent in current dollars, but decreased 3.5 per cent in constant dollars. (Table 6).

The same table shows also that in the last four years clothing sales in constant dollars, that is on a volume basis, have fluctuated in sawtooth fashion: increased sales in one year have been followed by a decrease in the following year. Thus, after four years, the sales volume has gone up 0.8 per cent only, or an average of 0.2 per cent per year, while population growth has been about one per cent per year.

Final demand for clothing has been practically stationary for several years, and has decreased slightly on a per capita basis. When this stationary final demand is met by a growing proportion of imported clothing, the situation of domestic clothing manfuacturers becomes that much more precarious.

With regard to distribution of sales by type of stores in 1982, once again the specialized clothing store chains have resisted best to the contraction in sales. Their sales volume increased marginally while department stores, and independent clothing stores even more so, saw their sales volume decline. The structural tendency favoring specialized clothing store chains which has been noticeable for several years has thus continued to prevail. As a result the share of total sales of clothing going to these chain stores has increased from 26.1 to 30.8 per cent, while the share of department stores has decreased from 43.6 per cent to 41.7 per cent, and the share of independent stores, from 30.3 to 27.5 per cent. (Table 7).

Average monthly inventories of clothing stores have followed the trend in sales. Overall, the decrease in sales volume of 3.5 per cent in 1982 has been accompanied by a decrease of 1.7 per cent in inventory volumes. Actual reductions in inventories have been particularly significant for independent stores and department stores, amounting to 6.3 and 3.4 per cent respectively, compared to actual respective decreases in sales of 6.7 and 4.1 per cent. It can therefore be concluded that sales volume has evolved in parallel with inventories for these two types of stores. In contrast, inventories of specialized clothing store chains recorded a substantial increase of 8.8 per cent in 1982, while their sales volume showed an increase of 0.3 per cent only. (Table 8).

Table 6

RETAIL SALES OF CLOTHING

Sales in million dollars and changes in per cent

Type of store	Sales					Change				
	1978	1979	1980	1981	1982	1978/77	1979/78	1980/79	1981/80	1982/81
	Current dollars									
Department stores	2,338.2	2,593.1	2,809.4	3,069.3	3,075.7	10.7	10.9	8.3	9.3	0.2
Specialized clothing stores										
— chain	1,399.2	1,606.2	1,822.0	2,169.3	2,273.8	12.7	14.8	13.4	19.1	4.8
— independent	1,621.4	1,803.6	1,915.6	2,088.1	2,035.2	9.7	11.2	6.2	9.0	−2.5
TOTAL	**5,358.8**	**6,002.9**	**6,547.0**	**7,326.7**	**7,384.7**	**10.9**	**12.0**	**9.1**	**11.9**	**0.8**
	1971 dollars[1]									
Department stores	1,651.3	1,673.0	1,619.3	1,655.5	1,587.7	7.1	1.3	−3.2	2.2	−4.1
Specialized clothing stores										
— chain	988.1	1,036.3	1,050.1	1,170.1	1,173.9	9.0	4.9	1.3	11.4	0.3
— independent	1,145.1	1,163.6	1,104.1	1,126.3	1,050.7	6.1	1.6	−5.1	2.0	−6.7
TOTAL	**3,784.5**	**3,872.9**	**3,773.5**	**3,951.9**	**3,812.3**	**7.3**	**2.3**	**−2.6**	**4.7**	**−3.5**

[1] Statistical deflation using the consumer price index for clothing only.
SOURCE: Statistics Canada, Cat. 63-005, 63-014 and 63-210.

Table 7

DISTRIBUTION OF CLOTHING SALES BY TYPE OF STORE

Per cent

Type of store	1978	1979	1980	1981	1982
Department stores	43.6	43.2	42.9	41.9	41.7
Specialized clothing stores:					
— chain	26.1	26.8	27.8	29.6	30.8
— independent	30.3	30.0	29.3	28.5	27.5
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

SOURCE: Table 6.

Table 8

AVERAGE MONTHLY INVENTORIES OF CLOTHING STORES

Inventories in million dollars and changes in per cent

Type of store	Inventories				Change			
	1979	1980	1981	1982	1979/78	1980/79	1981/80	1982/81
	Current dollars							
Department stores	700.8	742.6	843.1	850.9	21.1	6.0	13.5	0.9
Specialized clothing stores								
— chain	358.7	317.9	357.1	406.0	26.1	−11.4	12.3	13.7
— independent	407.2	431.2	502.6	492.2	20.8	5.9	16.6	−2.1
TOTAL	**1,466.7**	**1,491.7**	**1,702.8**	**1,749.1**	**22.2**	**1.7**	**14.2**	**2.7**
	1971 dollars[1]							
Department stores	452.1	428.0	454.7	439.3	10.6	5.3	6.2	−3.4
Specialized clothing stores								
— chain	231.4	183.2	192.6	209.6	15.2	−20.8	5.1	8.8
— independent	262.7	248.5	271.1	254.1	10.3	−5.4	9.0	−6.3
TOTAL	**946.2**	**859.7**	**918.4**	**903.0**	**11.6**	**−9.1**	**6.8**	**−1.7**

[1] Statistical deflation using the consumer price index for clothing only.
SOURCE: Statistics Canada, Cat. 63-005, 63-014 and 63-210.

These stores have obviously gambled on a resurgence of demand at the end of 1982 and in 1983. Furthermore, these stores have always maintained the lowest inventory-to-sales ratio and the inventory buildup in 1982 has not changed this. (Table 9).

Table 9

DISTRIBUTION OF AVERAGE MONTHLY INVENTORIES BY TYPE OF STORE
Per cent

Type of store	1978	1979	1980	1981	1982
Department stores	48.2	47.8	49.8	49.5	48.6
Specialized clothing stores:					
— chain	23.7	24.4	21.3	21.0	23.2
— independent	28.1	27.8	28.9	29.5	28.2
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

SOURCE: Table 8.

During the four years from 1979 to 1982, the inventory-to-sales ratio for specialized clothing store chains was 18.3 per cent, and in 1982, amounted to 17.9 per cent. For department stores, the inventory-to-sales ratio was 27.2 per cent for the years 1979-82, and 27.7 per cent in 1982, while the corresponding ratios for independent stores amounted to 23.2 and 24.2 per cent respectively.

Inventory-to-sales ratios are an indication of the degree of specialization of the three categories of stores. Chain stores are the most specialized in terms of products and price points. Companies active in this trade sector in Canada own several store chains, each catering to specific consumer groups identified by sex, level of income, and sometimes by size range. The degree of specialization is not as great for department and independent stores. These stores often try to attract several groups of consumers with a larger choice of items necessitating much larger inventories.

Clothing sales went through a cyclical reversal in October-November 1982 and have been expanding since then. However, this expansion appears shaky: during the first five months in 1983 the volume of sales went up by 0.8 per cent only compared to the same period in 1982. After three months of satisfactory growth in clothing sales, results in April and May were disappointing, probably because of the climatic conditions. Partial results for the first two summer months confirm a moderate growth in sales.

3 — Production and Employment in the Textile and Clothing Industries

After two years of unsettled activity in 1980 and 1981 the textile and clothing industries were severely hit by the recession in 1982. (Graph 1 and Table 10). Weakness in final demand for textile products and inventory reductions at all levels of production and distribution triggered an accelerated decline in downstream demand: retailers seeing their sales diminish decided to reduce their inventories at least proportionately by decreasing their orders for products to a greater extent than the decrease in sales; clothing manufacturers in turn reduced their inventories of finished products by cutting down their orders with fabric producers to a greater extent than the decline in their sales; fabric producers did the same with regard to yarns. The same procedure was repeated in the same way in numerous other sectors: carpets, upholstery fabrics, household goods, automotive fabrics all shared the same fate as clothing.

In this manner the relatively moderate recession in real consumer income translated itself into increasingly severe recession at each upstream step in the manufacturing process from finished products to raw materials. True, the retail trade suffered from the recession, but it was nothing compared to the impact of the recession on producers of finished textile products, and even less so than the declines in production in weaving, spinning, and particularly fibre and filament production.

Since at the same time imports of finished textile products did not decrease while final demand was declining the magnitude of the drop at each stage of the production cycle became that much greater as a result.

These mechanisms for transmission of cyclical fluctuations help explain why a 3.5 per cent decline in sales volume resulted in a decrease in production of more than 15 per cent in the clothing industry and of more than 21 per cent in the textile industry.

While the acceleration factor aggravates the downward movement, it also acts in the opposite manner when the trend is reversed: increased sales lead to increased inventories at each step of the production cycle and this double increase results in increasingly stronger activity further upstream in the production cycle. The major inventory reductions in 1981 and 1982 following the decline in demand, and the high interest rates lead therefore to expectations of a relatively vigorous recovery, on condition however that the increased demand for finished textile products not be entirely taken up by increased imports.

One method of assessing the severity of the recession is to compare production levels in the recession year with the maximum production level reached in previous years. For all manufacturing industries the peak level in postwar production was reached in 1979. The decreases in production in 1982 will therefore be determined in comparison with the 1979 levels.

Graph 1

INDEXES — SEASONALLY ADJUSTED GROSS DOMESTIC PRODUCT AND ESTIMATED TOTAL EMPLOYMENT

1977 = 100

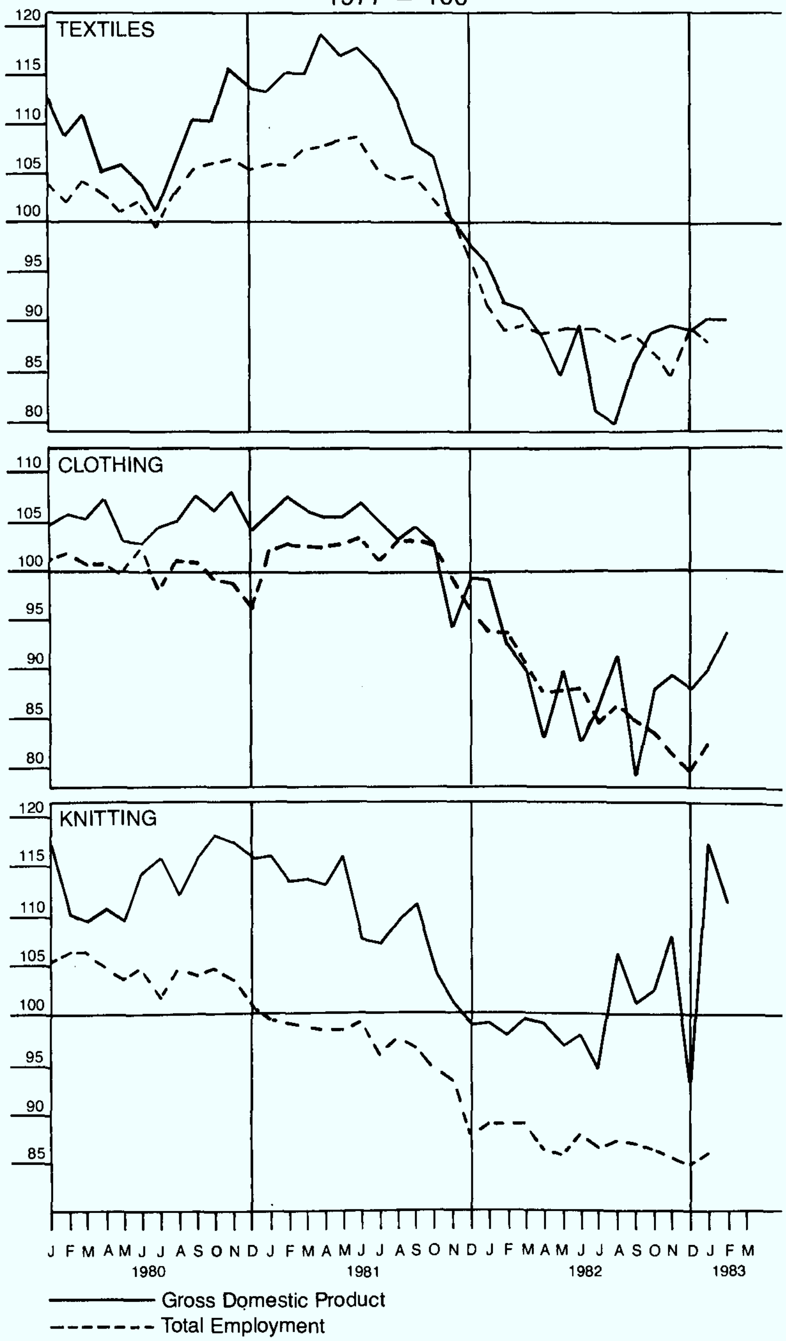

Table 10

ANNUAL VARIATIONS IN PRODUCTION AND EMPLOYMENT IN TEXTILE, CLOTHING AND KNITTING SECTORS

Per cent, compared to previous year

Industry Sector	Real domestic product[1]					Employment 2					Employment 3				
	1978	1979	1980	1981	1982	1978	1979	1980	1981	1982	1978	1979	1980	1981	1982
Textile	5.9	8.5	-4.9	2.1	-21.3	3.0	2.0	-1.5	1.1	-16.0	3.5	1.7	-1.5	1.0	-16.1
Clothing	7.6	6.6	-7.7	-1.9	-15.3	3.7	0.6	-4.2	1.8	-14.8	4.9	0.8	-4.2	1.8	-14.8
Knitting	4.6	5.1	3.6	-4.2	-9.0	0	6.2	-1.9	-7.4	-10.2	-3.4	6.0	0.5	-7.5	-10.2

SOURCE:

1 Statistics Canada, Cat. 61-213 and 61-005.

2 Statistics Canada survey of firms employing 20 or more workers, Cat. 72-002.

3 Statistics Canada, Cat. 31-203 for 1978, 1979 and 1980; 1981 and 1982 estimated by Department of Industry, Trade and Commerce/Regional Economic Expansion, based on Statistics Canada data.

From 1979 to 1982, the index of real domestic product for all manufacturing declined 13.2 per cent, the index for non-durable goods, 9.0 per cent, and for durable goods, 17.6 per cent. During the same period the index decreased 9.8 per cent for knitting, 23.3 per cent for clothing and 23.6 per cent for textiles. (Table 11).

The same table shows that the indices for the three manufacturing groups (manufacturing industries, non-durable goods and durable goods) were 20 per cent higher in 1982 than in 1971 while they remained at approximately the 100 level in both 1971 and 1982 for the three textile sectors.

This table also shows that the bottom in all activities was reached during the second and third quarters of 1982. The situation has been improving since then. Preliminary data for the first five months of 1983 indicate a strong recovery compared to the same period of the preceding year: the index of real domestic product went up 9.9 per cent for the clothing industry, 15.5 per cent for knitting and 19.3 per cent for the textile industry. As a result, part of the decrease experienced in 1982 has already been compensated for during the first half of 1983.

Employment evolves in step with production, but its fluctuations are somewhat more moderate, as shown in Table 12. Between 1981 and 1982, the three textile sectors lost more than 25,000 jobs, and, in relation to 1979, the best recent year, close to 30,000. During the recovery period some of these jobs will be restored, but it is probable that many jobs will have been eliminated permanently. The severe recession in 1982 has resulted in the disappearance of numerous firms, both technologically and financially marginal, which will not come back no matter how strong the present recovery.

Employment generally decreased in 1982 for most groups of textile products. (Table 13). The only exceptions were increases in employment in the two sub-sectors of cotton and polyester-cotton yarns and of towels and washcloths, but these increases were only accidental. Actually, several plants producing these goods were temporarily stopped in late 1981 and their workers laid off while in 1982 these plants were in operation.

The products listed in Table 13 are all subject to special measures of protection against imports. Other products also were not spared by the decline in production and employment: there was a comparable decline for automotive fabrics, upholstery fabrics and carpeting, for which domestic demand had decreased considerably.

With regard to employment in the clothing industry, detailed statistics on the number of employees and hours worked are obtained by the Board from the parity and joint committees of Québec and Ontario. These two provinces account for close to 90 per cent of the employment in this industry in Canada. As shown in Table 14, employment decreased 15 per cent and hours worked close to 20 per cent in Québec, while in Ontario employment remained static

Table 11

INDEX OF REAL DOMESTIC PRODUCT AND PERCENT CHANGE FROM PREVIOUS YEAR

Seasonally adjusted (1971 = 100)

		Textile		Clothing		Knitting		Total manufacturing		Durable		Non-durable	
		Index	%	Index	%	Index	%	Index	%	Index	%	Index	%
1977		120.4	6.4	117.4	−5.4	100.3	−3.9	125.5	1.9	129.8	2.5	121.2	1.5
1978		127.5	5.9	126.3	7.6	104.9	4.6	132.0	5.2	136.2	1.1	127.8	1.1
1979		138.3	8.5	134.6	6.6	110.3	5.1	139.9	6.0	145.0	6.5	134.5	5.2
1980		131.5	−4.9	124.3	−7.7	114.3	3.6	135.7	−3.0	137.7	−5.0	133.6	−0.7
1981		134.3	2.1	122.0	−1.9	109.5	−4.2	138.5	2.1	141.4	2.7	135.5	1.4
1982		105.6	−21.3	103.3	−15.3	99.5	−9.0	121.5	−12.3	119.5	−15.5	123.7	−8.7
1981	January	136.0	0.2	124.1	0.8	116.4	−1.5	136.7	−2.4	138.8	−3.4	134.6	−1.2
	February	138.5	5.3	126.1	1.6	113.7	3.0	139.4	1.4	142.6	1.4	136.1	1.4
	March	138.5	3.4	124.6	1.2	113.8	3.8	141.2	1.4	144.9	2.0	137.4	0.9
	April	144.7	14.2	124.0	−0.5	113.0	2.1	142.6	4.7	147.7	7.4	137.4	1.9
	May	141.0	10.2	124.0	2.4	116.1	6.0	143.4	8.7	148.5	12.4	138.1	4.9
	June	141.8	12.9	125.6	4.3	107.7	−5.9	146.2	10.9	153.9	16.2	138.3	5.4
	July	139.1	13.7	123.6	0.5	107.3	7.8	144.6	9.3	151.6	13.5	137.5	5.0
	August	135.0	5.1	121.3	−1.8	109.1	−2.9	137.2	3.9	139.0	4.1	135.5	3.7
	September	129.7	−2.5	122.6	−3.0	111.1	−4.2	136.4	0.5	136.8	0.6	136.0	1.7
	October	128.3	−3.5	120.3	−3.4	104.2	−12.0	134.1	−1.8	134.1	−3.7	134.1	0.1
	November	120.9	−13.1	110.5	−13.0	101.4	−13.8	130.9	−4.2	130.4	−6.7	131.4	−1.6
	December	117.8	−14.0	116.2	−5.2	98.2	−15.1	129.2	−6.5	128.6	−8.5	129.8	4.3

Table 11 (cont'd)

INDEX OF REAL DOMESTIC PRODUCT AND PERCENT CHANGE FROM PREVIOUS YEAR

Seasonally adjusted (1971 = 100)

		Textile		Clothing		Knitting		Total manufacturing		Durable		Non-durable	
		Index	%	Index	%	Index	%	Index	%	Index	%	Index	%
1982	January	116.0	−14.7	115.5	−6.9	98.5	−15.4	127.3	−6.9	126.4	−8.9	128.3	−4.7
	February	110.9	−19.9	108.1	−14.3	97.8	−14.0	126.4	−9.3	126.1	−11.6	126.7	−6.9
	March	109.5	−20.9	105.5	−15.3	99.4	−12.7	125.1	−11.4	124.3	−14.2	126.0	−8.3
	April	106.6	−26.3	98.1	−20.9	98.4	−12.9	123.2	−13.6	124.5	−15.7	121.8	−11.4
	May	101.9	−27.7	104.8	−15.9	96.9	−16.5	125.3	−12.6	126.2	−15.0	124.4	−9.9
	June	107.1	−24.5	97.7	−22.2	97.8	−9.2	123.0	−15.9	121.9	−20.8	124.2	−10.2
	July	96.8	−30.4	101.2	−18.1	94.7	−11.8	119.7	−17.2	117.9	−22.2	121.6	−11.6
	August	95.5	−29.3	107.3	−11.6	106.6	−2.3	125.3	−8.7	126.4	−9.1	124.2	−8.3
	September	102.8	−20.7	92.4	−24.6	101.1	−9.0	119.7	−12.3	117.3	−14.3	122.3	−10.1
	October	106.7	−16.8	102.2	−15.1	102.2	−1.9	115.1	−14.2	109.0	−18.7	121.5	−9.4
	November	107.4	−11.2	104.0	−5.9	108.1	6.6	115.0	−12.2	108.1	−17.1	122.2	−7.0
	December	107.1	−9.1	102.3	−12.0	92.5	−5.8	113.3	−12.3	106.4	−17.3	120.4	−7.2
1983	January	112.7	−2.8	105.6	−8.6	116.7	18.5	121.3	−4.7	117.0	−7.4	125.7	−2.0
	February*	118.3	6.7	110.8	2.5	110.0	12.5	124.2	−1.7	119.3	−5.4	129.2	2.0
	March*	116.6	6.5	114.2	8.2	107.3	7.9	122.9	−1.8	118.2	−4.9	127.6	1.3
	April*	122.6	15.0	113.3	15.5	120.5	22.5	125.4	1.8	122.1	−1.9	128.7	5.7
	May*	121.6	19.3	115.2	9.9	111.9	15.5	127.0	1.4	126.0	−0.2	128.0	2.9

* Preliminary.

SOURCE: Statistics Canada, Cat. 61-213 and 61-005.

Table 12

ESTIMATED EMPLOYMENT AND PER CENT CHANGE COMPARED TO PREVIOUS YEAR

Thousands of employees and per cent

		Textile		Clothing		Knitting		Total	
		Employees	%	Employees	%	Employees	%	Employees	%
1977		63.2	−4.0	84.8	−3.8	19.4	−8.5	167.4	−4.4
1978		65.1	3.0	87.9	3.7	19.4	0	172.4	3.0
1979		66.4	2.0	88.4	0.6	20.6	6.2	175.4	1.7
1980		65.4	−1.5	84.7	−4.2	20.2	−1.9	170.3	−2.9
1981		66.1	1.1	86.2	1.8	18.7	−7.4	171.0	0.4
1982		55.5	−16.0	73.4	−14.8	16.8	−10.2	145.7	−14.8
1981	January	66.7	1.5	86.4	0.9	19.3	−5.4	172.4	0.4
	February	66.7	3.1	87.3	1.5	19.2	−6.8	173.2	1.1
	March	67.4	2.3	87.0	2.1	19.1	−7.3	173.5	2.6
	April	67.9	4.1	86.8	1.9	19.0	−6.4	173.7	1.8
	May	68.0	6.4	87.1	2.8	19.0	−5.0	174.1	3.3
	June	68.4	6.2	88.0	1.9	19.2	−5.4	175.6	2.7
	July	66.5	6.2	85.5	2.9	18.6	−5.6	170.6	3.1
	August	66.0	1.5	87.6	2.5	18.9	−8.9	172.5	1.0
	September	66.2	−0.5	87.7	2.9	18.7	−7.0	172.6	0.5
	October	64.8	−3.1	86.5	3.0	18.3	−9.4	169.6	−0.9
	November	63.4	−5.5	83.9	0.7	18.0	−10.4	165.3	−3.0
	December	61.0	−8.1	81.2	−0.9	16.9	−13.8	159.1	−5.2

Table 12 (cont'd)

ESTIMATED EMPLOYMENT AND PER CENT CHANGE COMPARED TO PREVIOUS YEAR

Thousands of employees and per cent

		Textile		Clothing		Knitting		Total	
		Employees	%	Employees	%	Employees	%	Employees	%
1982	January	58.0	−13.0	79.4	−8.1	17.2	−10.9	154.6	−10.3
	February	56.0	−16.0	79.4	−9.0	17.2	−10.4	152.6	−11.9
	March	56.2	−16.6	76.6	−12.0	17.2	−9.9	150.0	−13.5
	April	55.8	−17.8	74.0	−14.7	16.6	−12.6	146.4	−15.7
	May	56.0	−17.6	74.1	−14.9	16.5	−13.2	146.8	−15.7
	June	56.1	−18.0	74.3	−15.6	17.0	−11.5	147.4	−16.1
	July	54.5	−18.0	71.8	−16.0	16.6	−10.7	142.9	−16.2
	August	55.4	−16.1	72.6	−17.1	16.8	−11.1	144.8	−16.1
	September	55.7	−15.9	71.7	−18.2	16.7	−10.7	144.1	−16.5
	October*	54.8	−15.4	70.7	−18.3	16.6	−9.3	142.1	−16.2
	November*	53.4	−15.8	68.8	−18.0	16.3	−9.4	138.5	−16.2
	December*	54.5	−10.7	66.8	−17.7	16.4	−3.0	137.7	−13.5
1983	January*	55.2	−4.8	69.7	−12.2	16.5	−4.1	141.4	−8.5

*Preliminary.

SOURCE: Statistics Canada, Cat. 72-002, survey of firms employing 20 or more workers.

Table 13

TEXTILE SUB-SECTORS, VARIATIONS IN DOMESTIC SHIPMENTS AND EMPLOYMENT FROM 1981 TO 1982
Per cent

Sub-sectors	Domestic shipments (net of exports)	Employment
Yarns		
Worsted spun acrylic yarns	−2.2	−9.4
Cotton and polyester-cotton yarns	12.3	30.2
Nylon filament yarns	−21.2)	
Polyester filament yarns	−28.9)	−16.0
Acetate rayon filament yarns	−24.2)	
Fabrics		
Woollen and worsted fabrics	−23.3	−20.0
Cotton and polyester-cotton fabrics, corduroys and denims	−32.6	−48.0
Coated fabrics	−12.7	−33.4
Man-made fabrics (rayon, nylon and polyester)	−10.4	−18.1
Products		
Towels and washcloths	−6.1	5.4
Sheets and pillowcases	−9.2	−3.1
Handbags	−10.4*	−7.0*
Hosiery	3.1	−1.3
Cordage, rope and twine	−10.7	−23.2
Work gloves	−31.9	−21.6

*Estimate.
SOURCE: Textile and Clothing Board.

and hours worked decreased only 8.5 per cent. As mentioned by the Board in its preceding annual reports these statistics indicate that beyond cyclical fluctuations redistribution of production activity has been taking place for several years: firms are established or relocated in Ontario to the detriment of Québec.

As a result, between 1979 and 1982 employment in Ontario increased 11.3 per cent in the women's dresses and sportswear sector, 27.2 per cent in the women's cloaks and suits sector, and decreased 21.3 per cent in the men's and boys' clothing sector. Between the same two years, employment in Québec declined 24.4 per cent in the women's clothing sector, 24.8 per cent in the men's and boys' clothing sector and 40.7 per cent in the men's and boys' shirt sector. According to these data, the geographic displacement appears to be significant in the women's clothing sector.

Table 14

AVERAGE NUMBER OF EMPLOYEES AND HOURS WORKED IN THE MEN'S AND WOMEN'S CLOTHING SECTORS (QUEBEC, ONTARIO) AND IN THE SHIRT SECTOR (QUEBEC)
1981 and 1982

Province	Year	Average number employees	Hours worked		
			Regular	Overtime	Total
Québec					
(Men's and boys' clothing, women's and girls' clothing, shirts)	1981	37,328	51,896,672	807,320	52,703,992
	1982	31,714	41,739,428	518,129	42,257,557
	1982/ 1981	−15.0%	−19.6%	−35.8%	−19.8%
Ontario					
(Men's and boys' clothing, women's and girls' clothing)	1981	7,438	11,298,246	559,002	11,857,248
	1982	7,435	10,325,863	527,172	10,853,035
	1982/ 1981	−0.04%	−8.6%	−5.7%	−8.5%
Total, Québec and Ontario	1981	44,766	63,194,918	1,366,322	64,561,240
	1982	39,149	52,065,291	1,045,301	53,110,592
	1982/ 1981	−12.5%	−17.6%	−23.5%	−17.7%

SOURCE: Parity and Joint Committees for Québec and Ontario

To place the situation of the textile and clothing industries in a longer perspective, production and employment statistics in 1982 were compared to those for 1977, the year when employment was at its lowest level since 1971, and to those for 1973, the year when employment reached its highest peak since World War II. (Table 15).

Table 15

TOTAL VARIATIONS IN REAL DOMESTIC PRODUCT AND EMPLOYMENT IN THE TEXTILE, CLOTHING AND KNITTING SECTORS BETWEEN 1977 AND 1982, AND BETWEEN 1973 AND 1982
Per cent

	1977 – 1982		1973 – 1982	
Sectors	**RDP**	**Employment**	**RDP**	**Employment**
Textile	−12.3	−12.2	−11.4	−25.2
Clothing	−12.0	−12.2	−9.7	−20.1
Knitting	−0.8	−14.6	−11.2	−32.0

SOURCE: Statistics Canada, Cat. 61-213, 31-203, and Department of Industry, Trade and Commerce/Regional Economic Expansion.

Production and employment levels in 1982 were below those of both 1977 and 1973. Since a recession usually results in a greater decline in production than in employment, there have been no productivity gains per employee between 1977 and 1982 in textiles and clothing. However there have been gains in knitting, a sector whose difficulties started much earlier and which had to adjust to a declining demand by systematically reducing its employment. In comparing data for the years 1973 and 1982 it appears nevertheless that in the longer term substantial productivity gains have been realized: in the three textile sectors the decrease in employment has been two to three times greater than the decrease in production.

4 — Capacity Utilization and Productivity

As mentioned in previous annual reports, the degree of utilization of production capacity is first of all an indicator of the economic situation in each industry sector. It is also an approximate indicator of how profitably fixed assets are utilized. Finally, capacity utilization can be used to estimate changes in production capacity itself.

As an indicator of the economic situation, the data in Table 16 show that in 1982 all three textile sectors experienced a substantial decline in utilization of their production capacities. Capacity utilization in the textile and clothing sectors reached only about 70 per cent, that is by far the least favorable capacity utilization of the last six years.

Table 16

CAPACITY UTILIZATION AND REAL DOMESTIC PRODUCT FOR THE TEXTILE, CLOTHING AND KNITTING SECTORS

	1977	1978	1979	1980	1981	1982
Textile						
Capacity utilization in per cent	90.0	92.6	98.5	91.3	91.3	70.0
Index of capacity utilization 1977 = 100	100.0	102.9	109.4	101.4	101.4	77.8
Index of real domestic product 1977 = 100	100.0	105.9	114.9	109.2	111.5	87.7
Clothing						
Capacity utilization in per cent	88.7	93.1	96.9	88.4	85.6	71.9
Index of capacity utilization 1977 = 100	100.0	105.0	109.2	99.7	96.5	81.1
Index of real domestic product 1977 = 100	100.0	107.6	114.7	105.9	103.9	88.0
Knitting (Fabrics and clothing)						
Capacity utilization in per cent	85.7	89.6	94.0	97.7	93.4	85.7
Index of capacity utilization 1977 = 100	100.0	104.5	109.7	114.0	109.0	100.0
Index of real domestic product 1977 = 100	100.0	104.6	110.0	114.0	109.2	99.2

SOURCE: Department of Industry, Trade and Commerce/Regional Economic Expansion and Statistics Canada, Cat. 61-213.

Such a low degree of capacity utilization necessarily leads to decreased or negative profitability in the utilization of fixed assets. The most capital intensive industry sectors will therefore be the most seriously affected. It should not be surprising, then, that the largest textile firms in Canada were the ones which had record operating deficits. On the other hand, for a number of other reasons, bankruptcies were multiplied among the smaller firms.

Even with the considerable decline in capacity utilization, there was a slight increase in installed capacity in 1982. Compared to 1981, this increase amounted to 2.4 per cent for the textile sector and 0.8 per cent for the clothing sector. There was no appreciable increase for the knitting sector. In a year as depressed as 1982, such minor increases in installed capacity are an involuntary result of the modernization process: since the new equipment acquired is generally much more productive than the older one which it replaces this will usually give rise to an increase in production capacity.

In a recession as profound as that of 1982, only the value added per hour worked is a valid measure of productivity. In effect, there is less flexibility in the number of employees than in the number of hours worked since firms do not want to let their employees go for fear of not being able to find them again for the expansion period which usually follows. This behaviour has this time again been encouraged by the federal work sharing program with the result that there were fewer lay-offs. Only the textile sector, the most seriously affected and the most capital intensive has experienced a marginal decrease in productivity in 1981, in terms of value added per hour worked. In the clothing and knitting sectors the value added per hour worked has made a significant jump. (Table 17). Such an unexpected result is likely attributable to the fact that the firms have had their most productive equipment operated by their most experienced employees. It is also possible that uncertainties about job security have contributed to greater work efficiency.

Nevertheless, it must be pointed out that in 1982 the levels achieved in terms of value added per hour worked in the clothing and knitting sectors have been clearly superior to those for all manufacturing.

Among the clothing sub-sectors and over the five-year period from 1977 to 1982 it is the children's clothing sub-sector which has realized the most rapid increase in productivity. With an average annual growth rate in productivity of 8.2 per cent, this industry sub-sector has progressed at almost double the rate for the men's clothing sub-sector (4.3 per cent) and at more than four times that for the women's clothing sub-sector (1.8 per cent). This latter sub-sector is evidently not one which lends itself readily to extensive standardization and mechanization. Style changes are numerous and production runs relatively short in this sub-sector.

During the same five-year period the whole clothing sector has achieved a productivity increase of 3 per cent per year while for total manufacturing the yearly increase did not exceed 2.2 per cent (Table 18). The knitting sector achieved the remarkable rate of 4.7 per cent and the textile sector has had to be satisfied with a more modest rate of 1.4 per cent. In fact, the textile sector has experienced three difficult years in succession, and the only appreciable increase in productivity occurred from 1978 to 1979 when production volumes increased significantly. Since then production has declined and productivity has remained stationary.

Since the data on real domestic product and on real value added per hour worked are important in assessing the situation and the dynamism of respective industry sectors, it must be pointed out that the data given in this report differ considerably from the data for the same years published in last year's report. In fact, since then Statistics Canada has effected a substantial revision of its data on real domestic product, with a resultant upward adjustment since 1979. As a result, data on production and productivity now present a more favorable picture than in the preceding report. With regard to 1982 results compared to the revised years, they indicate a substantial decline in produc-

Table 17

INDEX OF REAL DOMESTIC PRODUCT AND VALUE ADDED PER MAN-HOUR WORKED IN THE TEXTILE, CLOTHING AND KNITTING SECTORS AND IN TOTAL MANUFACTURING

1977 = 100

Sectors	1978 RDP	1978 VA per M-HR	1979 RDP	1979 VA per M-HR	1980 RDP	1980 VA per M-HR	1981 RDP	1981 VA per M-HR	1982 RDP	1982 VA per M-HR
Textile	105.9	101.3	114.9	107.9	109.2	107.0	111.5	108.1	87.7	107.3
Clothing	107.6	103.8	114.7	110.0	105.9	108.1	103.9	105.9	88.0	116.0
Knitting	104.6	105.8	110.0	104.5	114.0	113.3	109.2	117.5	99.2	126.0
Total manufacturing	**105.2**	**101.5**	**111.5**	**104.2**	**108.1**	**105.9**	**110.4**	**108.9**	**96.8**	**111.6**

SOURCE: Statistics Canada, Cat. 61-213 and 72-002.

Table 18

GROWTH IN REAL VALUE ADDED PER MAN-HOUR WORKED IN THE TEXTILE, CLOTHING AND KNITTING SECTORS AND IN TOTAL MANUFACTURING, 1977 TO 1982

Average annual growth rates in per cent

Sectors	Growth Rate
Textile	1.4
Clothing	3.0
Women's clothing	1.8
Men's clothing	4.3
Children's clothing	8.2
Knitting	4.7
Total manufacturing	**2.2**

SOURCE: Statistics Canada, Cat. 61-213 and 72-002.

tion but, for the textile industries, a well maintained productivity. Ulterior revision of these data should not materially modify the overall impression that they provide at present.

5 — Evolution of Hourly Wages and Prices

The difficulties experienced by the textile industries in 1982 have had a depressing effect on salaries and prices. While average hourly earnings in manufacturing industries increased 11.7 per cent in 1982 compared to 1981, the increase amounted to only 10.5 per cent in the textile sector, 8.3 per cent in clothing and 4.4 per cent only in knitting. As a result, average hourly earnings in the textile industries once more have declined in terms of percentage of average hourly earnings in all manufacturing. (Table 19)

Such a situation is not surprising. Textile industries in general are subjected to very strong competitive pressures from imports, and the clothing and knitting sectors, where small and medium size firms dominate, engage in fierce competition in the domestic market. When sales and production are lower, as was the case in 1982, the competition of imported products and of domestic producers among themselves becomes even fiercer and producers must exert rigorous control of their costs to remain competitive. This is why wages have been increasing less in these sectors than elsewhere. Furthermore, even if there is an increase in wage costs, this increase will be reflected only partially in the selling price of the product.

With regard to wages, it should be noted that in the textile industries they will generally be inferior to the average wages paid in total manufacturing. It

Table 19

AVERAGE HOURLY EARNINGS IN THE TEXTILE, CLOTHING AND KNITTING SECTORS AND IN ALL MANUFACTURING, AND RATE OF INCREASE OVER THE SAME PERIOD OF THE PREVIOUS YEAR

In current dollars and in per cent

	Textiles		Clothing		Knitting		All manufacturing	
Period	**$**	**%**	**$**	**%**	**$**	**%**	**$**	**%**
1979								
Quarter I	5.70	8.2	4.84	7.1	4.54	8.4	7.19	7.8
II	5.94	10.6	4.95	8.6	4.58	5.5	7.37	8.9
III	6.01	9.7	5.04	8.4	4.67	6.9	7.50	9.2
IV	6.09	8.9	5.10	7.6	4.68	6.6	7.68	9.2
Year 1979	5.94	9.4	4.98	7.8	4.62	6.9	7.44	8.8
1980								
Quarter I	6.33	11.1	5.23	8.1	4.92	8.4	7.90	9.9
II	6.38	7.4	5.31	7.3	4.92	7.4	8.06	9.4
III	6.60	9.8	5.38	6.7	5.11	9.4	8.25	10.0
IV	6.76	11.0	5.41	6.1	5.32	13.7	8.54	11.2
Year 1980	6.52	9.8	5.33	7.0	5.07	9.7	8.19	10.1
1981								
Quarter I	7.04	11.2	5.58	6.7	5.45	10.8	8.78	11.1
II	7.01	9.9	5.69	7.2	5.53	12.4	9.07	12.5
III	7.12	7.9	5.83	8.4	5.59	9.4	9.22	11.8
IV	7.25	7.2	5.94	9.8	6.40	20.3	9.61	12.5
Year 1981	7.11	9.0	5.76	8.1	5.74	13.2	9.17	12.0
1982								
Quarter I	7.67	8.9	6.11	9.5	5.82	6.8	9.93	13.1
II	7.81	11.4	6.24	9.7	5.98	8.1	10.16	12.0
III	7.93	11.4	6.28	7.7	6.09	8.9	10.32	11.9
IV	8.01	10.5	6.32	6.4	6.08	5.0	10.55	9.8
Year 1982	7.86	10.5	6.24	8.3	5.99	4.4	10.24	11.7
in per cent of weekly earnings of all manufacturing								
1978		79.4		67.5		63.2		100.0
1979		79.8		66.9		62.1		100.0
1980		79.6		65.1		61.9		100.0
1981		77.5		62.8		62.6		100.0
1982		76.8		60.9		58.5		100.0

SOURCE: Statistics Canada, Cat. 72-002.

has already been mentioned in the 1981 Report that this difference is accounted for in great part by the high proportion of women employed in the textile sectors and the relatively low level of training generally required for textile employment.

Table 20 presents, among other data, a listing of economic activities with a high proportion of female employment (more than 40 per cent). These activities are listed in decreasing order of the proportion of female employment in total employment in December 1982. This Table also shows the proportion of female employment in total employment in December 1973 and December 1982; average weekly earnings in November 1973 and November 1982; and the ranking of activities according to weekly earnings in November 1982[1]. Although female employment in textile sub-sectors does not reach 40 per cent, these sub-sectors have been included in the Table to present a more complete picture.

Table 20 shows that employment in activities related to textiles are not the most poorly remunerated. Numerous service activities, probably the only ones where total employment increased from 1973 to 1982, remunerate their employees at rates clearly inferior to those in the textile industries. Other service activities, such as insurance carriers, advertising and telephone services provide relatively high earnings, but employment in these activities requires a level of training superior to that of women in textile activities. Finally, the Table also shows that in a recession, female employment is the first to be cut back, since typical female employment is that of machine operator, a job which becomes redundant when production diminishes, and since the application of seniority clauses often does not favour women.

It should also be noted that this Table tends to underestimate certain earnings, for example those of the retail trade sector, since the Table does not take into account the number of hours worked each week, since not enough data is available.

The economic recession affected prices more than wages. While the overall industry selling price index went up by 6 per cent in 1982, industry selling price indices for textile products generally increased much less rapidly. In certain cases these prices even went down or remained stable in spite of the inflationary pressures which prevailed. (Table 21).

The behaviour of industry selling prices of textile products at the various stages of the production cycle is typical of a period of recession. In general, yarn prices have declined, except those for man-made yarns which have increased slightly as a result of the major price increase in raw materials, that is

[1] For data on average weekly earnings, November has been selected in preference to December because the latter includes seasonal elements for hours worked which would introduce distortions in the comparisons. In effect, because of the holiday period, the number of days and hours of work are reduced in manufacturing industries, whereas in the retailing trade the holiday period is preceded by many days of longer store opening hours.

Table 20

ECONOMIC ACTIVITIES WITH A HIGH PROPORTION OF FEMALE EMPLOYMENT, PROPORTION OF FEMALE EMPLOYMENT IN TOTAL EMPLOYMENT, TOTAL EMPLOYMENT AND AVERAGE WEEKLY EARNINGS

1973 and 1982

	Proportion of female employment in per cent of total employment		Total employment, thousand employees		Average weekly earnings dollars		Rank in terms of earnings, ascending order
	Dec. 73	Dec. 82	Dec. 73	Dec. 82	Nov. 73	Nov. 82	Nov. 82
Children's clothing	77.4	66.4	6.3	4.7	102.34	228.32	7
Savings and credit institutions	n.a.*	63.5	n.a.*	215.2	n.a.*	393.23	19
Women's clothing	77.4	63.2	32.4	26.0	101.93	250.81	10
Hosiery	65.4	59.4	6.1	4.5	110.75	263.09	13
Rubber footwear	39.3	54.6	2.4	1.4	120.24	278.64	14
Men's clothing	72.0	52.0	40.2	30.5	106.62	237.18	8
Knitting (except hosiery)	58.8	50.8	16.3	11.5	113.52	261.60	12
Insurance carriers	51.3	50.3	70.7	95.6	167.90	401.03	20
Advertising	49.8	50.1	6.7	7.2	177.32	422.84	21
Laundries and cleaners	60.1	49.9	16.3	14.9	98.38	225.78	6
Luggage, handbags and small leather goods	57.6	47.5	6.3	3.7	112.35	258.47	11
Apparel and shoe stores	67.8	46.9	44.5	64.0	86.70	175.73	3
Department stores	57.0	46.8	184.7	171.1	97.61	214.51	5
Shoes (except rubber)	57.6	46.5	16.3	10.9	109.18	249.85	9
Hotels, restaurants and taverns	50.1	45.2	167.0	255.9	80.45	161.11	1
Telephone services	45.9	44.1	80.4	107.6	182.12	483.34	23
Motion pictures and film exchanges	48.3	43.0	7.9	8.2	82.06	178.15	4
Variety stores	72.5	42.3	42.6	52.3	79.88	172.86	2

Table 20 (cont'd)

ECONOMIC ACTIVITIES WITH A HIGH PROPORTION OF FEMALE EMPLOYMENT, PROPORTION OF FEMALE EMPLOYMENT IN TOTAL EMPLOYMENT, TOTAL EMPLOYMENT AND AVERAGE WEEKLY EARNINGS

1973 and 1982

	Proportion of female employment in per cent of total employment		Total employment, thousand employees		Average weekly earnings dollars		Rank in terms of earnings, ascending order
	Dec. 73	Dec. 82	Dec. 73	Dec. 82	Nov. 73	Nov. 82	Nov. 82
Cotton yarn and cloth	32.8	26.4	13.1	9.5	131.99	341.05	(17)
Wool yarn and cloth	34.5	32.2	7.5	3.3	122.11	348.56	(18)
Synthetic spun yarn and fabrics	29.2	22.7	10.4	6.9	132.80	330.44	(15)
Filament yarn and staple fibres	19.6	9.8	6.6	4.8	162.60	465.06	(22)
Miscellaneous textiles	53.9	29.0	14.2	14.6	143.99	337.26	(16)

*Not available

SOURCE: Statistics Canada, Cat. 72-002.

Table 21

INCREASE IN INDUSTRY SELLING PRICES OF TEXTILE PRODUCTS

Per cent per annum

Products	1979	1980	1981	1982
Cotton yarns	12.5	10.2	9.4	−4.5
Polyester-cotton yarns	10.1	15.0	11.3	−5.5
Wool yarns	19.1	10.8	8.7	n.a.*
Man-made yarns	14.3	18.7	12.0	3.6
Cotton fabrics (for apparel)	9.9	8.2	11.2	0.5
Cotton and man-made fibre blend sheets	15.2	15.3	11.7	3.1
All wool worsted fabrics (for clothing)	13.6	3.0	12.8	0.5
Wool-polyester blend fabrics	10.6	2.8	15.5	1.8
Man-made fibre fabrics	n.a.*	13.9	13.9	8.0
Hosiery	7.1	9.9	6.7	8.4
Knitted fabrics	12.9	7.0	6.3	2.4
Knitted garments	9.4	9.6	10.5	6.7
Men's clothing	10.0	11.8	8.8	7.2

*Not available.
SOURCE: Statistics Canada, Cat. 62-011.

petroleum and natural gas. Fabric prices have remained relatively stable with the exception of man-made fibre fabrics which have followed the evolution of prices for yarns of the same type. In contrast, garment prices have continued to increase at a fairly high rate of 6 to 8 per cent, because their prices follow those of fabrics but with a time lag of at least six months, and because part of the increase in wages is regularly passed down to consumers.

In 1982 the overall consumer price index increased 10.8 per cent while the clothing price index (excluding footwear, accessories and services) increased 5.0 per cent, or less than half the increase in the overall price index. (Table 22). For three years now the clothing price index has been in creasing less rapidly than the overall consumer price index. Data for the first quarter of 1983 confirm the continuation of a slower rate of increase for clothing prices. The latter have increased 4.4. per cent in comparison with the first quarter of 1982, while the overall index went up 7.7 per cent during the same period.

As in the past, the contribution of clothing prices to general price inflation has therefore remained modest. This modest contribution is the result of strong domestic and international competition leading domestic producers and retailers to apply rigorous controls over their prices, often at the expense of profitability.

Table 22

CONSUMER PRICE INDICES
Annual increases in per cent

Product groups	1979	1980	1981	1982	First quarter 1983/82
Apparel only (excludes footwear, accessories and services)	9.3	12.0	6.9	5.0	4.4
Women's clothing[1]	10.3	13.3	6.3	4.2	4.0
Girls' clothing[1]	8.8	10.4	6.8	5.2	4.4
Men's clothing[1]	8.5	10.8	7.3	4.0	4.8
Boys' clothing[1]	7.8	9.8	8.1	6.5	5.1

[1] Clothing includes footwear and accessories, and excludes services.
SOURCE: Statistics Canada, Cat. 62-001 and Department of Industry, Trade and Commerce/Regional Economic Expansion.

6 — Investments in the Textile and Clothing Sectors

In a recession year such as 1982 there is very little motivation to invest. Firstly, incomes decline, making more difficult the financing of new investments, and secondly, there is too much unused production capacity to justify adding to this capacity. Under these conditions it is not surprising to find that in 1982 actual investments remained below stated investment intentions. (Table 23).

The decrease in actual expenditures compared to planned expenditures has been considerable in the clothing and knitting sectors. Actual capital expenditures in these two sectors amounted to only 70 per cent of planned expenditures. Actual expenditures for new buildings and new machinery and equipment amounted only to 50 and 80 per cent respectively of planned expenditures. These are the largest differences in recent years between planned and actual expenditures.

In contrast, actual capital expenditures in the textile sector exceeded planned expenditures in 1982. This was much more the case for expenditures for new machinery and equipment than for repair expenditures. Obviously, the textile sector preferred buying new equipment rather than overhauling older equipment.

These differences between planned expenditures and actual expenditures in 1982, negative in one case and positive in the other, highlight the difference in attitude regarding investments of the clothing and knitting sectors on one hand, and the textile sector on the other.

Table 23

CAPITAL EXPENDITURES BY THE TEXTILE, CLOTHING AND KNITTING SECTORS IN 1982 PLANNED EXPENDITURES IN JULY 1982 AND ACTUAL EXPENDITURES IN MILLION CURRENT AND 1971 DOLLARS

	Current dollars			1971 dollars		
	Planned	Actual	Per cent difference	Planned	Actual	Per cent difference
TEXTILES						
Capital expenditures on new buildings	21.5	22.6	+5.1	7.8	8.4	+7.7
Capital expenditures on new machinery and equipment	132.0	138.9	+5.2	49.9	53.3	+6.8
Total capital expenditures on buildings	37.8	38.2	+1.0	13.7	14.1	+2.9
Total capital expenditures on machinery and equipment	232.8	215.8	−7.3	88.1	82.9	−5.9
CLOTHING						
Capital expenditures on new buildings	10.3	6.3	−38.8	3.7	2.2	−40.5
Capital expenditures on new machinery and equipment	22.4	15.3	−31.7	8.5	5.9	−30.6
Total capital expenditures on buildings	12.2	9.7	−20.5	4.4	3.6	−18.2
Total capital expenditures on machinery and equipment	30.7	22.5	−26.7	11.6	8.6	−25.9

Table 23 (cont'd)

CAPITAL EXPENDITURES BY THE TEXTILE, CLOTHING AND KNITTING SECTORS IN 1982 PLANNED EXPENDITURESIN JULY 1982 AND ACTUAL EXPENDITURES IN MILLION CURRENT AND 1971 DOLLARS

	Current dollars			1971 dollars		
	Planned	Actual	Per cent difference	Planned	Actual	Per cent difference
KNITTING						
Capital expenditures on new buildings	5.9	1.7	−71.2	2.1	0.6	−71.4
Capital expenditures on new machinery and equipment	13.6	12.8	−5.9	5.1	4.9	−3.9
Total capital expenditures on buildings	8.2	3.4	−58.5	3.0	1.3	−56.7
Total capital expenditures on machinery and equipment	20.7	18.7	−9.7	7.8	7.2	−7.7
TOTAL, ALL THREE SECTORS						
Capital expenditures on new buildings	37.7	30.6	−18.8	13.7	11.3	−17.5
Capital expenditures on new machinery and equipment	168.0	167.0	−0.6	63.6	64.1	+0.8
Total capital expenditures on buildings	58.2	51.3	−11.9	21.2	19.0	−10.4
Total capital expenditures on machinery and equipment	284.2	257.0	−9.6	107.5	98.7	−8.2

SOURCE: Statistics Canada, Cat. 61-205 and 61-206.

The first two sectors are dominated by small and medium size firms depending for the most part on internally generated funds for their investments. When sales of these firms decline, there are not enough of their own funds to make capital expenditures. If at the same time, as was the case in 1982, bank credit is scarce and expensive, short term loans are better used in financing current operations than in tying them up in longer term fixed investments.

In contrast, the textile sector is made up of a number of large and very large firms whose financial autonomy is sufficient to allow them to program investments over the medium and long term. Many textile firms have set up five-year plans for the renewal of their equipment, and follow these plans as closely as possible. Moreover, textile machines, which are both very specialized and relatively expensive, are built to order, with waiting lists of 12, 18 or 24 months. Under these conditions a firm will relinquish its position on the waiting list only in case of absolute necessity, since to do so would introduce considerable delay in the modernization of its equipment.

Although 1982 was only the first full year of operation of the Canadian Industrial Renewal Board, it is possible that the existence of this agency and its acceptance in principle of some large modernization projects in the textile industry has contributed to a greater degree of confidence in this industry and helped to accelerate its modernization process.

Investment projects for 1983 also reflect the difference in economic situation of the three major textile activities. In the textile and knitting sectors, planned capital expenditures increased in terms of both current and constant dollars in comparison with 1982. The recovery in these two sectors since the end of 1982 appears to be assured. In contrast, planned capital expenditures for the clothing sector continued to decline in 1983 in current dollars, and even more so in constant dollars, because this industry sector still has doubts about the strength and duration of the recovery. There have been encouraging signs from the domestic market for this sector. However a considerable increase in clothing imports in the first months of 1983 is having an opposite effect. (Tables 24 and 25). With an uncertain future facing it, the clothing sector apparently prefers to postpone its investments.

Tableau 24

CAPITAL EXPENDITURES BY THE TEXTILE, CLOTHING AND KNITTING SECTORS[1]

Expenditures in million current dollars and indices (1978 = 100)

	Capital expenditures						Indices					
	1978	1979	1980	1981	1982	1983	1978	1979	1980	1981	1982	1983
TEXTILES												
Capital expenditures on new buildings	17.3	15.4	20.0	20.9	22.6	23.5	100	89	116	121	131	136
Capital expenditures on new machinery and equipment	77.7	93.9	144.0	142.9	138.9	148.3	100	121	185	184	179	191
Total capital expenditures on buildings	28.4	26.0	34.4	39.9	38.2	38.6	100	92	121	140	135	136
Total capital expenditures on machinery and equipment	133.5	161.3	227.1	241.3	215.8	230.7	100	121	170	181	162	173
CLOTHING												
Capital expenditures on new buildings	8.9	5.9	5.2	13.1	6.3	3.1	100	66	58	147	71	35
Capital expenditures on new machinery and equipment	17.2	20.2	27.7	24.1	15.3	14.6	100	117	161	140	89	85
Total capital expenditures on buildings	11.0	8.5	8.0	15.8	9.7	6.1	100	77	73	144	88	55
Total capital expenditures on machinery and equipment	26.3	27.6	39.1	32.0	22.5	21.9	100	105	149	122	86	83

Table 24 (cont'd)

CAPITAL EXPENDITURES BY THE TEXTILE, CLOTHING AND KNITTING SECTORS[1]

Expenditures in million current dollars and indices (1978 = 100)

	Capital expenditures						Indices					
	1978	1979	1980	1981	1982	1983	1978	1979	1980	1981	1982	1983
KNITTING												
Capital expenditures on new buildings	1.2	2.6	5.7	3.1	1.7	6.4	100	217	475	258	142	533
Capital expenditures on new machinery and equipment	10.1	13.1	21.4	13.9	12.8	15.6	100	130	212	138	127	154
Total capital expenditures on buildings	2.3	4.2	8.1	5.1	3.4	8.4	100	183	352	222	148	365
Total capital expenditures on machinery and equipment	15.3	18.7	28.3	19.8	18.7	22.4	100	122	185	129	122	146
TOTAL, ALL THREE SECTORS												
Capital expenditures on new buildings	27.4	23.9	30.9	37.1	30.6	33.0	100	87	113	135	112	120
Capital expenditures on new machinery and equipment	105.0	127.2	193.1	180.9	167.0	178.5	100	121	184	172	159	170
Total capital expenditures on buildings	41.7	38.7	50.5	60.8	51.3	53.1	100	93	121	146	123	127
Total capital expenditures on machinery and equipment	175.1	207.6	294.5	273.1	257.0	275.0	100	119	168	156	147	157

[1] 1978 – 1981, actual; 1982, preliminary actual; 1983, mid-year revision.

SOURCE: Statistics Canada, Cat. 61-205 and 61-206.

Table 25

CAPITAL EXPENDITURES BY THE TEXTILE, CLOTHING AND KNITTING SECTORS[1]

Expenditures in million 1971 dollars and indices (1978 = 100)

	Capital expenditures						Indices					
	1978	**1979**	**1980**	**1981**	**1982**	**1983**	**1978**	**1979**	**1980**	**1981**	**1982**	**1983**
TEXTILES												
Capital expenditures on new buildings	9.2	7.8	9.0	8.4	8.4	8.5	100	85	98	91	91	92
Capital expenditures on new machinery and equipment	44.5	47.7	66.4	59.0	53.3	55.8	100	107	149	133	120	125
Total capital expenditures on buildings	15.2	13.1	15.5	16.1	14.1	13.9	100	86	102	106	93	91
Total capital expenditures on machinery and equipment	76.5	82.0	104.7	99.7	82.9	86.9	100	107	137	130	108	114
CLOTHING												
Capital expenditures on new buildings	4.8	3.0	2.3	5.3	2.2	1.1	100	63	48	110	46	23
Capital expenditures on new machinery and equipment	9.9	10.3	12.8	10.0	5.9	5.5	100	104	129	101	60	56
Total capital expenditures on buildings	5.9	4.3	3.6	6.4	3.6	2.2	100	73	61	108	61	37
Total capital expenditures on machinery and equipment	15.1	14.0	18.0	13.2	8.6	8.2	100	93	119	87	57	54

CAPITAL EXPENDITURES BY THE TEXTILE, CLOTHING AND KNITTING SECTORS[1]

Expenditures in million 1971 dollars and indices (1978 = 100)

	Capital expenditures						Indices					
	1978	1979	1980	1981	1982	1983	1978	1979	1980	1981	1982	1983
KNITTING												
Capital expenditures on new buildings	0.6	1.3	2.6	1.3	0.6	2.3	100	217	433	217	100	383
Capital expenditures on new machinery and equipment	5.8	6.7	9.9	5.7	4.9	5.9	100	116	171	98	84	102
Total capital expenditures on buildings	1.2	2.1	3.7	2.1	1.3	3.0	100	175	308	175	108	250
Total capital expenditures on machinery and equipment	8.8	9.5	13.0	8.2	7.2	8.4	100	108	148	93	82	95
TOTAL, ALL THREE SECTORS												
Capital expenditures on new buildings	14.6	12.1	14.0	15.0	11.3	11.9	100	83	96	103	77	82
Capital expenditures on new machinery and equipment	60.2	64.7	89.0	74.7	64.1	67.2	100	107	148	124	106	112
Total capital expenditures on buildings	22.3	19.5	22.8	24.6	19.0	19.1	100	87	102	110	85	86
Total capital expenditures on machinery and equipment	100.4	105.5	135.8	112.8	98.7	103.5	100	105	135	112.4	98	103

[1] 1978 – 1981, actual; 1982, preliminary actual; 1983, mid-year revision.

SOURCE: Table 24.

7 — External Trade in Textile Products

a) Imports, Exports and Balance of Trade

A recession as profound as the one in 1982 has affected both the domestic market and the trade of these products with other countries. Three factors have exerted their influence simultaneously on external trade in textile products: a decline in final demand and inventory liquidations in Canada, as well as appreciation of the Canadian dollar (except against the United States dollar).

As described previously, the decline in final demand for textile products and the inventory liquidations have triggered decreases in upstream demand and slowed down textiles much more than clothing. Appreciation of the Canadian dollar has resulted in a decrease in relative prices of imports and an increase in relative prices of exports.

Compared to 1981, the value of imported textile products in 1982 has decreased 10.3 per cent, from $2,822.0 millions in 1981 to $2,531.5 millions in 1982. This overall decline is solely attributable to primary textiles, since the value of clothing imports has increased slightly. (Table 26). As in preceding years the sources of Canadian imports have continued to shift slowly from industrialized countries towards low-cost countries: imports of primary textiles from low-cost countries have increased less, and clothing imports from these same countries have increased more than imports from developed countries.

The value of imports in constant dollars illustrates the impact of the appreciation of the Canadian dollar in comparison with other currencies, with the exception of the United States dollar. For textiles, the decrease in value of imports in constant dollars has been greater than in current dollars. Conversely, for clothing the increase in value of imports in constant dollars has been greater than in current dollars. This means that import prices in 1982 increased for textiles and decreased for clothing. (Table 27). This evolution becomes understandable if the geographical distribution of imports is taken into account: more than half of all textile imports came from the United States while one-ninth only of all clothing imports originated in that country. Added to this is the fact that the Canadian dollar lost value only in relation to the United States dollar.

Data in Table 27 show imports in constant dollars, that is by volume, and illustrate the fundamental dichotomy in the evolution of imports in 1982: the volume of textile imports declined 21.4 per cent in 1982, that is, by a percentage almost identical to the 21.3 per cent decline in real domestic product for the textile industry; in contrast, the volume of clothing imports increased 5.2 per cent while the real domestic product for the clothing industry registered a drop of 15.3 per cent. When the clothing industry complains that it alone suffered the adverse effects of the recession, it is justified in saying so, since clothing imports not only did not decrease proportionately, but actually increased. Unfortunately, the main preoccupation of the participants to the

Table 26

VALUE OF TEXTILE AND CLOTHING IMPORTS FROM DEVELOPED COUNTRIES AND LOW-COST COUNTRIES

Values in million current dollars and changes in per cent

	Value of imports			Percentage change from previous year		
	Developed countries	Low-cost countries	Total	Developed countries	Low-cost countries	Total
TEXTILES[1]						
1978	1,146.6	217.6	1,364.2	15.7	21.2	16.6
1979	1,447.9	284.4	1,732.3	26.3	30.7	27.0
1980	1,363.8	279.3	1,643.1	−5.8	−1.8	−5.1
1981	1,534.3	333.3	1,867.6	12.5	19.4	13.7
1982	1,258.8	287.8	1,546.6	−18.0	−13.7	−17.2
CLOTHING[2]						
1978	205.3	449.6	654.9	0.2	12.9	8.6
1979	227.8	566.9	794.7	11.0	26.1	21.3
1980	214.5	563.0	777.5	−5.8	−0.7	−2.2
1981	234.6	719.8	954.4	9.4	27.9	22.8
1982	236.9	748.0	984.9	1.0	3.9	3.2

[1] Including floor coverings, hosiery and knitted fabrics.

[2] Including knitted clothing.

SOURCE: Department of Industry, Trade and Commerce/Regional Economic Expansion, based on Statistics Canada data.

Table 27

VALUE OF TEXTILE AND CLOTHING IMPORTS FROM DEVELOPED COUNTRIES AND LOW-COST COUNTRIES

Values in million 1971 dollars and changes in per cent

	Value of imports			Percentage change from previous year		
	Developed countries	Low-cost countries	Total	Developed countries	Low-cost countries	Total
TEXTILES						
1978	673.3	127.8	801.1	−0.4	4.2	0.3
1979	754.5	148.2	902.7	12.1	16.0	12.7
1980	642.7	131.6	774.3	−14.8	−11.2	−14.2
1981	645.2	140.2	785.4	0.4	6.5	1.4
1982	502.5	114.9	617.4	−22.1	−18.0	−21.4
CLOTHING						
1978	88.5	193.9	282.4	−12.1	−1.0	−4.8
1979	84.8	211.1	295.9	−4.2	8.9	4.8
1980	71.3	187.2	258.5	−15.9	−11.3	−12.6
1981	72.4	222.1	294.5	1.5	18.6	13.9
1982	74.5	235.2	309.7	2.9	5.9	5.2

SOURCE: Table 26 and Statistics Canada, Cat. 65-001.

Multifibre Agreement and the resulting bilateral agreements is not the cyclical situation but the trends in long term growth.

With regard to exports, there was a slight decrease for textiles (−9.1 per cent) and for clothing (−8.7 per cent). This decrease in current dollars is relatively modest if both the recession in other industrialized countries and the strength of the Canadian dollar are taken into account.

Under these conditions, and mainly as a result of the decrease in textile imports, the trade balance for all textile products has improved and the traditional deficit in this trading sector has diminished from $2,084 millions in 1981 to $1,860 millions in 1982. (Table 28). This trade balance, which can be determined for any one product or service, has no economic significance. Indeed, for any country, only the global balance covering all transactions with other countries will have significance. The trade balance in textiles is given here for information only.

The geographic distribution of imports has remained unchanged. In 1982 as in 1981, three quarters of all textile imports came from six major countries, with a strong concentration from the United States. (Table 29). Among low-cost countries the People's Republic of China, South Korea and Brazil were the three major sources of imports, and their share has been growing.

In the case of clothing, the six major industrialized countries account for only one fifth of all imports, that is less than the imports from Hong Kong alone. Among industrialized countries, two in particular, Italy and West Germany, have been providing increased quantities of clothing imports. Imports from other industrialized countries have either decreased or remained at the same level. (Table 30). With regard to low-cost countries, imports from two major sources, South Korea and the People's Republic of China have substantially increased. Imports from other low-cost countries have shown modest decreases overall.

Table 28

IMPORTS, EXPORTS AND TRADE BALANCE OF TEXTILE PRODUCTS AND CLOTHING

In million dollars

Period	Textiles[1]			Clothing[2]			Total
	Imports	Exports	Balance	Imports	Exports	Balance	Balance
1978	1,364.2	256.8	−1,107.4	654.9	147.4	−507.5	−1,614.9
1979	1,732.3	335.9	−1,396.4	794.7	189.9	−604.8	−2,001.2
1980	1,643.1	424.6	−1,218.5	777.5	230.2	−547.3	−1,765.8
1981	1,867.6	473.9	−1,393.7	954.4	263.7	−690.7	−2,084.4
1982	1,546.7	430.4	−1,116.3	984.9	240.8	−744.1	−1,860.4

[1] Including floor coverings, hosiery and knitted fabrics.

[2] Including knitted clothing.

SOURCE: Department of Industry, Trade and Commerce/Regional Economic Expansion, based on Statistics Canada data.

Table 29

CANADIAN IMPORTS OF TEXTILES [1] FROM MAJOR SOURCES

In million dollars and percentage of total value

Sources	1981 Value	1981 %	1982 Value	1982 %
DEVELOPED COUNTRIES				
United States	1,108.1	59.3	879.7	56.9
Japan	107.0	5.7	106.7	6.9
Italy	75.0	4.0	67.6	4.4
United Kingdom	69.7	3.7	59.0	3.8
Germany, West	38.0	2.0	38.5	2.5
France	35.3	1.9	27.7	1.8
Sub-total	1,433.1	76.7	1,179.2	76.2
LOW-COST SOURCES				
China, P.R.	62.1	3.3	57.6	3.7
Korea, South	59.3	3.2	47.3	3.1
Brazil	31.8	1.7	35.0	2.3
Taiwan	30.6	1.6	25.9	1.7
Hong Kong	22.8	1.2	23.3	1.5
India	21.5	1.2	17.2	1.1
Sub-total	228.1	12.2	206.3	13.4
OTHER SOURCES	206.4	11.1	161.1	10.4
TOTAL ALL COUNTRIES	**1,867.6**	**100.0**	**1,546.6**	**100.0**

[1] Including floor coverings, hosiery and knitted fabrics.

SOURCE: Department of Industry, Trade and Commerce/Regional Economic Expansion, based on Statistics Canada data.

Table 30

CANADIAN IMPORTS OF CLOTHING [1]
FROM MAJOR SOURCES
In million dollars and
percentage of total value

Sources	1981 Value	1981 %	1982 Value	1982 %
DEVELOPED COUNTRIES				
United States	117.8	12.3	111.6	11.3
France	27.6	2.9	27.0	2.7
Italy	27.4	2.9	32.1	3.3
United Kingdom	18.5	1.9	18.8	1.9
Germany, West	8.2	0.9	12.3	1.3
Japan	13.4	1.4	11.9	1.2
Sub-total	212.9	22.3	213.7	21.7
LOW-COST SOURCES				
Hong Kong	226.8	23.8	222.1	22.6
Taiwan	161.3	16.9	155.9	15.8
Korea, South	159.1	16.7	192.0	19.5
China, P.R.	55.4	5.8	63.7	6.5
India	31.2	3.3	26.3	2.7
Philippines	19.6	2.1	17.3	1.8
Sub-total	653.4	68.5	677.3	68.8
OTHER SOURCES	88.1	9.2	93.9	9.5
TOTAL ALL COUNTRIES	**954.4**	**100.0**	**984.9**	**100.0**

[1] Including knitted garments
SOURCE: Department of Industry, Trade and Commerce/Regional Economic Expansion, based on Statistics Canada data.

b) Utilization of Restraints

i) Restraints on Textile Products

As in the 1982 Annual Report, the data presented here relate to the initial restraint levels which are established at the beginning of the year and do not take into account the utilization of flexibility clauses incorporated in bilateral agreements, and to import permits issued against these initial restraints. Dividing the permits issued by the restraint level gives the degree of utilization of the restraint.

The year 1982 was the first year of application of the new bilateral agreements negotiated during 1981. These new agreements cover the five-year period from January 1982 to the end of December 1986.

The main characteristics of the new bilateral agreements which came into force on January 1, 1982 are a general lowering of restraint levels and reduced annual growth rates. The lowering of restraint levels was aimed not so much at an effective reduction of actual imports but rather at elimination of the unused portions of the restraints. In fact, because of the automatic growth provisions of previous years a substantial portion of the restraints had not been utilized and had therefore accumulated. This accumulation of unutilized restraints constituted a serious threat to the stability of domestic markets since they could have been utilized at any moment without prior notice. The new bilateral agreements have reduced this threat, and this has been done without any of the new restraints being set at a level below actual import levels during the period covered by previous bilateral agreements.

The new bilateral agreements have also eliminated the automatic six per cent annual growth rates stipulated in the Multifibre Agreement for 1978-1981. The growth rates now vary from country to country and from product to product, and in general the major exporting countries (Hong Kong, Taiwan and South Korea) have had to be satisfied with reduced growth rates while the new exporting countries whose restraint levels are relatively low have obtained higher growth rates.

Restraint levels for textile products have been reduced about 24 per cent from 1981 to 1982. Restraint levels for yarns have remained stable, those for fabrics have decreased about 25 per cent and those for household products, by 40 per cent. Only the restraints for miscellaneous textile products have shown an increase amounting to more than 30 per cent. (Table 31). In this respect, there has been an important increase in the restraint for hosiery. (Table 32). However, this increase is attributable to a greater extent to the inclusion of hosiery in a greater number of restraint agreements than to increases in restraint levels of agreements where they had already been included.

The overall rate of restraint utilization for textile products reached 64 per cent in 1982. Fabric restraints were utilized at close to 80 per cent, but the restraint utilization rate for miscellaneous textile products reached only 26 per cent, with the exception of hosiery for which the restraints were utilized at close to 100 per cent.

ii) Restraints on Clothing

From 1981 to 1982 there has been an overall reduction of 7.3 per cent on clothing restraints. Moreover these reduced restraints have been reallocated to the benefit of new exporting countries entering the market and at the expense of the major traditional exporting countries. As a result the overall clothing restraint for Hong Kong was reduced 8.8 per cent, for South Korea, 13.2 per cent, and more importantly, for Taiwan, 28.7 per cent, while the restraint levels for India, the People's Republic of China, the Philippines and other countries were increased. (Table 33). However, as in the case of miscellaneous textile products the increase in overall restraints does not constitute a real relaxation of the restraints. In fact, for several countries, it is the result of the inclusion in

Table 31

RESTRAINT LEVELS AND UTILIZATION RATES, TEXTILE PRODUCTS

Levels in tonnes

Products	1979 Restraint level	1979 Permits issued against restraint	1979 Restraint utilization rate per cent	1980 Restraint level	1980 Permits issued against restraint	1980 Restraint utilization rate per cent
Yarns	2,182	1,610	73.7	2,432	1,448	59.5
Fabrics	8,052	6,499	80.7	8,916	4,943	55.4
Sheets and pillowcases	2,736	1,164	42.5	2,802	1,173	41.8
Towels	1,919	1,650	86.0	2,369	1,805	76.2
Other household products	2,360	788	33.3	2,634	841	31.9
Misc. textiles: cordage, rope, twine; coated fabrics	1,567	1,250	79.8	1,602	1,274	79.5
TOTAL	**18,816**	**12,961**	**68.8**	**20,755**	**11,484**	**55.3**

RESTRAINT LEVELS AND UTILIZATION RATES, TEXTILE PRODUCTS

Levels in tonnes

	1981			1982		
Products	**Restraint level**	**Permits issued against restraint**	**Restraint utiliza-tion rate per cent**	**Restraint level**	**Permits issued against restraint**	**Restraint utiliza-tion rate per cent**
Yarns	2,477	1,824	73.6	2,423	1,786	73.7
Fabrics	9,735	5,689	58.4	7,332	5,851	79.8
Sheets and pillowcases	2,915	1,371	47.0	1,838	548	29.8
Towels	2,522	2,136	84.6	2,156	1,619	75.1
Other household products	2,934	880	29.9	1,007	524	52.0
Misc. textiles: cordage, rope, twine; coated fabrics	1,760	577	32.8	2,300	604	26.3
TOTAL	**22,343**	**12,477**	**55.8**	**17,056**	**10,922**	**64.0**

SOURCE: Textile and Clothing Board, based on data provided by the Department of External Affairs.

RESTRAINT LEVELS AND UTILIZATION RATES, WORK GLOVES, HANDBAGS AND HOSIERY

Levels in thousands of units

Products	1979 Restraint level	1979 Permits issued against restraint	1979 Restraint utilization rate per cent	1980 Restraint level	1980 Permits issued against restraint	1980 Restraint utilization rate per cent
Work gloves	20,976	20,788	99.1	25,775	16,226	63.0
Handbags of textiles	5,417	3,023	55.8	5,708	2,898	50.8
Hosiery	9,667	9,779	101.2	9,958	6,908	69.4
TOTAL	**36,060**	**33,590**	**93.2**	**41,441**	**26,032**	**62.8**

Table 32 (cont'd)

RESTRAINT LEVELS AND UTILIZATION RATES, WORK GLOVES, HANDBAGS AND HOSIERY
Levels in thousands of units

	1981			1982		
Products	**Restraint level**	**Permits issued against restraint**	**Restraint utiliza-tion rate per cent**	**Restraint level**	**Permits issued against restraint**	**Restraint utiliza-tion rate per cent**
Work gloves	28,072	15,434	55.0	24,403	18,407	75.4
Handbags of textiles	6,043	3,968	65.6	5,221	4,589	87.9
Hosiery	10,256	9,466	92.3	12,000	11,839	98.7
TOTAL	**44,371**	**28,868**	**65.0**	**41,624**	**34,835**	**83.7**

SOURCE: Textile and Clothing Board, based on data provided by the Department of External Affairs.

Table 33

RESTRAINT LEVELS AND UTILIZATION RATES BY COUNTRY, CLOTHING

Levels in thousands of units

Country of origin	1979 Restraint level	1979 Permits issued against restraint	1979 Restraint utiliza-tion rate per cent	1980 Restraint level	1980 Permits issued against restraint	1980 Restraint utiliza-tion rate per cent
Taiwan	49,884	43,535	87.3	51,538	37,234	72.2
Hong Kong	37,230	34,164	91.8	38,318	32,459	84.7
Korea, South	33,711	24,345	72.2	34,607	18,437	53.3
China, P.R.	14,196	18,052	127.2	14,746	14,374	97.5
Philippines	4,180	3,697	88.4	4,450	2,809	63.1
India	0	0	0	4,775	3,705	77.6
Romania	2,625	2,342	89.2	2,702	1,460	54.0
Poland	1,515	1,267	83.6	1,567	598	38.2
Singapore	1,945	488	25.1	2,062	868	42.1
Thailand	490	591	120.6	1,663	903	54.3
Macao	924	693	75.0	997	741	74.3
Malaysia	0	0	0	1,425	612	42.9
Bulgaria	915	353	38.6	961	217	22.6
Sri Lanka	0	0	0	924	484	52.4
Czechoslovakia						
Hungary	40	68	170.0	40	23	57.5
TOTAL	**147,655**	**129,596**	**87.8**	**160,775**	**114,924**	**71.5**

Table 33 (cont'd)

RESTRAINT LEVELS AND UTILIZATION RATES BY COUNTRY, CLOTHING

Levels in thousands of units

Country of origin	1981 Restraint level	1981 Permits issued against restraint	1981 Restraint utiliza-tion rate per cent	1982 Restraint level	1982 Permits issued against restraint	1982 Restraint utiliza-tion rate per cent
Taiwan	53,265	43,767	82.2	37,989	37,113	97.7
Hong Kong	39,449	31,807	80.6	35,981	31,781	88.3
Korea, South	35,539	24,865	70.0	30,848	29,829	96.7
China, P.R.	17,345	15,472	89.2	22,145	16,319	73.7
Philippines	4,739	2,959	62.4	5,369	3,969	73.9
India	5,053	4,657	92.2	7,350	3,725	50.7
Romania	2,804	1,429	51.0	3,505	1,407	40.1
Poland	1,620	886	54.7	2,805	1,417	50.5
Singapore	2,185	842	38.5	2,367	1,320	55.8
Thailand	1,764	851	48.2	2,230	1,112	49.9
Macao	1,057	865	81.8	1,200	839	69.9
Malaysia	1,499	450	30.0	1,991	1,095	55.0
Bulgaria	1,014	26	2.6	791	102	12.9
Sri Lanka	666	378	56.8	666	435	65.3
Czechoslovakia				440	273	62.0
Hungary	41	2	4.9	41	31	75.6
TOTAL	**168,039**	**129,256**	**76.9**	**155,718**	**130,767**	**84.0**

SOURCE: Textile and Clothing Board, based on data provided by the Department of External Affairs.

bilateral agreements of new products which previously were not subject to restraints. The inclusion of new product categories in bilateral agreements therefore results in increased restraint levels compared to the past, while in reality the restraints have been made more stringent. Direct interpretation of data in the tables relating to restraints should therefore be avoided. The correct interpretation of the changes in restraints requires prior analysis of each product group in each bilateral agreement.

In clothing as in textiles the overall decrease in restraint levels from 1981 to 1982 resulted mainly from the elimination of unused restraints. For example, the overall restraint for Bulgaria was reduced by more than one fifth. It will be noted however that during the period 1979-1981, the overall restraint utilization rate was less than two thirds for Bulgaria.

The reduction in restraint levels in 1982 was accompanied by a slight increase (1.2 per cent) in imports of clothing from countries subject to quantitative restraints. As a result, the rate of restraint utilization has increased significantly from 76.9 per cent in 1981 to 84 per cent in 1982. As expected, the restraint utilization rates for the three major traditional exporting countries (Hong Kong, South Korea and Taiwan) showed the greatest increases since the restraint levels for these three countries had been reduced. In contrast, the People's Republic of China, whose restraint level was raised from 1981 to 1982, did not manage to utilize its restraint as much as in the years 1979-1981.

In 1982 the above four major exporting countries accounted for 81.5 per cent of all restraints on clothing and 88.0 per cent of imports under restraint. For several years these four countries have been by far the major suppliers of clothing imports in Canada and are expected to maintain this position for the foreseeable future.

The overall reduction in restraints from 1981 to 1982 is the net total of reductions in restraints for eight clothing categories and of increases for six others. (Table 34). The most significant increases have been for children's clothing, underwear, swimwear and foundation garments. As to rates of restraint utilization they have increased considerably for textile products as well as for clothing categories for which the restraint levels have been reduced. In the other categories the behaviour of restraint utilization rates was mixed.

Even though clothing imports from countries subject to restraints increased only 1.2 per cent overall in 1982, as we have seen above, there was considerable variation in the increases from one clothing category to another. For example, the increase in imports from these countries from 1981 to 1982 amounted to 33.2 per cent for structured suits and sport jackets, 25.9 per cent for underwear, 22.5 per cent for children's clothing and 18.9 per cent for men's shirts with tailored collars. Such substantial increases could lead to market disruption. However they have been offset by a significant decrease (-21.9 per cent) in the swimwear category and a decrease which is less significant (-8.4 per cent) but which applies to the largest category by far of clothing imports

Table 34

RESTRAINT LEVELS AND UTILIZATION RATES BY PRODUCT, CLOTHING

Levels in thousands of units

Products	1979			1980		
	Restraint level	Permits issued against restraint	Restraint utilization rate per cent	Restraint level	Permits issued against restraint	Restraint utilization rate per cent
1. Outerwear	3,074	2,894	94.1	3,118	2,435	78.1
2. Pants, shorts, overalls, coveralls	20,201	18,147	89.8	21,319	16,056	75.3
3. Shirts, tailored collar, men's and boys'	12,351	13,358	108.2	14,242	11,957	84.0
4. Blouses, shirts, T-shirts and sweatshirts	50,686	46,387	91.5	56,308	39,335	69.9
5. Sweaters, pullovers and cardigans	26,071	18,669	71.6	26,375	17,799	67.5
6. Sleepwear	4,661	4,873	104.5	4,916	3,242	65.9
7. Dresses, skirts, coordinates	9,703	5,924	61.1	11,732	5,509	47.0
8. Underwear	8,525	8,983	105.4	8,870	9,514	107.3
9. Swimwear, foundation garments	4,055	3,558	87.7	4,298	2,926	68.1
10. Coats, jackets, rainwear	6,020	4,408	73.2	7,135	4,041	56.6
11. Fine suits, sport-coats	496	568	114.5	510	356	69.8
12. Leather coats	112	12	10.7	115	14	12.2
13. Children's clothing: categories above apply to all ages as specified in the agreements except in Philippines agreement where restraint is:	1,700	1,813	106.6	1,836	1,738	94.7
14. Non-classified garments						
TOTAL	**147,655**	**129,596**	**87.8**	**160,775**	**114,924**	**71.5**

RESTRAINT LEVELS AND UTILIZATION RATES BY PRODUCT, CLOTHING

Levels in thousands of units

Products	1981			1982		
	Restraint level	Permits issued against restraint	Restraint utilization rate per cent	Restraint level	Permits issued against restraint	Restraint utilization rate per cent
1. Outerwear	3,181	2,594	81.5	2,984	2,799	93.8
2. Pants, shorts, overalls, coveralls	22,807	18,873	82.8	21,442	20,162	94.0
3. Shirts, tailored collar, men's and boys'	14,501	11,448	78.9	14,249	13,606	95.5
4. Blouses, shirts, T-shirts and sweatshirts	58,902	45,985	78.1	51,043	42,122	82.5
5. Sweaters, pullovers and cardigans	26,876	21,037	78.3	23,793	20,566	86.4
6. Sleepwear	5,486	3,736	68.1	4,951	4,060	82.0
7. Dresses, skirts, coordinates	12,453	6,573	52.8	10,169	6,703	65.9
8. Underwear	9,230	7,999	86.7	11,046	10,067	91.1
9. Swimwear, foundation garments	4,556	3,231	70.9	4,881	2,525	51.7
10. Coats, jackets, rainwear	7,415	5,864	79.1	7,742	5,865	75.8
11. Fine suits, sport-coats	531	349	65.7	596	465	78.0
12. Leather coats	119	77	64.7	2	1	50.0
13. Children's clothing: categories above apply to all ages as specified in the agreements except in Philippines agreement where restraint is:	1,983	1,491	75.2	2,500	1,827	73.1
14. Non-classified garments				320	—*	—*
TOTAL	**168,039**	**129,256**	**76.9**	**155,718**	**130,767**	**84.0**

* Non-classified garments have been incorporated in the above categories insofar as permits issued are concerned.
SOURCE: Textile and Clothing Board, based on data provided by the Department of External Affairs.

(blouses, shirts, T-shirts and sweatshirts, for which imports decreased from 46 million units in 1981 to 42 millions in 1982).

Such extreme variations in imports of certain products have continued into the first half of 1983. Moreover, these imports have often been concentrated in a short period during the year. There is no doubt that such large fluctuations in imports from one year to the next, and their excessive concentration in the first months of each year, constitute disruptive factors which seriously disrupt the efficient planning of clothing production in Canada. It would therefore be useful to explore mechanisms which could both reduce import surges (anti-surge clauses) and assure orderly marketing. Utilization of such mechanisms would not be contrary to the Multifibre Agreement presently in force. If they were utilized judiciously, they could contribute to greater market stability without penalizing the import trade. Sudden increases in imports will always occur, but it is the magnitude of these increases which should be better controlled. Similarly, imports will continue to be concentrated during certain months of the year for those categories of clothing for which demand is seasonal. Orderly marketing can be perfectly adapted to this type of seasonal demand.

c) Structural Aspects of Textile Imports

i) Share of Different Categories of Importers in Imports of Clothing

The Board has found in preceding years that the share distribution of clothing imports by category of importers was shifting gradually. The dominant position of professional importing firms was being slightly eroded while the shares of imports by retailers and clothing manufacturers were increasing. After a few years these changes, quite small from one year to the next, end up becoming significant. Thus, from 1978 to 1982, the share of imports by professional importing firms declined from 67.6 to 58.9 per cent in unit terms. During these same years the share going to retail stores went up from 13.8 to 18.4 per cent, and the share of clothing manufacturers, from 18.6 to 22.7 per cent. (Table 35).

Table 35

SHARE DISTRIBUTION OF CLOTHING IMPORTS BY CATEGORY OF IMPORTERS
Per cent based on units imported

Category of Importers	1978	1979	1980	1981	1982
Professional importing firms	67.6	65.0	62.1	59.1	58.9
Retail stores	13.8	15.3	16.9	19.4	18.4
Clothing manufacturers	18.6	19.7	21.0	21.5	22.7
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

SOURCE: Textile and Clothing Board, based on Statistics Canada data.

This change in share distribution also shows up when imports are expressed in terms of value instead of units. From 1978 to 1982 the import share of professional importing firms declined from 60.3 to 49.7 per cent, while those of retail stores and clothing manufacturers increased from 18.8 to 23.7 per cent and 20.9 to 26.6 per cent respectively. (Table 36).

The ranking of the three categories of importers in terms of unit value of imported products has not changed from 1978 to 1982. In each of these five years, retail stores imported products with the highest unit value. Clothing manufacturers came second, followed by professional importing firms. (Table 37). The reasons for this particular ranking have been discussed in the corresponding section of last year's Annual Report.

Table 36

SHARE DISTRIBUTION OF CLOTHING IMPORTS BY CATEGORY OF IMPORTERS
Per cent of value of imports

Category of importers	1978	1979	1980	1981	1982
Professional importing firms	60.3	57.6	52.0	50.0	49.7
Retail stores	18.8	19.6	23.0	24.7	23.7
Clothing manufacturers	20.9	22.8	25.0	25.3	26.6
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

SOURCE: Textile and Clothing Board, based on Statistics Canada data.

Table 37

WEIGHTED AVERAGE UNIT VALUE OF IMPORTS BY CATEGORY OF IMPORTERS
In dollars

Category of importers	1978	1979	1980	1981	1982
Professional importing firms	2.86	3.43	3.73	3.95	4.15
Retail stores	4.37	4.98	6.07	5.94	6.34
Clothing manufacturers	3.60	4.48	5.30	5.46	5.77

SOURCE: Textile and Clothing Board, based on Statistics Canada data.

ii) International Comparison of the "Openness" of National Markets

Delays in the publication of international statistics prevent an analysis of the recent evolution of imports. Only the statistics for the year 1981 are available at this time (middle of 1983). Nevertheless, even though they are dated these statistics are still useful, since they demonstrate first the extent to

Table 38

VALUE OF TEXTILE IMPORTS BY HIGHLY DEVELOPED COUNTRIES FROM LOW-COST COUNTRIES

United States dollars per capita

Country	Primary textile products					Clothing					Total				
	1975	1978	1979	1980	1981	1975	1978	1979	1980	1981	1975	1978	1979	1980	1981
1. West Germany	4.92	8.29	11.14	13.18	10.60	19.27	32.53	42.05	50.00	47.38	24.19	40.82	53.19	63.19	66.26
2. Netherlands	6.68	10.41	13.49	15.50	12.22	22.21	34.89	41.74	44.66	41.05	28.89	45.30	55.23	60.15	53.26
3. Australia	12.40	21.26	26.65	29.60	29.89	10.50	16.23	14.97	16.47	21.07	22.90	37.49	41.62	46.07	50.96
4. Sweden	8.67	9.14	12.06	14.47	11.66	20.84	28.42	35.05	41.87	39.04	29.51	37.56	47.11	56.34	50.69
5. Switzerland	3.49	5.39	6.79	11.57	10.26	12.81	27.43	28.77	36.34	40.37	16.30	32.82	35.56	47.91	50.63
6. New Zealand	21.10	35.44	44.25	44.46	41.76	0.85	0.74	1.28	2.34	3.84	21.95	36.18	45.53	46.81	45.60
7. Denmark	7.70	11.88	15.67	16.70	13.55	13.22	23.03	30.42	34.89	29.04	20.92	34.91	46.09	51.59	42.65
8. United States	2.28	4.12	4.24	4.91	6.06	9.30	22.65	23.05	25.73	30.17	11.58	26.77	27.29	30.64	36.22
9. Canada	4.88	7.25	9.47	9.23	10.80	11.74	16.25	20.40	20.00	24.85	16.62	23.50	29.87	29.23	35.65
10. Belgium-Luxembourg	7.76	11.72	17.77	22.57	18.42	6.86	11.36	14.28	17.76	17.14	14.62	23.08	32.06	40.32	35.56
11. United Kingdom	4.64	7.60	10.03	8.81	8.08	10.26	15.35	22.11	24.08	24.91	14.90	22.95	32.14	32.90	32.99
12. Norway	4.42	5.87	7.47	9.53	9.56	12.78	17.51	17.63	22.42	21.91	17.20	23.38	25.09	31.95	31.47
13. Finland	4.88	5.96	10.05	12.78	11.82	4.17	5.74	8.97	14.09	14.00	9.05	11.70	19.02	26.87	25.82
14. Austria	4.02	7.22	8.60	12.35	9.65	6.53	9.59	13.97	17.20	15.72	10.55	16.80	22.57	29.55	25.38
15. France	3.04	5.03	7.29	8.34	6.82	4.32	7.07	11.22	14.89	14.19	7.36	12.10	18.51	23.23	21.02
16. Japan	4.05	8.69	11.58	8.56	8.83	3.17	7.13	10.02	8.11	9.98	7.22	15.82	21.59	16.67	18.81
17. Ireland	4.47	7.31	10.27	9.36	6.53	0.78	3.00	4.78	6.19	8.00	5.25	10.31	15.05	15.55	14.54
18. Italy	2.79	4.86	9.15	10.33	8.00	1.12	1.91	2.98	4.91	4.71	3.91	6.77	12.13	15.24	12.71

SOURCE: Textile and Clothing Board, based on U.N. Trade Statistics (International Trade Data Bank).

which the markets of certain highly industrialized countries are open or closed to imports from low-cost countries, and second, to what extent the various highly industrialized countries tend to maintain their respective positions in the international ranking.

In its Report last year the board noted the following:

> "In terms of value of imports per capita, Canada has traditionally occupied a middle position among the highly industrialized countries which apply quantitative restraint measures on textile imports. In 1980 however, textiles had a very poor year. Not only did domestic production decline, but also, and quite substantially, did imports from both developed countries and low-cost countries.
>
> Among 18 highly industrialized countries only Canada and Japan reported a decrease in imports in 1980 . . . Because of this decrease Canada has slipped to the 13th position, down from an average 9th position in previous years . . . Since statistics for 1981 show a substantial increase in imports into Canada, there is reason to conclude that Canada will have returned in 1981 to its traditional position."

As shown in Table 38, this is exactly what happened and Canada is ranked once more in 9th position, in the middle of the list. The special measures of protection applied by Canada are average in severity. Compared to other industrialized countries Canada is neither too liberal, nor too restrictive. There are eight countries whose per capita value of imports is higher than for Canada and consequently appear to be more open. However, there are nine other countries which appear to be more restrictive than Canada in allowing textile and clothing imports from low-cost countries.

In numerous textile and clothing trade circles in Canada, there is a widely held opinion that the United States appears to follow much more restrictive import policies than Canada. However, according to Table 38, it is obvious that this opinion is unfounded. In fact, although the United States imports less textile products than Canada, this deficit is offset by higher clothing imports. In the four years 1978-1981 United States per capita imports amounted to U.S. $120.92 while Canadian imports amounted to U.S. $118.25.

With regard to results for 1982, a poor year for textile industries in most of the highly industrialized countries, few changes should be expected in the ranking of these countries compared to those for 1981.

8 — Apparent Canadian Markets for Textiles and Clothing

As a reminder, the apparent Canadian market for any one product is obtained by adding the quantities of the product which have been imported to those shipped by the Canadian producers, and subtracting the export shipments of the latter. The calculations are done in kilograms for yarns, square metres for fabrics and number of units for clothing.

With regard to yarns and fabrics, the data for apparent Canadian markets are gathered by the Textile, Clothing and Footwear Division of the Office of Industrial Adjustment, Department of Industry, Trade and Commerce/ Regional Economic Expansion. Data on clothing are obtained from an annual survey of a sample of firms carried out by the Textile and Clothing board. This information is published by the Board in a separate document from the Annual Report.

The apparent markets of all textile products underwent considerable decline from 1981 to 1982. Table 39 shows the results by product and displays an overwhelming majority of negative signs for apparent markets as well as for domestic shipments (net of exports) and imports. The only exception of note is polyester-cotton yarns where the signs are all positive. However, as we have seen previously, this is accidental and results from some plants closing in late 1981 and then reopening at the beginning of 1982. Imports decreased more than domestic shipments for eight of the other fourteen products, and decreased less in the case of the six remaining products.

Table 39

VARIATIONS IN APPARENT MARKETS, DOMESTIC SHIPMENTS AND IMPORTS OF PRIMARY TEXTILE PRODUCTS FROM 1981 TO 1982

Per cent

Products	Apparent market	Domestic shipments (net of exports)	Total imports
Polyester fabrics	−9.1	0.5	−16.3
Cotton and polyester-cotton fabrics, corduroys and denims	−28.4	−32.6	−24.3
Polyester-cotton yarns	24.6	29.6	13.2
Woollen and worsted fabrics	−15.7	−23.3	−8.9
Towels and washcloths	−18.7	−6.1	−33.1
Acrylic yarns (worsted spun)	−1.4	−2.2	−0.3
Pillowcases	−21.2	−11.1	−37.4
Rayon fabrics	−13.7	−11.2	−17.9
Sheets	−19.4	−7.8	−47.5
Nylon fabrics	−25.0	−28.0	−17.4
Coated fabrics	−14.5	−12.7	−16.2
Polyester filament yarns	−9.8	−28.9	59.1
Nylon filament yarns	−29.3	−21.2	−56.2
Cotton yarns	−13.4	−9.7	−18.1
Acetate rayon filament yarns	−23.2	−24.2	−11.8

SOURCE: Department of Industry, Trade and Commerce/Regional Economic Expansion.

With apparent markets in steep decline, Canadian producers lost some slight ground to imports in the case of yarns and fabrics while they maintained their position with regard to imports of sheets, pillowcases, towels and washcloths. The share of the market for yarns held by domestic producers amounted to 72 per cent in 1982, compared to 74 per cent in 1981. For all fabrics, the share held by Canadian producers in 1982 declined to 50 per cent, from 52 per cent in 1981. (Table 40). In contrast, this share increased for the various categories of household furnishings.

Table 40

SHARES OF APPARENT MARKETS FOR PRIMARY TEXTILES HELD BY DOMESTIC SHIPMENTS AND IMPORTS

Per cent

Products	Domestic shipments			Imports		
	1980	1981	1982	1980	1981	1982
All yarns[1]	73	74	72	27	26	28
Acrylic yarns (worsted spun)	62	60	59	38	40	41
All fabrics[2]	50	52	50	50	48	50
Cotton and polyester-cotton fabrics, corduroys and denims	48	50	47	52	50	53
Woollen and worsted fabrics	54	47	43	46	53	57
Sheets	75	71	81	25	29	19
Pillowcases	67	62	70	33	38	30
Towels and washcloths	60	53	62	40	47	38

[1] Excludes cotton spun acrylic yarns, and spun yarns of rayon, nylon and polyester.
[2] Excludes coated fabrics.
SOURCE: Department of Industry, Trade and Commerce/Regional Economic Expansion.

The evolution in the relative shares of the Canadian market held by domestic producers gives a more favourable impression of the situation than it is in reality. This evolution has been occurring within a framework of recession, with all apparent markets in decline, and in some cases very steep decline. The shares of domestic producers may be greater but they are shares of smaller markets.

With regard to "special" textile products, which are analyzed on a regular basis, not because of their importance but because of the special measures of protection which apply to them, the evolution is similar to that for textiles. With the exception of hosiery, apparent markets for these were all in decline in 1982. Both domestic shipments and imports also declined, except again for hosiery, where domestic shipments increased (+3.1 per cent) while total imports decreased (-4.5 per cent). (Table 41).

Table 41

VARIATIONS IN APPARENT MARKETS, DOMESTIC SHIPMENTS AND IMPORTS OF "SPECIAL" TEXTILE PRODUCTS, AND MARKET SHARES OF DOMESTIC SHIPMENTS AND IMPORTS

VARIATIONS IN APPARENT MARKETS, DOMESTIC SHIPMENTS AND IMPORTS

Per cent

Products	Apparent market 1982/81	Domestic shipments net of exports 1982/81	Total imports 1982/81
Hosiery	0.9	3.1	−4.5
Cordage, rope and twine	−20.8	−10.7	−25.0
Handbags	−11.5	−10.4	−12.3
Work gloves	−24.1	−31.9	−19.4

SHARES OF APPARENT MARKETS HELD BY DOMESTIC SHIPMENTS AND IMPORTS

Per cent

Products	Domestic shipments			Imports		
	1980	1981	1982	1980	1981	1982
Hosiery	73	71	72	27	29	28
Cordage, rope and twine	27	29	33	73	71	67
Handbags	46	43	44	54	57	56
Work gloves	41	38	34	59	62	66

SOURCE: Department of Industry, Trade and Commerce/Regional Economic Expansion, and Textile and Clothing Board.

As to market shares held by Canadian producers, they are traditionally high for hosiery (more than 70 per cent) and relatively low for all others. In two categories of special products, cordage, rope and twine, and work gloves, the shares held by domestic producers in 1982 were one third of the total market. However, this was the result of changes in opposite directions: in effect, from 1980 to 1982 the market share held by domestic producers of cordage, rope and twine increased from 27 to 33 per cent, while for work glove producers, the share diminished from 41 to 34 per cent.

Apparent markets for clothing were also generally declining owing to consumer reluctance and to widespread inventory reductions. With regard to the 18 cateories of clothing products, the apparent market in 1982 declined for 13 groups, remained stable for two and increased for three. Domestic shipments also decreased for 13 groups out of 18, while total imports decreased in only 9 product categories, and imports from restrained sources decreased in 5 categories only out of 18. (Table 42).

Table 42

VARIATIONS IN APPARENT MARKETS, DOMESTIC SHIPMENTS AND IMPORTS OF CLOTHING FROM 1980 TO 1982

Per cent

Clothing category	Apparent market		Domestic shipments net of exports		Total imports		Imports from restrained sources	
	81/80	82/81	81/80	82/81	81/80	82/81	81/80	82/81
Other men's shirts	33	12	26	9	60	19	41	29
Unstructured suits	32	−16	47	−14	23	−18	−13	87
T-shirts and sweatshirts	18	−4	24	−15	11	9	22	10
Children's and infants' wear [1]	15	−12	6	−11	41	−14	62	−13
Jackets, overcoats and topcoats	14	−2	−2	−21	37	19	57	27
Pyjamas and sleepwear	14	−6	12	−6	26	−3	21	11
Women's blouses and shirts	10	−2	−6	5	27	−8	32	−6
Sweaters	4	neg	−9	5	15	−3	15	1
Foundation garments	3	−7	3	−5	8	−27	20	36
Swimsuits	2	6	neg	6	5	5	8	23
Underwear	1	−15	1	−17	7	−1	6	21
Women's sportswear, dresses	−5	−4	−14	−6	26	3	38	15
Structured suits and jackets	−7	neg	−3	−5	−29	38	−31	63
Men's shirts with tailored collars	−9	−1	−13	−13	−3	15	−2	16
Outerwear	−11	11	−17	15	6	2	3	−4
Pants, shorts, overalls	−11	−4	−10	−6	12	4	8	19
Raincoats	−17	−14	−16	−14	−18	−14	39	−51
Leather coats and jackets	−19	−18	−23	−14	69	−63	333	−98
All clothing categories	**4**	**−6**	**−1**	**−9**	**17**	**1**	**21**	**8**

[1] Children's and infants' – includes outerwear, pants, slacks, shorts, overalls, coveralls, pyjamas and sleepwear, dresses, skirts, suits, co-ordinates, short sets, sweaters, pull-overs, cardigans. (All 0-6X).

SOURCE: Textile and Clothing Board.

In summary it can be said that apparent markets for the various categories of clothing decreased 6 per cent in 1982 and domestic shipments decreased 9 per cent, while total imports increased 1 per cent and imports from restrained sources, 8 per cent.

As a result of these changes in shipments by Canadian producers and in imports, the share of the apparel market held by domestic producers has continued to decline in 1982. Their share, which amounted to 73 per cent in 1980, is now only 67 per cent, or two thirds of the 1982 apparent market.

Conversely, the share of total imports increased from 27 to 33 per cent during the same period. One garment in three sold in Canada is an imported garment. (Table 43).

The recession therefore had the effect of reducing the portion of the apparent market supplied by Canadian producers. Imports, particularly those from low-cost countries, have strengthened their position in the Canadian market. It is unlikely that Canadian producers will manage to recover in 1983 or 1984 the market share which they lost in 1981 and 1982.

Table 43

SHARES OF APPARENT MARKETS FOR CLOTHING HELD BY DOMESTIC SHIPMENTS AND IMPORTS

Per cent

Clothing category	Domestic shipments 1980	Domestic shipments 1981	Domestic shipments 1982	Total imports 1980	Total imports 1981	Total imports 1982
Other men's shirts	79	75	73	21	25	27
Unstructured suits	37	42	43	63	58	57
T-shirts and sweatshirts	53	55	49	47	45	51
Children's and enfants' wear [1]	74	68	68	26	32	32
Jackets, overcoats, topcoats	60	52	42	40	48	58
Pyjamas and sleepwear	85	83	83	15	17	17
Women's blouses and shirts	50	43	46	50	57	54
Sweaters	45	39	41	55	61	59
Foundation garments	90	90	92	10	10	8
Swimsuits	60	58	59	40	42	41
Underwear	89	88	86	11	12	14
Women's sportswear, dresses	79	72	70	21	28	30
Structured suits and jackets	83	87	83	17	13	17
Men's shirts with tailored collars	60	57	50	40	43	50
Outerwear	74	69	72	26	31	28
Pants, shorts, overalls	77	73	71	23	27	29
Raincoats	49	49	49	51	51	51
Leather coats and jackets	95	91	96	5	9	4
All clothing categories	**73**	**69**	**67**	**27**	**31**	**33**

[1] Children's and infants' – includes outerwear, pants, slacks, shorts, overalls, coveralls, pyjamas and sleepwear, dresses, skirts, suits, co-ordinates, short sets, sweaters, pull-overs, cardigans. (All 0-6X).

SOURCE: Textile and Clothing Board.

II Results of the Survey on Age of Equipment in the Textile and Clothing Industries and in Contracting Firms

In order to assess the textile and clothing industries' efforts at improving their equipment and profiting from new technologies with the aim of increasing or maintaining their competitive ability, the Textile and Clothing Board undertook a first survey at the beginning of 1981 of the age of equipment, plans for installation of new equipment, and equipment newly installed each year. The survey was repeated in 1982 and again in 1983. The results of this last survey are presented here.

Age of equipment is not the only criterion of competitive ability of producers. Other criteria are also important. However, age of equipment has the advantage of being measurable without too much difficulty, hence the particular attention given to it by the Board.

It should be remembered however, that there are certain limitations to this survey.

Firstly, this survey covers only the industry sectors which benefit from quantitative restraints on imports, or have done so in the past (this is the case for the knitted fabric sector). Thus, sectors producing carpets, drapery and narrow fabrics are excluded from the survey.

Secondly, because of the large variety of equipment used in textile and clothing plants it was practically impossible to include them all in the survey. However, the survey covers the more important pieces of equipment whose age is likely to be representative of the overall quality of the equipment used and of the degree of modernization of the production facilities. In this respect, it has been assumed – which appears to us fairly realistic – that any improvement in the more important pieces of equipment would not bring about the expected results unless there is a parallel improvement in auxiliary equipment of lesser importance.

Lastly, there was no need to canvas all the firms to assess the age of equipment in the two industries. In certain sectors of the textile industry the firms covered by the survey included all or most of the firms in the sector. The same situation prevailed with regard to the share of the surveyed firms in the total shipments of their respective sectors. As to the other textile industry sectors, the firms surveyed in these sectors always accounted for a substantial, if not major, percentage of the total number of firms and of total shipments in each sector. (Table 1). The situation is different in the clothing industry with regard to the degree of representativeness of the sample of firms surveyed.

Table 1

SAMPLE USED IN THE SURVEY OF EQUIPMENT IN THE TEXTILE INDUSTRY

In numbers and per cent

Sectors	Number of firms in sector	Number of firms in the sample	Share of total shipments held by sample firms
Acrylic yarns (cotton spun)	4	4	100
Acrylic yarns (worsted spun)	6	5	98
Cotton and polyester-cotton yarns	4	4	100
Rayon, polyester, nylon yarns	17	7	46
Cotton and polyester-cotton fabrics, corduroys and denims	3	2	83
Woollen and worsted fabrics	8	7	95
Rayon, nylon, polyester fabrics	19	9	76
Coated fabrics	5	3	95
Sheets and pillowcases	2	2	100
Towels	3	3	100
Knitted fabrics	55	23	67
Cordage, rope and twine	20	6	91
Hosiery	45	14	58
Work gloves	27	8	62
Handbags (of textiles)	22	10	90
TOTAL	240	107	
Firms producing in more than one sector	15	14	
NET TOTAL	**225**	**93**	

SOURCE: Textile and Clothing Board.

In this case the Board's survey covers just under 20 per cent of the firms in the clothing industry which produce garments subject to special measures of protection. However, since these firms account for somewhat more than 60 per cent of total production they are therefore the most important firms of the sectors involved. Consequently, the smaller firms are under-represented in the Board's sample, and the latter is not fully representative of these small firms. Nevertheless, the sample still provides a true picture of the condition of equipment in the more important firms of this industry. (Table 2).

Table 2

SAMPLE USED IN THE SURVEY OF EQUIPMENT IN THE CLOTHING INDUSTRY
In numbers and per cent

Sectors	Number of firms in the sample[1] 1981	1982	Share of total shipments held by sample firms 1981	1982
Outerwear	23	24	86	94
Pants, overalls, coveralls	46	45	67	64
Women's blouses and shirts, T-shirts and sweatshirts	28	31	62	69
Pyjamas and sleepwear	27	25	52	52
Raincoats	2	2	46	54
Women's sortswear, dresses, skirts and suits, unstructured suits	54	57	55	54
Foundation garments	6	6	89	89
Swimwear	8	6	79	77
Underwear	15	16	59	60
Jackets, overcoats and topcoats, leather coats and jackets	28	21	50	48
Structured suits and jackets	17	18	69	72
Men's tailored collar shirts	22	17	81	82
Sweaters, pull-overs and cardigans	25	24	62	57
TOTAL	**301**	**292**	**63**	**64**

[1] Firms whose major product falls within sector.
SOURCE: Textile and Clothing Board

1 — Age of Equipment in the Textile Industry

Table 3 details the age distribution of various types of equipment used in the textile industry.

Twenty-five per cent of the cards used at present are less than 5 years old. Compared to the corresponding figure of 8 per cent in 1980[1], this is a remarkable improvement. Ten per cent of the spinning frames are now less than 5 years old, compared to 7 per cent in 1980. For winders, the respective percentages are 23 per cent and 8 per cent. The proportion of twisters less than 5 years old has changed very little: 13 per cent in 1980 and 14 per cent in 1982. Texturing equipment appears to have aged in the last two years. In effect, 26 per cent of this equipment was less than 5 years old in 1980 while the proportion in 1982 was only 19 per cent. This can largely be attributed to the closure of Riverside Yarns Limited and the consequent deletion of that firm's relatively new equip-

[1] Data on age of equipment indicate the age of equipment at the end of the year referred to.

ment from the survey. In the case of looms — the most important equipment in terms of numbers, since they represent more than half the total of all the types of equipment surveyed — the renewal is proceeding more slowly, but still at a significant pace. In 1980, only 6 per cent of the looms were less than 5 years old while this percentage now stands at 10 per cent. It should be noted that at the same time the proportion of shuttleless looms has increased from 22 per cent to 36 per cent, or in numbers, from 1,649 to 2,051. At the same time, the number of older shuttle looms has decreased from 10,661 to 9,595. The age of equipment in the dyeing and printing departments has also shown an improvement, the proportion of equipment less than 5 years old moving from 7 per cent in 1980 to 14 per cent in 1982.

It can be said that, with the exception of texturing equipment, production equipment in general has been gradually rejuvenated since 1980 and that in certain cases this rejuvenation has been remarkable.

This and preceding surveys include data on equipment installed in 1980, 1981 and 1982, and on planned installations in 1981, 1982 and 1983. (Table 4).

These data show that 1981 was the year during which the industry installed the largest number of machines, 637, compared to 398 in 1980 and 411 in 1982. Almost half of the machines installed in 1981 were looms. This rate of installation did not continue in 1982, during which only half the number of looms were installed by the industry, compared to 1981.

In 1981 and 1982, the only two years for which data are available on both planned and actual installations, the latter exceeded the forecast for all equipment even though, as noted above, equipment installed in 1982 was only two thirds of that installed in 1981.

Planned installations for 1983 are close to actual installations in 1981. Plans call for the installation of 621 machines (compared to 637 in 1981), of which 370 are looms, a higher number of these than in 1981. If the forecasts for 1983 prove accurate, the industry will have installed during the four year period from 1980 to 1983 a total of 82 cards, 182 spinning frames, 163 winders, 46 texturing machines, 1002 looms and 80 pieces of dyeing and printing equipment.

Table 5 shows the average cost of the various types of equipment installed in 1982. The average cost of equipment installed in 1982 is more than 50 per cent higher than the average cost of installations in the preceding year. These average costs vary from year to year for a number of reasons. Firstly, because there have been overall price increases. Secondly, newly installed equipment may be more sophisticated or may have more production capacity than equipment installed in previous years. Thirdly, and more importantly, the mix of equipment with substantial differences in cost varies considerably from year to year.

Table 3

AGE OF EQUIPMENT IN THE TEXTILE INDUSTRY[1]

In numbers and per cent

Type of equipment		More than 30 years	20-30 years	10-19 years	5-9 years	Less than 5 years	TOTAL	Number planned 1982	Number installed 1982	Number planned 1983
Cards	*Number*	39	220	423	134	277	1,093	2	17	18
	Per cent	(4)	(20)	(39)	(12)	(25)	(100)			
Ring spinning										
— Frames	*Number*	195	569	1,112	205	133	2,214	17	32	22
	Per cent	(9)	(26)	(50)	(9)	(6)	(100)			
— Spindles	*Number*	50,708	142,654	317,690	55,712	44,828	611,592	14,556	18,324	12,248
	Per cent	(8)	(23)	(52)	(9)	(8)	(100)			
Open-end spinning										
— Frames	*Number*	—	—	—	30	38	68	—	2	4
	Per cent	—	—	—	(44)	(56)	(100)			
— Rotors	*Number*	—	—	—	4,668	6,872	11,540	—	200	672
	Per cent	—	—	—	(40)	(60)	(100)			
REPCO spinning										
— Frames	*Number*	—	—	—	41	67	108	2	25	14
	Per cent	—	—	—	(38)	(62)	(100)			
Total, spinning frames	*Number*	195	569	1,112	276	238	2,390	19	59	40
	Per cent	(8)	(24)	(46)	(12)	(10)	(100)			
Ring spinning frames	*% of total*	(100)	(100)	(100)	(74)	(56)	(93)			
Open-end spinning frames	*% of total*	—	—	—	(11)	(16)	(3)			
REPCO spinning frames	*% of total*	—	—	—	(15)	(28)	(4)			

AGE OF EQUIPMENT IN THE TEXTILE INDUSTRY[1]

In numbers and per cent

Type of equipment		More than 30 years	20-30 years	10-19 years	5-9 years	Less than 5 years	TOTAL	Number planned 1982	Number installed 1982	Number planned 1983
Winders										
— Machines	*Number*	12	11	253	124	122	522	16	52	31
	Per cent	(2)	(2)	(49)	(24)	(23)	(100)			
— Spindles	*Number*	1,416	536	6,857	3,365	3,054	15,228	883	1,115	475
	Per cent	(9)	(4)	(45)	(22)	(20)	(100)			
Twisters										
— Machines	*Number*	21	39	184	43	48	335	8	20	21
	Per cent	(6)	(12)	(55)	(13)	(14)	(100)			
— Spindles	*Number*	2,912	5,760	26,836	6,340	5,276	47,124	566	2,164	3,136
	Per cent	(6)	(12)	(57)	(14)	(11)	(100)			
Texturing										
— Machines	*Number*	—	—	26	34	14	74	4	5	10
	Per cent	—	—	(35)	(46)	(19)	(100)			
— Positions	*Number*	—	—	3,769	7,056	1,730	12,555	32	112	50
	Per cent	—	—	(30)	(56)	(14)	(100)			
Looms										
— Shuttle	*Number*	1,476	1,390	5,322	1,002	405	9,595	12	—	—
	Per cent	(15)	(15)	(56)	(10)	(4)	(100)			
— Shuttleless	*Number*	—	—	216	1,093	742	2,051	119	140	370
	Per cent	—	—	(11)	(53)	(36)	(100)			

Table 3 (end)

AGE OF EQUIPMENT IN THE TEXTILE INDUSTRY[1]

In numbers and per cent

Type of equipment		More than 30 years	20-30 years	10-19 years	5-9 years	Less than 5 years	TOTAL	Number planned 1982	Number installed 1982	Number planned 1983
Total looms	*Number*	1,476	1,390	5,538	2,095	1,147	11,646	131	140	370
	Per cent	(13)	(12)	(47)	(18)	(10)	(100)			
Shuttle looms	*% of total*	(100)	(100)	(96)	(48)	(35)	(82)			
Shuttleless looms	*% of total*	—	—	(4)	(52)	(65)	(18)			
Dyeing and printing	*Number*	26	121	226	125	82	580	20	18	29
	Per cent	(4)	(21)	(39)	(22)	(14)	(100)			
Other	*Number*	17	92	261	142	311	823	72	100	102
	Per cent	(2)	(11)	(32)	(17)	(38)	(100)			
Total, all types	***Number***	**1,786**	**2,442**	**8,023**	**2,973**	**2,239**	**17,463**	**272**	**411**	**621**
	Per cent	**(10)**	**(14)**	**(46)**	**(17)**	**(13)**	**(100)**			

[1] Does not include coated fabrics; knitted fabrics; hosiery; cordage, rope and twine; handbags; work gloves; all of which use different types of equipment.
SOURCE: Textile and Clothing Board.

Table 4

PLANNED INSTALLATIONS (1981, 1982, 1983) AND EQUIPEMENT INSTALLED (1980, 1981, 1982) IN THE TEXTILE INDUSTRY

Number of machines

	Planned installations			Equipment installed		
Type of equipment	**1981**	**1982**	**1983**	**1980**	**1981**	**1982**
Cards	71	2	18	8	39	17
Spinning frames	32	19	40	28	55	59
Winders	51	16	31	17	63	52
Twisters	18	8	21	28	13	20
Texturing	2	4	10	10	21	5
Looms	311	131	370	198	294	140
Dyeing and printing	21	20	29	24	9	18
Other	71	72	102	85	143	100
Total, all types	**577**	**272**	**621**	**398**	**637**	**411**

SOURCE: Table 3 and Annual Reports 1981, 1982.

Table 5

AVERAGE COST OF NEW EQUIPMENT INSTALLED IN 1982 IN THE TEXTILE INDUSTRY

In thousand dollars

Type of machine	**Average cost per unit in 1982**
Opening and blending	230.0
Cards	75.0
Ring spinning frames	130.0
Rotor spinning frames	300.0
Winders	110.0
Twisters	80.0
Texturing machines	500.0
Shuttleless looms	95.0
Drying and curing equipment	200.0
Dyeing and printing equipment	175.0
Other finishing equipment	155.0
Other equipment	120.0
Weighted cost, all machines	**115.0**

SOURCE: Textile and Clothing Board.

The coated fabric industry uses equipment which is different from the spinning and weaving equipment. In general the firms in this industry produce very little base fabric. These are rather purchased by the producers who then coat, emboss, dye and finish the fabrics.

Table 6

AGE OF EQUIPMENT IN THE COATED FABRIC INDUSTRY

In numbers and per cent

Type of equipment		More than 30 years	20-30 years	10-19 years	5-9 years	Less than 5 years	TOTAL	Number planned 1982	Number installed 1982	Number planned 1983
Calenders	*Number*	3	5	1	1	—	10	1	—	1
	Per cent	(30)	(50)	(10)	(10)	—	(100)			
Embossing	*Number*	6	3	1	—	2	12	—	—	—
	Per cent	(50)	(25)	(8)	—	(17)	(100)			
Coating	*Number*	12	2	4	4	4	26	2	1	—
	Per cent	(47)	(8)	(15)	(15)	(15)	(100)			
Curing	*Number*	4	1	—	—	—	5	—	2	—
	Per cent	(80)	(20)	—	—	—	(100)			
Dyeing	*Number*	2	3	—	—	—	5	—	—	—
	Per cent	(40)	(60)	—	—	—	(100)			
Other	*Number*	7	3	12	2	21	45	5	—	—
	Per cent	(15)	(7)	(27)	(4)	(47)	(100)			
Total, all types	***Number***	**34**	**17**	**18**	**7**	**27**	**103**	**8**	**3**	**1**
	Per cent	**(33)**	**(16)**	**(17)**	**(7)**	**(27)**	**(100)**			

SOURCE: Textile and Clothing Board

Table 6 shows the age of equipment in the coated fabric industry. Since very little equipment was installed in this industry in 1982 the average age of equipment is essentially the same as last year. In fact, the industry had planned to install eight pieces of equipment in 1982, but only three were actually installed, and only one is planned for 1983.

Table 7 details planned and actual installations of equipment for certain years in the coated fabric industry.

Table 7

PLANNED INSTALLATIONS (1982, 1983)
AND EQUIPMENT INSTALLED (1981, 1982)
IN THE COATED FABRIC INDUSTRY
Number of machines

	Planned installations[1]		**Equipment installed**	
Type of equipment	**1982**	**1983**	**1981**	**1982**
Calenders	1	1	—	—
Embossing	—	—	—	—
Coating	2	—	—	1
Curing	—	—	—	2
Dyeing	—	—	—	—
Other	5	—	6	—
Total, all types	**8**	**1**	**6**	**3**

[1] Planned installations not surveyed in 1981.
SOURCE: Table 6 and Annual Reports 1981, 1982.

The equipment installed in the knitted fabric industry is both very rapid and very versatile. The product range of this industry sector is most extensive, from the simplest jersey to elaborate imitation lace.

Since there has been considerable technical advancement in this industry in recent years, and since the useful life of knitting machines is usually shorter than that of looms, it is not surprising to find newer equipment in this sector than in the woven fabric sector. In the knitted fabric sector, 56 per cent of the equipment is less than 10 years old, and 13 per cent only is more than 20 years old. (Table 8).

Table 8

AGE OF EQUIPMENT IN THE KNITTED FABRIC INDUSTRY

in numbers and per cent

Type of equipment		More than 30 years	20-30 years	10-19 years	5-9 years	Less than 5 years	TOTAL	Number planned 1982	Number installed 1982	Number planned 1983
Winders										
— Machines	*Number*	1	3	8	—	4	16	—	—	—
	Per cent	(6)	(19)	(50)	—	(25)	(100)			
— Spindles	*Number*	64	18	570	—	213	865	—	—	—
	Per cent	(7)	(2)	(66)	—	(25)	(100)			
Warpers	*Number*	1	6	3	25	4	39	—	1	2
	Per cent	(3)	(15)	(8)	(64)	(10)	(100)			
Single knit	*Number*	116	54	131	46	111	458	12	19	13
	Per cent	(25)	(12)	(29)	(10)	(24)	(100)			
Double knit	*Number*	—	8	72	247	70	397	—	4	7
	Per cent	—	(2)	(18)	(62)	(18)	(100)			
Interlock	*Number*	—	—	10	—	21	31	—	—	2
	Per cent	—	—	(32)	—	(68)	(100)			
Sliver knit	*Number*	—	—	53	27	29	109	3	3	—
	Per cent	—	—	(49)	(25)	(26)	(100)			

Table 8 (cont'd)

AGE OF EQUIPMENT IN THE KNITTED FABRIC INDUSTRY

in numbers and per cent

Type of equipment		More than 30 years	20-30 years	10-19 years	5-9 years	Less than 5 years	TOTAL	Number planned 1982	Number installed 1982	Number planned 1983
Total, circular knitting	*Number*	116	62	266	320	231	995	15	26	22
	Per cent	(12)	(6)	(27)	(32)	(23)	(100)			
Tricot	*Number*	—	8	125	68	120	321	2	18	—
	Per cent	—	(3)	(39)	(21)	(37)	(100)			
Raschel	*Number*	—	19	40	35	35	129	10	—	6
	Per cent	—	(15)	(31)	(27)	(27)	(100)			
Simplex	*Number*	—	5	2	4	—	11	—	—	—
	Per cent	—	(46)	(18)	(36)	—	(100)			
Other warp	*Number*	2	—	—	—	2	4	—	2	1
	Per cent	(50)	—	—	—	(50)	(100)			
Total, warp knitting	*Number*	2	32	167	107	157	465	12	20	7
	Per cent	—*	(7)	(36)	(23)	(34)	(100)			
Total, all knitting	*Number*	118	94	433	427	388	1,460	27	46	29
	Per cent	(8)	(6)	(30)	(29)	(27)	(100)			

AGE OF EQUIPMENT IN THE KNITTED FABRIC INDUSTRY

in numbers and per cent

Type of equipment		More than 30 years	20-30 years	10-19 years	5-9 years	Less than 5 years	TOTAL	Number planned 1982	Number installed 1982	Number planned 1983
Dyeing and printing	*Number*	6	17	63	30	19	135	6	2	3
	Per cent	(4)	(13)	(47)	(22)	(14)	(100)			
Drying and curing; tenter frames	*Number*	1	2	26	13	23	65	2	2	2
	Per cent	(2)	(3)	(40)	(20)	(35)	(100)			
Other finishing	*Number*	—	2	39	38	25	104	2	4	—
	Per cent	—	(2)	(38)	(36)	(24)	(100)			
Other	*Number*	21	1	90	65	138	315	13	30	24
	Per cent	(7)	—	(28)	(21)	(44)	(100)			
Total, all types	***Number***	**148**	**125**	**662**	**598**	**601**	**2,134**	**50**	**85**	**60**
	Per cent	**(7)**	**(6)**	**(31)**	**(28)**	**(28)**	**(100)**			

*Negligible.
SOURCE: Textile and Clothing Board.

In 1981 and 1982, new installations in this industry sector were concentrated in knitting machines, both circular and warp knit.

In general, there was much less equipment installed in 1982 than in 1981, even though there were more machines actually installed in 1982 than had been planned. (Table 9). Plans for 1983 call for installation of less machines than in 1982.

Table 9

PLANNED INSTALLATIONS (1982, 1983)
AND EQUIPMENT INSTALLED (1981, 1982)
IN THE KNITTED FABRIC INDUSTRY
Number of machines

	Planned installation[1]		Equipment installed	
Type of equipment	**1982**	**1983**	**1981**	**1982**
Winders	—	—	—	—
Warpers	—	2	—	1
Circular knitting	15	22	17	26
Warp knitting	12	7	24	20
Dyeing and printing	6	3	4	2
Drying and curing; tenter frames	2	2	—	2
Other finishing	2	—	5	4
Other	13	24	96	30
Total, all types	**50**	**60**	**146**	**85**

[1] Planned installations not surveyed in 1981.
SOURCE: Table 8 and Annual Reports 1981, 1982.

2 — Age of Equipment in the "Special" Products Sub-Sectors

As in previous years, under this heading are regrouped the survey results on age of equipment of sub-sectors whose products are subject to quantitative restrictions and are produced on specialized equipment very different from that found in the woven or knitted fabric sectors.

Table 10 shows the age of equipment in the cordage, rope and twine sector. Forty three percent of the equipment in this sector is less than 10 years old, and one quarter (24 per cent), less than 5 years old. The situation in this respect is about the same as two years ago.

The cordage producers have installed very little equipment in 1982: in fact, they installed much less equipment than planned (Table 11) and consequently the average age of equipment has remained substantially the same. However,

Table 10

AGE OF EQUIPMENT IN THE CORDAGE, ROPE AND TWINE INDUSTRY

In numbers and per cent

Type of equipment		More than 30 years	20-30 years	10-19 years	5-9 years	Less than 5 years	TOTAL	Number planned 1982	Number installed 1982	Number planned 1983
Extruders	*Number*	—	—	3	11	4	18	—	—	—
	Per cent	—	—	(17)	(61)	(22)	(100)			
Twisters	*Number*	7	32	35	19	71	164	12	1	1
	Per cent	(4)	(20)	(21)	(12)	(43)	(100)			
Braiders	*Number*	193	—	—	62	65	320	2	—	—
	Per cent	(61)	—	—	(19)	(20)	(100)			
Winders	*Number*	34	13	13	38	5	103	1	1	11
	Per cent	(33)	(13)	(13)	(37)	(4)	(100)			
Rope systems	*Number*	—	15	17	5	24	61	—	2	2
	Per cent	—	(25)	(28)	(8)	(39)	(100)			
Other	*Number*	30	32	8	9	16	95	—	—	—
	Per cent	(32)	(34)	(8)	(9)	(17)	(100)			
Total, all types	***Number***	**264**	**92**	**76**	**144**	**185**	**761**	**15**	**4**	**14**
	Per cent	**(35)**	**(12)**	**(10)**	**(19)**	**(24)**	**(100)**			

SOURCE: Textile and Clothing Board.

the number of machines planned for installation in 1983 is the same as planned earlier for 1982. The low number of new installations in 1982 is likely due to the effects of the recession and the existence of excess plant capacity at that time. In 1981 this industry sector had invested heavily in new twisters and braiders. In 1983, planned investments are concentrated on winders.

Table 11

PLANNED INSTALLATIONS (1981, 1982, 1983) AND EQUIPMENT INSTALLED (1981, 1982) IN THE CORDAGE, ROPE AND TWINE INDUSTRY

Number of machines

	Planned installations			Equipment installed	
Type of equipment	**1981**	**1982**	**1983**	**1981**	**1982**
Extruders	2	—	—	1	—
Twisters	10	12	1	44	1
Braiders	2	2	—	23	—
Winders	—	1	11	—	1
Rope systems	3	—	2	1	2
Other	—	—	—	1	—
Total, all types	**17**	**15**	**14**	**70**	**4**

SOURCE: Table 10 and Annual Reports 1981, 1982.

In terms of production methods and equipment used, the hosiery sector is closer to the clothing industry than to the textile industry. As in the clothing industry the rejuvenation of equipment is continuing on a regular basis. At the end of 1981, 18 per cent of all the machinery in place was less than 5 years old. At the end of 1982 this percentage had gone up slightly, to 20 per cent. In particular, turning machines were quite new: 71 per cent of these were less than five years old in 1982. (Table 12)

Table 13 details planned installations of equipment in comparison with actual installations. The largest number of machines was installed in 1981, that is 231, as compared to 84 in 1982. However, for these two years equipment installed was more numerous than had been originally planned. Plans for 1983 call for less installations of new equipment than in 1982.

The work glove sector is subjected to intense international competition. In this sector, 21 per cent of all the equipment is less than 5 years old, and 74 per cent is less than 10 years old. (Table 14). This is a slight improvement compared to 1981. The work glove sector has installed no new equipment in 1982, even if there were plans to install some machines. Planned installations for 1983 should make up for this, as indicated in Table 15.

Table 12

AGE OF EQUIPMENT IN THE HOSIERY INDUSTRY

In numbers and per cent

Type of equipment		More than 30 years	20-30 years	10-19 years	5-9 years	Less than 5 years	TOTAL	Number planned 1982	Number installed 1982	Number planned 1983
Knitting	*Number*	388	971	952	436	635	3,382	43	70	53
	Per cent	(11)	(29)	(28)	(13)	(19)	(100)			
Boarding	*Number*	—	6	23	19	24	72	—	—	—
	Per cent	—	(8)	(32)	(27)	(33)	(100)			
Seaming	*Number*	—	6	66	29	31	132	2	4	2
	Per cent	—	(5)	(50)	(22)	(23)	(100)			
Turning	*Number*	—	1	—	9	25	35	—	5	—
	Per cent	—	(3)	—	(26)	(71)	(100)			
Other	*Number*	22	33	52	18	55	180	—	5	1
	Per cent	(12)	(18)	(29)	(10)	(31)	(100)			
Total, all types	***Number***	**410**	**1,017**	**1,093**	**511**	**770**	**3,801**	**45**	**84**	**56**
	Per cent	**(11)**	**(27)**	**(29)**	**(13)**	**(20)**	**(100)**			

SOURCE: Textile and Clothing Board.

Table 13

PLANNED INSTALLATIONS (1981, 1982, 1983) AND EQUIPMENT INSTALLED (1981, 1982) IN THE HOSIERY INDUSTRY

Number of machines

	Planned installations			Equipment installed	
Type of equipment	**1981**	**1982**	**1983**	**1981**	**1982**
Knitting	126	43	53	200	70
Boarding	4	—	—	5	—
Seaming	7	2	2	11	4
Turning	1	—	—	3	5
Other	5	—	1	12	5
Total, all types	**143**	**45**	**56**	**231**	**84**

SOURCE: Table 12 and Annual Reports 1981, 1982.

Table 14

AGE OF EQUIPMENT IN THE WORK GLOVE INDUSTRY

In numbers and per cent

Type of equipment		More than 30 years	20-30 years	10-19 years	5-9 years	Less than 5 years	TOTAL	Number planned 1982	Number installed 1982	Number planned 1983
Clicker die-cutting presses	*Number*	—	6	41	18	21	86	1	—	12
	Per cent	—	(7)	(48)	(21)	(24)	(100)			
Sewing	*Number*	—	57	112	533	178	880	5	—	40
	Per cent	—	(6)	(13)	(61)	(20)	(100)			
Turners, formers, blockers	*Number*	—	2	23	19	29	73	2	1	8
	Per cent	—	(3)	(31)	(26)	(40)	(100)			
Knitting	*Number*	—	29	10	27	6	72	—	—	—
	Per cent	—	(40)	(14)	(38)	(8)	(100)			
Other	*Number*	—	3	5	6	6	20	2	—	2
	Per cent	—	(15)	(25)	(30)	(30)	(100)			
Total, all types	***Number***	—	**97**	**191**	**603**	**240**	**1,131**	**10**	**1**	**62**
	Per cent	—	**(9)**	**(17)**	**(53)**	**(21)**	**(100)**			

SOURCE: Textile and Clothing Board.

Table 15

PLANNED INSTALLATIONS (1981, 1982, 1983) AND EQUIPMENT INSTALLED (1981, 1982) IN THE WORK GLOVE INDUSTRY

Number of machines

	Planned installations			Equipment installed	
Type of equipment	**1981**	**1982**	**1983**	**1981**	**1982**
Clicker die-cutting presses	—	1	12	2	—
Sewing	35	5	40	30	—
Turners, formers, blockers	1	2	8	6	1
Knitting	5	—	—	5	—
Other	9	2	2	2	—
Total, all types	**50**	**10**	**62**	**45**	**1**

SOURCE: Table 14 and Annual Reports 1981, 1982.

The handbag sector is, like the hosiery sector, also more closely related to the clothing industry. In the handbag sector, 37 per cent of its equipment was less than 5 years old at the end of 1982, whereas one year earlier, the percentage was 34 per cent. Fusing and cementing machines have the lowest average age in this sector. (Table 16).

In 1982 there were 64 machines installed in the handbag sector, mainly sewing machines. This number was higher than originally planned. However, installation plans for 1983 are less optimistic: new installations planned for 1983 are less than half those for 1982. (Table 17).

To provide an overall picture of the situation, Table 18 shows the distribution of machinery at the end of 1982 in the various industry sectors in terms of percentages of equipment 10 years or older, less than 10 years old, and less than 5 years old. There are differences between sectors which are sometimes quite substantial, but which can be explained partially by the fact that some of these sectors use relatively heavy, expensive equipment, while for some others, the equipment is lighter and less expensive.

In considering the textile machinery of all the sectors together, there has been a gradual improvement since 1980 in the age of equipment. The proportion of machines 10 years old or more has decreased from 76 per cent in 1980 to 73 per cent in 1981 and 70 per cent in 1982. Similarly, the percentage of machines less than 5 years old has increased from 7 to 10 per cent and then to 13 per cent during the same years.

Table 16

AGE OF EQUIPMENT IN THE HANDBAG INDUSTRY

In numbers and per cent

Type of equipment		More than 30 years	20-30 years	10-19 years	5-9 years	Less than 5 years	TOTAL	Number planned 1982	Number installed 1982	Number planned 1983
Clicker die-cutting presses	*Number*	—	—	22	25	26	73	5	7	4
	Per cent	—	—	(30)	(34)	(36)	(100)			
Sewing	*Number*	—	23	135	172	169	499	50	42	7
	Per cent	—	(5)	(27)	(34)	(34)	(100)			
Framing	*Number*	—	—	15	9	16	40	—	—	—
	Per cent	—	—	(38)	(22)	(40)	(100)			
Fusing, cementing	*Number*	—	5	29	19	46	99	—	6	7
	Per cent	—	(5)	(29)	(19)	(47)	(100)			
Other	*Number*	—	2	11	11	31	55	3	9	6
	Per cent	—	(4)	(20)	(20)	(56)	(100)			
Total, all types	***Number***	—	**30**	**212**	**236**	**288**	**766**	**58**	**64**	**24**
	Per cent	—	**(4)**	**(28)**	**(31)**	**(37)**	**(100)**			

SOURCE: Textile and Clothing Board.

Table 17

PLANNED INSTALLATIONS (1981, 1982, 1983) AND EQUIPMENT INSTALLED (1981, 1982) IN THE HANDBAG INDUSTRY

Number of machines

	Planned installations			Equipment installed	
Type of equipment	**1981**	**1982**	**1983**	**1981**	**1982**
Clicker die-cutting presses	1	5	4	11	7
Sewing	16	50	7	42	42
Framing	—	—	—	4	—
Fusing, cementing	—	—	7	12	6
Other	—	3	6	5	9
Total, all types	**17**	**58**	**24**	**74**	**64**

SOURCE: Table 16 and Annual Reports 1981, 1982.

Table 18

AGE OF ALL MACHINES SURVEYED IN THE TEXTILE AND "SPECIAL" PRODUCTS SECTOR, 1982

In per cent

Sectors	10 years and more	less than 10 years	less than 5 years
Acrylic yarns, worsted spun	33	67	45
Cotton and polyester-cotton yarns	69	31	22
Man-made yarns and blends (rayon, nylon, polyester, cotton-spun acrylic)	52	48	24
Man-made fabrics	68	32	16
Cotton and polyester-cotton fabrics, corduory and denims	80	20	6
Woollen and worsted fabrics	59	41	10
Towels	56	44	34
Sheets and pillowcases	75	25	7
Coated fabrics	67	33	26
Dyeing and printing	60	40	15
Miscellaneous textile products	61	39	13
Total, all textile machinery above	**70**	**30**	**13**
Knitted fabrics	44	56	28
Cordage, rope and twine	57	43	24
Hosiery	66	34	20
Work gloves	25	75	21
Handbags (of textiles)	32	68	38

SOURCE: Textile and Clothing Board.

3 — Age of Equipment in the Clothing Industry

The manufacture of clothing involves three major production operations: fabric cutting, garment assembly (sewing), and garment shaping (pressing).

In the last twenty years considerable technical progress has been achieved in the equipment for each of these operations.

Pattern marking, grading and reproduction can now be completely automated, at the same time ensuring optimum utilization of fabrics. New equipment allows faster spreading of the fabric for cutting while still maintaining exact super-imposition of the fabric layers. Suction tables allow a greater number of fabric layers to be spread and then compressed to achieve more precise cutting. The cutting process itself can be entirely computer controlled.

Automated machines can now sew buttonholes, attach patch pockets and belt loops, or sew all the buttons, with the operator having only to load and unload the machine, and ensure that it is functioning properly.

Sewing machine speeds in terms of stitches per minute have doubled. Some machines are completely automated. Others are equipped with accessories for automatic needle positioning and thread cutting. Also, fusing is increasingly replacing sewing in the assembly operation. Finally, there has been remarkable progress in the development of conveyor systems to carry garments and parts between work stations, thus cutting down substantially the time required to load and unload machines.

In the garment shaping operation, automated steam pressing is gradually replacing manual pressing.

However, the introduction of faster and more automated equipment is practical only in the large scale production of standardized products. The number of these products is relatively limited, particularly in a small market such as the Canadian market. Moreover, when fashion plays an important role, as for example in the ladies' wear sector, large scale production is largely excluded, and the small, versatile firm is best for this type of production. In the latter case, the introduction of new technologies requiring large production volumes is not practical, and competitive ability is then achieved through superior design and quality of the finished product. In spite of these constraints the clothing industry has been constantly improving its equipment in the last few years.

Table 19 details the age of equipment in this industry.

The average age of equipment is evidently strongly influenced by the age of sewing machines which account for more than 80 per cent of the total number of machines in this industry. In 1982, 43 per cent of the sewing machines in this industry were less than 5 years old. In 1980, the corresponding percentage was 39 per cent. This represents therefore a distinct improvement in the age of the main equipment of this industry. In fact, investment has been heavier in faster and more automated specialized sewing machines. In 1980 these represented only 25 per cent of all sewing machines, while in 1982 this proportion had increased to 29 per cent. In addition, while in 1980 only 48 per cent of these machines were less than 5 years old, there were 57 per cent in that category in 1982.

The equipment category with the highest proportion of equipment less than 5 years old is that of material handling systems: in 1982, 79 per cent, or 4 out of 5 systems, were less than 5 years old. It is also in this category that equipment renewal has been most evident: in 1980, 68 per cent of the material handling equipment was less than 5 years old. In 1982 this proportion climbed to 79 per cent.

In descending proportion of equipment less than 5 years old in the other categories, material handling (79 per cent) is followed by fusing equipment (76 per cent), marking and grading equipment (71 per cent), pressing equipment (47 per cent), and cutting room equipment (46 per cent).

The knitting machine category has the smallest proportion of machines less than 5 years old, at 22 per cent. This proportion has improved since 1980, when it was 18 per cent. Also, in 1982, 52 per cent of the knitting machines were less than 10 years old.

As to the average age distribution of the equipment in the various industry sectors (Table 20), the percentage of equipment less than 5 years old is above the average for the industry (43 per cent) in the following sectors: ladies' blouses, shirts, T-shirts and sweatshirts (54 per cent); pants, shorts and overalls (50 per cent); pyjamas and sleepwear (46 per cent); outerwear (46 per cent); and men's structured suits and jackets (45 per cent).

The sectors where the proportion of equipment less than 5 years old is below the industry average (43 per cent) are as follows: men's shirts (42 per cent); underwear (40 per cent); ladies' dresses, skirts and sportswear (39 per cent); sweaters, pullovers and cardigans (37 per cent); jackets, overcoats and topcoats, leather coats and jackets (33 per cent); swimwear (32 per cent); raincoats (29 per cent); and foundation garments (26 per cent).

Finally, the proportion of equipment less than five years old has shown the greatest improvement since 1980 in those industry sectors where this proportion was the lowest at that time.

Table 21 shows the average cost of equipment installed in 1982 in the clothing industry. This average cost is less than that for equipment installed in 1981, and slightly higher than that for 1980. Compared to 1981, the average cost of knitting machines is the one which showed the greatest increase in 1982.

AGE OF EQUIPMENT IN THE CLOTHING INDUSTRY

In numbers and per cent

Type of equipment		More than 30 years	20-30 years	10-19 years	5-9 years	Less than 5 years	Less than 10 years	TOTAL	Installed in 1982
Pattern marking and grading	*Number*	—	2	19	37	140	177	198	11
	Per cent	—	(1)	(10)	(18)	(71)	(89)	(100)	(6)
Cutting room	*Number*	24	64	305	522	794	1,316	1,709	59
	Per cent	(1)	(4)	(18)	(31)	(46)	(77)	(100)	(3)
Plain sewing machines	*Number*	388	1,320	7,207	9,228	11,182	20,410	29,325	323
	Per cent	(1)	(5)	(25)	(31)	(38)	(69)	(100)	(1)
Specialized sewing machines	*Number*	32	163	1,583	3,475	6,832	10,307	12,085	759
	Per cent	—*	(1)	(13)	(29)	(57)	(86)	(100)	(6)
Total sewing machines	*Number*	420	1,483	8,790	12,703	18,014	30,717	41,410	1,082
	Per cent	(1)	(4)	(21)	(31)	(43)	(74)	(100)	(3)
Plain sewing machines as a % of total		(92)	(89)	(82)	(73)	(62)	(66)	(71)	(30)
Specialized sewing machines as a % of total		(8)	(11)	(18)	(27)	(38)	(34)	(29)	(70)
Fusing	*Number*	7	2	7	39	177	216	232	12
	Per cent	(3)	(1)	(3)	(17)	(76)	(93)	(100)	(5)

AGE OF EQUIPMENT IN THE CLOTHING INDUSTRY

In numbers and per cent

Type of equipment		More than 30 years	20-30 years	10-19 years	5-9 years	Less than 5 years	Less than 10 years	TOTAL	Installed in 1982
Material handling	*Number*	1	4	37	91	498	589	631	69
	Per cent	—*	(1)	(6)	(14)	(79)	(93)	(100)	(11)
Plain steam pressing equipment	*Number*	22	49	358	634	602	1,236	1,665	43
	Per cent	(1)	(3)	(22)	(38)	(36)	(74)	(100)	(3)
Specialized steam pressing equipment	*Number*	—*	15	191	203	733	936	1,142	28
	Per cent	—	(1)	(17)	(18)	(64)	(82)	(100)	(2)
Total pressing equipment	*Number*	22	64	549	837	1,335	2,172	2,807	71
	Per cent	(1)	(2)	(20)	(30)	(47)	(77)	(100)	(3)
Plain pressing equipment as a % of total		(100)	(77)	(65)	(76)	(45)	(57)	(59)	(61)
Specialized pressing equipment as a % of total		—	(23)	(35)	(24)	(55)	(43)	(41)	(39)
Circular knitting machines	*Number*	375	174	313	434	385	819	1,681	19
	Per cent	(22)	(10)	(19)	(26)	(23)	(49)	(100)	(1)
Flat knitting machines	*Number*	20	53	249	302	152	454	776	11
	Per cent	(2)	(7)	(32)	(39)	(20)	(59)	(100)	(1)

Table 19 (end)

AGE OF EQUIPMENT IN THE CLOTHING INDUSTRY

In numbers and per cent

Type of equipment		More than 30 years	20-30 years	10-19 years	5-9 years	Less than 5 years	Less than 10 years	TOTAL	Installed in 1982
Total knitting machines	*Number*	395	227	562	736	537	1,273	2,457	30
	Per cent	(16)	(9)	(23)	(30)	(22)	(52)	(100)	(1)
Circular knitting machines as a % of total		(95)	(77)	(56)	(59)	(72)	(64)	(68)	(63)
Flat knitting machines as a % of total		(5)	(23)	(44)	(41)	(28)	(36)	(32)	(37)
Total, all types	***Number***	**869**	**1,846**	**10,269**	**14,965**	**21,495**	**36,460**	**49,444**	**1,334**
	Per cent	**(2)**	**(4)**	**(21)**	**(30)**	**(43)**	**(73)**	**(100)**	**(3)**

*Negligible.

SOURCE: Textile and Clothing Board.

Table 20

AGE OF ALL MACHINES SURVEYED IN THE VARIOUS SECTORS OF THE CLOTHING INDUSTRY

1982

In per cent

Sectors	10 years and more	Less than 10 years	Less than 5 years
Pyjamas and sleepwear	14	86	46
Outerwear	18	82	46
Pants, shorts and overalls	20	80	50
Ladies' blouses, shirts, T-shirts and sweatshirts	21	79	54
Men's structured suits and jackets	21	79	45
Sweaters, pull-overs and cardigans	25	75	37
Ladies' dresses, skirts and sportswear, unstructured suits	26	74	39
Swimwear	29	71	32
Jackets, overcoats and topcoats, leather coats and jackets	31	69	33
Men's tailored collar shirts	36	64	42
Underwear	37	63	40
Raincoats	49	51	29
Foundation garments	59	41	26
Weighted percentage, 13 sectors	**26**	**74**	**43**

SOURCE: Textile and Clothing Board.

Table 21

AVERAGE COST OF EQUIPMENT INSTALLED IN THE CLOTHING INDUSTRY IN 1982

In thousand dollars

Type of equipment	Average cost per unit in 1982
Pattern marking and grading	82.9
Circular knitting machines	60.4
Conveyor systems	7.2
Flat knitting machines	65.2
Specialized steam pressing equipment	9.8
Fusing equipment	6.9
Ordinary steam pressing equipment	5.0
Cutting equipment	8.2
Specialized sewing machines	3.9
Plain sewing machines	1.9
Weighted average, all machines	**5.9**

SOURCE: Textile and Clothing Board.

Table 22 details actual capital investments in 1982 compared to planned investments for the same year, for the firms which were part of both last year's and this year's survey sample. These firms had planned to invest in 704 new machines at a cost of $6,606,919 and other unspecified equipment for $2,082,500. In fact, actual investments were made for 1,313 machines at a cost of $7,878,096.

Table 23 shows actual capital investments in 1982 against planned investments in 1983 for all the firms included in this year's survey. They are planning to invest substantially less in 1983 than in 1982, that is, to invest in 813 machines (instead of 1,334) at a cost of $5,140,869 (instead of $7,079,869). It should be noted that the firms in the 1982 sample (301 instead of 292 for this year's sample) had invested in 2,938 machines in 1981, at a cost of $20,913,214.

Table 22

CLOTHING MANUFACTURERS' CAPITAL EXPENDITURES ON EQUIPMENT 1982 PLANNED VERSUS 1982 ACTUAL (EXCLUDING 25 NEW FIRMS ADDED IN 1982 SURVEY)

	Planned expenditures 1982		Actual expenditures 1982		Difference	
Type of equipment	Number of machines	Cost $	Number of machines	Cost $	Number of machines	Cost $
Pattern marking and grading	7	575,600	11	912,001	+4	+336,401
Cutting room	34	561,485	58	467,892	+24	-93,593
Sewing — plain	207	623,800	318	613,500	+111	-10,300
Sewing — specialized	355	2,355,634	744	2,949,198	+389	+593,564
Fusing	7	332,900	12	83,025	+5	-249,875
Pressing — plain	25	238,600	43	216,906	+18	-21,694
Pressing — specialized	12	92,000	28	273,220	+16	+181,220
Material handling	18	1,133,900	69	496,779	+51	-637,121
Knitting — circular	34	338,000	19	1,147,915	-15	+809,915
Knitting — flat	5	355,000	11	717,660	+6	+362,660
Total specified	704	6,606,919	1,313	7,878,096	+609	+1,271,177
Total non-specified	—	2,082,500	—	—	—	-2,082,500
Grand Total	—	**8,689,419**	—	**7,878,096**	—	**-811,323**

SOURCE: Textile and Clothing Board.

Table 23

CLOTHING MANUFACTURERS' CAPITAL EXPENDITURES ON EQUIPMENT 1983 PLANNED VERSUS 1982 ACTUAL (ALL FIRMS SURVEYED)

	Planned expenditures 1983		Actual expenditures 1982		Difference	
Type of equipment	Number of machines	Cost $	Number of machines	Cost $	Number of machines	Cost $
Pattern marking and grading	2	133,000	11	912,001	−9	−779,001
Cutting room	33	865,004	59	485,892	−26	+379,112
Sewing — plain	373	568,900	323	625,000	+50	−56,100
Sewing — specialized	273	1,667,100	759	2,969,198	−486	−1,302,098
Fusing	5	41,000	12	83,025	−7	−42,025
Pressing — plain	70	63,200	43	216,906	+27	−153,706
Pressing — specialized	18	337,500	28	273,220	−10	+64,280
Material handling	17	247,165	69	496,779	−52	−249,614
Knitting — circular	20	727,000	19	1,147,915	+1	−420,915
Knitting — flat	2	491,000	11	717,660	−9	−226,660
Total specified	813	5,140,869	1,334	7,927,596	−521	−2,786,727
Total non-specified	—	1,939,000	—	—	—	+1,939,000
Grand Total	—	**7,079,869**	—	**7,927,596**	—	**−847,727**

SOURCE: Textile and Clothing Board.

Since the firms included in the Board's survey are not the same from year to year because some firms disappear and have to be replaced by other new firms; since the Board had also added a number of small firms to the sample because in the Board's opinion these were under-represented in the sample, these data cannot represent the exact investments (in terms of both numbers of machines and funds committed) made each year by the whole clothing industry, nor do they provide complete continuity in the data from one year to the next. Nevertheless, in the Board's opinion, they provide a valid picture of the evolution of both physical and financial investments of the industry for equipment. It can therefore be stated without too much risk of error that the clothing industry expects to invest in equipment in 1983 only one third of what it spent in 1981; that it has invested considerably less in 1982 than in 1981; and that in 1982 it has invested somewhat less than originally planned.

4 — Age of Equipment of Contracting Firms

In its 1981 Annual Report the Board outlined the particular characteristics of contracting firms. Generally, these are firms whose activities are limited to sewing or assembly operations. They are highly specialized in terms of the type of products which they assemble and the price points for these garments.

They do not own the fabrics which they sew on contract for the clothing manufacturer. Neither do they own the finished products nor become involved in their sale. Their dependence on manufacturers who supply them with the fabrics already cut to be assembled often results in marginal and seasonal operations for these firms.

In the same Report, the Board underlined the difficulties encountered in determining the exact number of contracting firms. Statistics Canada counted 459 firms in 1981, recognizing however that there were probably more. For its part, the Board considers it reasonable to assume that their number varies with the economic situation and that it is of the order of 500 to 600.

The 1981 survey sample included 78 firms, or about 15 per cent of the probable universe. The Board recognized that this sample was biased towards the major contractors and favoured the traditional contracting sub-sectors: those of ladies' dresses and skirts, pants and jeans, and ladies' blouses and shirts.

Twelve of the contractors in the 1981 sample had disappeared at the time of the 1982 survey, following the recession which started early in the second half of 1981. As a result, the number of contractors included in the 1982 survey was decreased to 66 firms, thus modifying the sample in terms of its size and of the products of the firms included in it. To compensate, the Board added 16 new firms in 1983 to the firms remaining from the previous year's sample.

Table 24 gives the age, in terms of age range, of the major types of equipment utilized by the contractors of this new sample. About 60 per cent of the contractors' equipment overall is less than 5 years old. This overall percentage is strongly influenced by the percentage for sewing machines, which are by far the most numerous pieces of equipment utilized by contractors and clothing manufacturers. In fact, this percentage for contractors compares favourably with that for manufacturers (43 per cent).

The category for conveyor systems is the one with the newest equipment: 85 per cent of this equipment is less than 5 years old.

Table 25 compares the capital expenditures which the 66 firms in last year's sample had originally planned to make in 1982, and the expenditures which they actually made in that year. In 1982 these firms installed 279 machines while they had planned to install only 102, and they actually spent $839,523, while their plans called for expenditures of only $520,100. The most important capital expenditures were made for specialized sewing machines and for pressing equipment.

Table 24

AGE OF EQUIPMENT IN CONTRACTING FIRMS

In numbers and per cent

Type of equipment		More than 30 years	20-30 years	10-19 years	5-9 years	Less than 5 years	Less than 10 years	TOTAL	Installed in 1982
Pattern marking and grading	*Number*	—	—	—	3	3	6	6	—
	Per cent	—	—	—	(50)	(50)	(100)	(100)	—
Cutting room	*Number*	—	3	4	13	46	59	66	1
	Per cent	—	(4)	(6)	(20)	(70)	(90)	(100)	(2)
Plain sewing machines	*Number*	21	80	387	1,197	1,999	3,196	3,684	42
	Per cent	(1)	(2)	(10)	(33)	(54)	(87)	(100)	(1)
Specialized sewing machines	*Number*	2	11	55	394	1,219	1,613	1,681	222
	Per cent	—*	(1)	(3)	(23)	(73)	(96)	(100)	(13)
Total sewing machines	*Number*	23	91	442	1,591	3,218	4,809	5,365	264
	Per cent	—*	(2)	(8)	(30)	(60)	(90)	(100)	(5)
Plain sewing machines as a % of total		(91)	(88)	(88)	(75)	(62)	(66)	(69)	(16)
Specialized sewing machines as a % of total		(9)	(12)	(12)	(25)	(38)	(34)	(31)	(84)
Fusing	*Number*	—	—	3	8	11	19	22	—
	Per cent	—	—	(14)	(36)	(50)	(86)	(100)	—

Tableau 24 (cont'd)

AGE OF EQUIPMENT IN CONTRACTING FIRMS

In numbers and per cent

Type of equipment		More than 30 years	20-30 years	10-19 years	5-9 years	Less than 5 years	Less than 10 years	TOTAL	Installed in 1982
Material handling	*Number*	—	—	2	—	11	11	13	8
	Per cent	—	—	(15)	—	(85)	(85)	(100)	(62)
Plain steam pressing equipment	*Number*	1	8	39	89	98	187	235	9
	Per cent	—*	(3)	(17)	(38)	(42)	(80)	(100)	(4)
Specialized steam pressing equipment	*Number*	8	1	13	69	110	179	201	17
	Per cent	(4)	—*	(7)	(34)	(55)	(89)	(100)	(8)
Total, pressing equipment	*Number*	9	9	52	158	208	366	436	26
	Per cent	*(2)*	*(2)*	*(12)*	*(36)*	*(48)*	*(84)*	*(100)*	*(6)*
Plain pressing equipment as a % of total		(11)	(89)	(75)	(56)	(47)	(51)	(54)	(35)
Specialized pressing equipment as a % of total		(89)	(11)	(25)	(44)	(53)	(49)	(46)	(65)
Total, all types	***Number***	**32**	**103**	**503**	**1,773**	**3,497**	**5,270**	**5,908**	**299**
	Per cent	**—***	**(2)**	**(9)**	**(30)**	**(59)**	**(89)**	**(100)**	**(5)**

*Negligible.

SOURCE: Textile and Clothing Board.

Table 25

CLOTHING CONTRACTORS' CAPITAL EXPENDITURES ON EQUIPMENT 1982 PLANNED VERSUS 1982 ACTUAL (EXCLUDING 16 NEW FIRMS ADDED IN 1982 SURVEY)

	Planned expenditures 1982		Actual expenditures 1982		Difference	
Type of equipment	**Number of machines**	**Cost $**	**Number of machines**	**Cost $**	**Number of machines**	**Cost $**
Cutting room	—	—	1	1,215	+1	+1,215
Sewing - plain	62	249,600	28	36,831	−34	−212,769
Sewing - specialized	35	219,000	217	588,222	+182	+369,222
Fusing	—	—	—	—	—	—
Pressing — plain	3	16,500	9	13,400	+6	−3,100
Pressing — specialized	2	35,000	16	197,255	+14	+162,255
Material handling	—	—	8	2,600	+8	+2,600
Total	**102**	**520,100**	**279**	**839,523**	**+177**	**+319,423**

SOURCE: Textile and Clothing Board.

Table 26 details the capital expenditures planned for 1983 by the 82 firms included in this year's sample, as well as actual expenditures made by these firms in 1982. They installed 299 machines in 1982, mostly sewing machines, but also pressing equipment and conveyor systems. For 1983 these same firms plan to install only 58 machines at a cost of $209,550, compared to their actual expenditures for 1982 amounting to $870,903. This represents a considerable reduction. However, it must be remembered that the 78 firms of the 1980 survey sample, of which 66 are still included in this year's sample, had installed 657 machines in 1980.

Table 26

CLOTHING CONTRACTORS' CAPITAL EXPENDITURES ON EQUIPMENT 1982 ACTUAL VERSUS 1983 PLANNED (ALL FIRMS SURVEYED)

	Actual expenditures 1982		Planned expenditures 1983		Difference	
Type of equipment	**Number of machines**	**Cost $**	**Number of machines**	**Cost $**	**Number of machines**	**Cost $**
Cutting room	1	1,215	—	—	−1	−1,215
Sewing — plain	42	59,531	25	48,000	−17	−11,531
Sewing — specialized	222	595,722	25	67,350	−197	−528,372
Fusing	—	—	3	13,200	+3	+13,200
Pressing — plain	9	13,400	3	6,000	−6	−7,400
Pressing — specialized	17	198,435	1	25,000	−16	−173,435
Material handling	8	2,600	1	50,000	−7	+47,400
Total	**299**	**870,903**	**58**	**209,550**	**−241**	**−661,353**

SOURCE: Textile and Clothing Board.

It appears therefore that since 1980 the contractors have made gradually lesser capital expenditures and that they intend to continue this trend in 1983.

To conclude, it can be said that since 1981, equipment has been gradually renewed in the textile and clothing industries. In 1982 this renewal process was slowed down because of the economic situation. However, capital expenditure intentions for 1983 are more optimistic than they were for 1982.

Appendices
Part 1
Imports by Category of Importers

IMPORTS BY CATEGORY OF IMPORTERS
BY CONTROL NUMBER
IN UNITS OF CLOTHING
(firms importing 1000 units or more)

		CONTROL CATEGORY																		
Year	No. of Firms	32 Winter Outerwear	37 Pants, Slacks	38 Unstructured Suits	39 Blouses	40 Pyjamas and Sleepwear	41 Raincoats	42 Dresses, Skirts, Coordinates, Ladies Suits	43 Foundation Garments	44 Swimsuits	45 Underwear	46 Outer Jackets	47 Structured Suits, Sportcoats Blazers	48 Leather Jackets	49 Shirts	50 Sweaters	Total for Category of importer	Per cent Total imports
MANUFACTURERS																				
1978	178	225.419	4.100.818	62.155	7.071.196	931.346	70.813	1.472.890	1,235.148	881.700	3.289.898	681.481	32.917	1,452	2,492,721	1,972,161	24,522,115	16.4
1979	200	453.240	4.353.330	85.236	6.801.687	1,092.645	195.113	1.547.109	1.446.180	721.868	4.125.717	1.011.197	197.638	7.501	2.870.640	1,964.264	26.873.365	17.3
1980	222	194.488	4.464.650	now	5.729.412	597.588	305.451	1.816.577	866.124	626.066	2.466.616	1.097.279	66.388	now	2.925.236	2,940.438	24,096,313	18.6
1981	234	316.374	4.306.930	included	6.119.417	878.129	194.055	2.288.395	1,427.700	467.028	3.058.105	1.884.663	89.948	included	4.095.421	3,749.721	28.875.886	18.8
1982	246	248.614	2.996.598	in 42	6.473.123	1.011.335	130.707	1.700.604	1,062.432	396.456	3.092.187	2.516.604	307.502	in 46	5.958.033	3,994.456	29.888.651	19.5
RETAILERS																				
1978	274	174.408	3.135.783	38.659	4.998.587	686.550	95.085	1.641.247	189.360	288.834	1.428.402	581.632	88.184	16.873	1.650.456	3.139.107	18.153.167	12.1
1979	296	370.666	2.863.155	36.573	5.800.185	988.422	57.538	2.231.659	261.336	272.952	1.317.168	589.851	42.634	17.290	2.155.980	3.832.977	20.838.386	13.4
1980	354	349.042	2.474.237	now	5.062.746	801.485	66.558	1.811.745	209.352	359.024	1.270.902	769.740	47.181	now	2.512.792	3.714.194	19.448.998	15.0
1981	377	212.995	3.411.256	included	7.167.145	1.075.257	151.972	2.540.485	236.628	324.588	2.030.314	1.130.486	61.963	included	2.854.967	4.843.703	26.041.759	16.9
1982	394	263.094	2.863.491	in 42	6.999.341	989.743	153.064	2.383.294	156.528	398.860	1.577.702	1.295.583	73.448	in 46	2.371.073	4.709.134	24.234.355	15.8
IMPORTERS/WHOLESALERS																				
1978	310	900.758	13.207.904	202.032	34.089.447	2.581.143	994.204	5.448.176	110.148	1.098.184	5.674.968	1.989.519	413.664	6.419	8.788.053	13.583.352	89.087.971	59.7
1979	341	1.340.136	12.960.494	220.921	30.947.616	3.691.169	1.213.311	6.933.660	458.688	1.614.785	6.883.288	2.683.583	484.821	7.609	8.853.212	10.466.524	88.759.817	57.1
1980	349	790.343	10.357.716	now	22.154.802	2.241.552	1.075.569	5.527.893	633.396	1.612.558	7.558.475	2.733.043	430.096	now	7.127.850	9.055.382	71.298.675	54.9
1981	369	743.361	12.210.530	included	26.421.536	2.444.873	826.317	6.540.259	207.360	2.000.058	7.798.275	3.460.604	194.175	included	6.353.450	10.074.063	79.274.861	51.6
1982	421	816.313	12.017.065	in 42	24.254.234	2.478.590	700.012	7.175.823	140.760	2.130.984	7.547.656	3.903.852	163.723	in 46	6.999.879	9.410.372	77.739.263	50.7
OTHER																				
1978	566	141.768	1.397.117	49.910	6.237.393	119.213	309.276	2.067.053	138.732	113.232	1.669.199	586.553	74.572	6.887	858.788	3.879.295	17.648.988	11.8
1979	650	111.504	2.065.934	106.887	7.076.674	143.004	151.496	2.609.040	143.652	105.739	1.208.215	620.540	51.760	9.428	1.640.903	3.003.997	19.048.773	12.2
1980	658	66.161	2.639.624	now	4.068.903	141.979	192.524	1.728.904	117.084	85.113	1.179.278	723.002	36.435	now	1.372.449	2.604.294	14.955.750	11.5
1981	709	119.399	3.214.571	included	6.101.113	478.641	183.991	2.637.862	93.120	56.309	924.152	878.824	35.859	included	1.640.762	3.199.691	19.564.294	12.7
1982	645	216.786	4.252.949	in 42	5.999.305	204.115	151.757	2.533.045	73.416	52.963	1.432.332	1.519.515	58.622	in 46	2.043.921	2.984.154	21.522.880	14.0

1980, 1981 Statistics Canada revisions.

APPENDIX I-2

IMPORTS BY CATEGORY OF IMPORTERS BY CONTROL NUMBER BY VALUE (FIRMS IMPORTING 1000 UNITS OR MORE)

Values in thousands of dollars

Year	No. of Firms	32 Winter Outerwear	37 Pants, Slacks	38 Unstructured Suits	39 Blouses	40 Pyjamas and Sleepwear	41 Raincoats	42 Dresses, Skirts, Coordinates, Ladies Suits	43 Foundation Garments	44 Swimsuits	45 Underwear	46 Outer Jackets	47 Structured Suits, Sportcoats Blazers	48 Leather Jackets	49 Shirts	50 Sweaters	Total for Category of importer1	Per cent Total Imports
		CONTROL CATEGORY																
MANUFACTURERS																		
1978	178	2.740	24.869	612	18.424	2.828	649	9,667	2,121	1,988	1.461	6,467	522	60	7.146	8,925	88,207	18.2
1979	200	6,799	26,020	1.453	23.459	3,598	1,413	11,527	2,910	2.204	1,985	12,717	3,898	283	11,489	10,578	120,337	19.7
1980	222	3.410	29,091	now	21.023	2.616	3.478	16,264	1.820	2,635	1.399	14,250	1,532	now	12,641	17,663	127,821	21.7
1981	234	4.725	25.574	included	25,775	3,632	1.881	20,150	2,710	1.710	2,160	23,749	2,190	included	19,037	24,374	157,666	21.5
1982	246	4.034	18,206	in 42	28.567	4.142	2,050	18,483	1,809	1,338	1.971	30,501	9,039	in 46	26,088	26,098	172,328	22.3
RETAILERS																		
1978	274	1,861	11,091	483	12.412	2.576	568	15,054	495	686	1,474	6,858	2,592	1,852	4.892	16,519	79,410	16.4
1979	296	5,141	11,391	549	18,303	4.140	665	19,025	710	846	1.462	9.332	1.198	1.879	7.906	21,241	103,795	17.1
1980	354	4.999	13.233	now	20.077	3,626	944	23,159	722	1.008	1.432	11.992	1,706	now	10,644	24,424	117,966	20.0
1981	377	3,620	18.512	included	28.483	5.078	1,044	29,938	806	1.068	2,399	15.419	1,728	included	13,155	33,349	154,599	21.1
1982	394	4,738	15,093	in 42	28,867	4.635	1.026	27,176	592	1.082	2.089	20.838	2,359	in 46	11.605	33,648	153,748	19.9
IMPORTERS/WHOLESALERS																		
1978	310	9.937	39.003	2.447	64.050	6.141	3,410	32,858	252	2.226	3.926	13.700	10.945	468	20,364	44,799	254,534	52.6
1979	341	18.897	47.869	2.959	70.389	9.415	4.350	39,654	1,036	3,325	4.648	23,216	14.912	459	24.678	38.338	304,157	50.0
1980	349	10.558	40.874	now	54.686	6.573	4.015	34.054	1,477	3.456	5.077	23.397	14.850	now	24.955	42.120	266,093	45.2
1981	369	9.566	55.923	included	71.308	7.631	2.469	40.470	796	4.044	4.971	31.026	7,623	included	22,948	54.035	312,810	42.6
1982	421	11.372	57.888	in 42	69.350	7.337	2.526	43.705	718	3.938	4,897	36,653	6.061	in 46	25.868	52,075	322,388	41.8
OTHER																		
1978	566	2.176	6.018	498	13.081	595	660	15,303	470	418	1,353	4,413	2,123	671	2.878	11,227	61,891	12.8
1979	650	2.208	8.938	1.297	18,359	796	548	20.695	511	345	1.246	6,206	1.517	631	6,179	10.773	80.256	13.2
1980	658	1,334	13,372	now	14.159	801	872	17.352	338	236	968	7.164	1,192	now	6.080	13,427	77,295	13.1
1981	709	1.964	18.325	included	23,267	760	900	24.991	350	220	1.102	8,546	1,453	included	7,858	18.864	108.600	14.8
1982	645	3,876	22,973	in 42	23.469	937	885	25,483	338	207	1,134	15,941	1,872	in 46	9.436	16,563	123.113	16.0

1 Totals may not add due to rounding.

1980, 1981 Statistics Canada revisions.

IMPORTS BY CATEGORY OF IMPORTERS BY CONTROL NUMBER
AVERAGE VALUES IN DOLLARS (FIRMS IMPORTING 1000 UNITS OR MORE)

		CONTROL CATEGORY															
Year	No. of Firms	32 Winter Outerwear	37 Pants, Slacks	38 Unstructured Suits	39 Blouses	40 Pyjamas and Sleepwear	41 Raincoats	42 Dresses, Skirts, Coordinates, Ladies Suits	43 Foundation Garments	44 Swimsuits	45 Underwear	46 Outer Jackets	47 Structured Suits, Sportcoats Blazers	48 Leather Jackets	49 Shirts	50 Sweaters	Total Average for Category of Importer
									MANUFACTURERS								
1978	178	12.16	6.06	9.85	2.61	3.04	9.16	6.56	1.72	2.25	0.44	9.49	15.86	41.32	2.87	4.53	3.60
1979	200	15.00	5.98	17.05	3.45	3.29	7.24	7.45	2.01	3.05	0.48	12.58	19.72	37.73	4.00	5.39	4.48
1980	222	17.53	6.52	now	3.67	4.38	11.39	8.95	2.10	4.21	0.57	12.99	23.08	now	4.32	6.01	5.30
1981	234	14.93	5.94	included	4.21	4.14	9.69	8.81	1.90	3.66	0.71	12.60	24.35	included	4.65	6.50	5.46
1982	246	16.23	6.08	in 42	4.41	4.10	15.68	10.87	1.70	3.38	0.64	12.12	29.40	in 46	4.38	6.53	5.77
									RETAILERS								
1978	274	10.67	3.54	12.49	2.48	3.75	5.97	9.17	2.61	2.38	1.03	11.79	29.39	109.76	2.96	5.26	4.37
1979	296	13.87	3.99	15.01	3.16	4.19	11.56	8.53	2.72	3.10	1.11	15.82	28.10	108.68	3.67	5.54	4.98
1980	354	14.32	5.35	now	3.97	4.52	14.18	12.78	3.45	2.81	1.13	15.58	36.16	now	4.24	6.58	6.07
1981	377	17.00	5.43	included	3.97	4.72	6.87	11.78	3.41	3.29	1.18	13.64	27.88	included	4.61	6.89	5.94
1982	394	18.01	5.27	in 42	4.12	4.68	6.71	11.40	3.78	2.71	1.32	16.08	32.11	in 46	4.89	7.15	6.34
									IMPORTERS WHOLESALERS								
1978	310	11.03	2.95	12.11	1.88	2.38	3.43	6.03	2.29	2.03	0.69	6.89	26.46	72.91	2.32	3.30	2.86
1979	341	14.10	3.69	13.39	2.27	2.55	3.59	5.71	2.26	2.06	0.68	8.65	30.76	60.32	2.79	3.66	3.43
1980	349	13.36	3.95	now	2.47	2.93	3.73	6.16	2.33	2.14	0.67	8.56	34.53	now	3.50	4.65	3.73
1981	369	12.87	4.58	included	2.70	3.12	2.99	6.19	3.84	2.02	0.64	8.97	39.26	included	3.61	5.36	3.95
1982	421	13.93	4.82	in 42	2.86	2.96	3.61	6.09	5.10	1.85	0.65	9.39	37.02	in 46	3.70	5.53	4.15
									OTHER								
1978	566	15.35	4.31	9.98	2.10	4.99	2.13	7.40	3.39	3.69	0.81	7.52	28.47	97.43	3.35	2.89	3.51
1979	650	19.80	4.33	12.13	2.59	5.57	3.62	7.93	3.56	3.26	1.03	10.00	29.31	66.93	3.77	3.59	4.21
1980	658	20.16	5.07	now	3.48	5.64	4.53	10.04	2.88	2.78	0.82	9.91	32.72	now	4.43	5.16	5.17
1981	709	16.45	5.70	included	3.81	1.59	4.89	9.47	3.75	3.90	1.19	9.72	40.53	included	4.79	5.90	5.55
1982	645	17.88	5.40	in 42	3.91	4.59	5.83	10.06	4.60	3.90	0.79	10.49	31.94	in 46	4.62	5.55	5.72

1980, 1981 Statistics Canada revisions.

APPENDIX I-4

SUMMARY
IMPORTS BY CONTROL NUMBER BY IMPORTERS IMPORTING 1000 UNITS OR MORE

Year	No. of Firms	CONTROL CATEGORY 32 Winter Outerwear	37 Pants, Slacks	38 Unstructured Suits	39 Blouses	40 Pyjamas and Sleepwear	41 Raincoats	42 Dresses, Skirts, Coordinates, Ladies Suits	43 Foundation Garments	44 Swimsuits	45 Underwear	46 Outer Jackets	47 Structured Suits, Sportcoats Blazers	48 Leather Jackets	49 Shirts	50 Sweaters	Total for Year1	Per cent Change Year to Year
									TOTAL UNITS									
1978	1,328	1,442,353	21,841,622	352,756	52,396,623	4,318,252	1,469,378	10,629,366	1,673,388	2,381,950	12,062,467	3,639,185	609,337	31,631	13,790,018	22,573,915	149,412,241	n/a
1979	1,487	2,275,546	22,242,913	449,617	50,626,162	5,915,240	1,617,458	13,321,468	2,309,856	2,715,344	13,534,388	4,905,171	776,853	41,828	15,520,735	19,267,762	155,520,341	+ 4.0
1980	1,583	1,400,034	19,936,227	now	37,015,863	3,782,604	1,640,102	10,885,119	1,825,956	2,682,761	12,475,271	5,323,064	580,100	now	13,938,327	18,314,308	129,799,736	− 16.5
1981	1,689	1,392,129	23,143,287	included	45,809,211	4,876,900	1,356,335	14,007,001	1,964,808	2,847,983	13,810,846	7,354,577	381,945	included	14,944,600	21,867,178	153,756,800	+ 18.5
1982	1,706	1,544,807	22,130,103	in 42	43,726,003	4,683,783	1,135,540	13,792,766	1,433,136	2,979,263	13,649,877	9,235,554	603,295	in 46	17,372,906	21,098,116	153,385,149	− 0.2
									TOTAL VALUE ($'000)									
1978	1,328	16,714	80,981	4,040	107,967	12,140	5,286	72,872	3,328	5,318	8,214	31,438	16,182	3,051	35,280	81,470	484,304	n/a
1979	1,487	33,046	94,219	6,256	130,510	17,949	6,976	90,901	5,167	6,720	9,341	51,471	21,525	3,252	50,248	80,930	608,527	+ 25.6
1980	1,583	20,301	96,570	now	109,945	13,616	9,309	90,829	4,357	7,335	8,876	56,803	19,280	now	54,320	97,634	589,175	− 3.2
1981	1,689	19,875	118,334	included	148,833	17,101	6,294	115,549	4,662	7,042	10,632	78,740	12,994	included	62,998	130,622	733,675	+ 24.5
1982	1,706	24,020	114,160	in 42	150,253	17,051	6,487	114,847	3,457	6,565	10,091	103,933	19,331	in 46	72,997	128,384	771,577	+ 5.2

1 Totals may not add due to rounding.
1980, 1981 Statistics Canada revisions.

Appendices
Part 2
Age of Equipment by Sector

Appendix II-1

AGE OF EQUIPMENT
WORSTED SPUN ACRYLIC YARN
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Cards	*Number*	1	—	6	5	2	14
	Per cent	(7)	—	(43)	(36)	(14)	(100)
Ring spinning	*Number*	—	—	47	40	23	110
	Per cent	—	—	(43)	(36)	(21)	(100)
Repco spinning	*Number*	—	—	—	25	67	92
	Per cent	—	—	—	(27)	(73)	(100)
Winders	*Number*	—	—	16	8	24	48
	Per cent	—	—	(33)	(17)	(50)	(100)
Twisters	*Number*	—	—	24	4	7	35
	Per cent	—	—	(69)	(11)	(20)	(100)
Dyeing and printing	*Number*	3	3	24	7	13	50
	Per cent	(6)	(6)	(48)	(14)	(26)	(100)
Other	*Number*	—	—	16	6	53	75
	Per cent	—	—	(21)	(8)	(71)	(100)
Total, all types	***Number***	**4**	**3**	**133**	**95**	**189**	**424**
	Per cent	**(1)**	**(1)**	**(31)**	**(22)**	**(45)**	**(100)**

Appendix II-2

AGE OF EQUIPMENT
COTTON AND POLYESTER-COTTON SPUN YARN
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Cards	*Number*	—	12	122	28	45	207
	Per cent	—	(6)	(59)	(13)	(22)	(100)
Ring spinning	*Number*	—	109	247	40	89	485
	Per cent	—	(23)	(51)	(8)	(18)	(100)
Open-end spinning	*Number*	—	—	—	1	1	2
	Per cent	—	—	—	(50)	(50)	(100)
Winders	*Number*	—	—	2	3	39	44
	Per cent	—	—	(4)	(7)	(89)	(100)
Twisters	*Number*	4	5	15	—	—	24
	Per cent	(17)	(21)	(62)	—	—	(100)
Other	*Number*	—	7	22	—	35	64
	Per cent	—	(11)	(34)	—	(55)	(100)
Total, all types	***Number***	**4**	**133**	**408**	**72**	**209**	**826**
	Per cent	**(1)**	**(16)**	**(49)**	**(9)**	**(25)**	**(100)**

Appendix II-3

AGE OF EQUIPMENT
COTTON SPUN ACRYLIC, RAYON, NYLON, POLYESTER AND MIXED FIBRE YARNS

Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Cards	*Number*	—	12	31	58	38	139
	Per cent	—	(9)	(22)	(42)	(27)	(100)
Ring spinning	*Number*	38	18	111	67	17	251
	Per cent	(15)	(7)	(44)	(27)	(7)	(100)
Open-end spinning	*Number*	—	—	—	5	15	20
	Per cent	—	—	—	(25)	(75)	(100)
Winders	*Number*	—	—	52	6	6	64
	Per cent	—	—	(82)	(9)	(9)	(100)
Twisters	*Number*	14	22	53	15	16	120
	Per cent	(12)	(18)	(44)	(13)	(13)	(100)
Texturing	*Number*	—	—	26	34	11	71
	Per cent	—	—	(37)	(48)	(15)	(100)
Other	*Number*	4	—	22	9	47	82
	Per cent	(5)	—	(27)	(11)	(57)	(100)
Total, all types	***Number***	**56**	**52**	**295**	**194**	**150**	**747**
	Per cent	**(8)**	**(7)**	**(39)**	**(26)**	**(20)**	**(100)**

Appendix II-4

AGE OF EQUIPMENT
MAN-MADE FABRICS
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Cards	*Number*	—	—	—	6	—	6
	Per cent	—	—	—	(100)	—	(100)
Open-end spinning	*Number*	—	—	—	4	—	4
	Per cent	—	—	—	(100)	—	(100)
Winders	*Number*	1	—	—	3	1	5
	Per cent	(20)	—	—	(60)	(20)	(100)
Twisters	*Number*	—	12	—	4	14	30
	Per cent	—	(46)	—	(15)	(39)	(100)
Shuttle looms	*Number*	1,169	392	1,276	9	260	3,106
	Per cent	(38)	(13)	(41)	—	(8)	(100)
Shuttleless looms	*Number*	—	—	145	634	404	1,183
	Per cent	—	—	(12)	(54)	(34)	(100)
Dyeing and printing	*Number*	19	56	78	51	29	233
	Per cent	(8)	(24)	(34)	(22)	(12)	(100)
Other	*Number*	1	4	4	17	58	84
	Per cent	(2)	(7)	(7)	(31)	(53)	(100)
Total, all types	***Number***	**1,190**	**464**	**1,503**	**728**	**766**	**4,651**
	Per cent	**(26)**	**(10)**	**(32)**	**(16)**	**(16)**	**(100)**

Appendix II-5

AGE OF EQUIPMENT
COTTON AND POLYESTER-COTTON FABRICS, CORDUROYS AND DENIMS

Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Cards	*Number*	—	163	249	25	56	493
	Per cent	—	(33)	(51)	(5)	(11)	(100)
Ring spinning	*Number*	13	235	511	11	—	770
	Per cent	(2)	(31)	(66)	(1)	—	(100)
Open-end spinning	*Number*	—	—	—	4	20	24
	Per cent	—	—	—	(17)	(83)	(100)
Twisters	*Number*	3	—	7	—	—	10
	Per cent	(30)	—	(70)	—	—	(100)
Shuttle looms	*Number*	—	305	3,094	770	50	4,219
	Per cent	—	(7)	(74)	(18)	(1)	(100)
Shuttleless looms	*Number*	—	—	—	—	166	166
	Per cent	—	—	—	—	(100)	(100)
Dyeing and printing	*Number*	—	1	—	1	2	4
	Per cent	—	(25)	—	(25)	(50)	(100)
Other	*Number*	—	—	2	—	26	28
	Per cent	—	—	(7)	—	(93)	(100)
Total, all types	***Number***	**16**	**704**	**3,863**	**811**	**320**	**5,714**
	Per cent	**—**	**(12)**	**(68)**	**(14)**	**(6)**	**(100)**

Appendix II-6

AGE OF EQUIPMENT
WOOLLEN AND WORSTED FABRICS
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Cards	*Number*	9	26	—	—	—	35
	Per cent	(26)	(74)	—	—	—	(100)
Ring spinning	*Number*	—	2	93	24	1	120
	Per cent	—	(2)	(77)	(20)	(1)	(100)
Winders	*Number*	—	1	12	19	6	38
	Per cent	—	(3)	(31)	(50)	(16)	(100)
Twisters	*Number*	—	—	41	3	5	49
	Per cent	—	—	(84)	(6)	(10)	(100)
Shuttle looms	*Number*	68	11	—	4	12	95
	Per cent	(71)	(12)	—	(4)	(13)	(100)
Shuttleless looms	Number	—	—	70	152	31	253
	Per cent	—	—	(28)	(60)	(12)	(100)
Dyeing and printing	*Number*	1	31	21	9	13	75
	Per cent	(2)	(41)	(28)	(12)	(17)	(100)
Other	*Number*	3	8	89	42	16	158
	Per cent	(2)	(5)	(56)	(27)	(10)	(100)
Total, all types	***Number***	**81**	**79**	**326**	**253**	**84**	**823**
	Per cent	**(10)**	**(9)**	**(40)**	**(31)**	**(10)**	**(100)**

Appendix II-7

AGE OF EQUIPMENT
COATED FABRICS
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Calendars	*Number*	3	5	1	1	—	10
	Per cent	(30)	(50)	(10)	(10)	—	(100)
Embossing	*Number*	6	3	1	—	2	12
	Per cent	(50)	(25)	8	—	(17)	(100)
Coating	*Number*	12	2	4	4	4	26
	Per cent	(47)	(8)	(15)	(15)	(15)	(100)
Curing	*Number*	4	1	—	—	—	5
	Per cent	(80)	(20)	—	—	—	(100)
Dyeing	*Number*	2	3	—	—	—	5
	Per cent	(40)	(60)	—	—	—	(100)
Other	*Number*	7	3	12	2	21	45
	Per cent	(15)	7	(27)	(4)	(47)	(100)
Total, all types	***Number***	**34**	**17**	**18**	**7**	**27**	**103**
	Per cent	**(33)**	**(16)**	**(17)**	**(7)**	**(27)**	**(100)**

Appendix II-8

AGE OF EQUIPMENT
DYEING AND PRINTING
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Winders	*Number*	3	10	49	17	—	79
	Per cent	(4)	(13)	(62)	(21)	—	(100)
Dyeing and printing	*Number*	—	19	73	52	21	165
	Per cent	—	(12)	(44)	(31)	(13)	(100)
Other	*Number*	4	61	83	52	56	256
	Per cent	(2)	(24)	(32)	(20)	(22)	(100)
Total, all types	***Number***	**7**	**90**	**205**	**121**	**77**	**500**
	Per cent	**(2)**	**(18)**	**(41)**	**(24)**	**(15)**	**(100)**

Appendix II-9

AGE OF EQUIPMENT
SHEETS AND PILLOWCASES
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Cards	*Number*	6	—	—	—	89	95
	Per cent	(6)	—	—	—	(94)	(100)
Ring spinning	*Number*	144	103	89	23	3	362
	Per cent	(40)	(28)	(25)	(6)	(1)	(100)
Open-end spinning	*Number*	—	—	—	16	—	16
	Per cent	—	—	—	(100)	—	(100)
Winders	*Number*	8	—	7	4	2	21
	Per cent	(38)	—	(33)	(19)	(10)	(100)
Shuttle looms	*Number*	102	473	910	172	—	1,657
	Per cent	(6)	(29)	(55)	(10)	—	(100)
Shuttleless looms	*Number*	—	—	—	218	76	294
	Per cent	—	—	—	(84)	(16)	(100)
Dyeing and printing	*Number*	—	4	4	1	—	9
	Per cent	—	(50)	(40)	(10)	—	(100)
Other	*Number*	—	—	—	—	2	2
	Per cent	—	—	—	—	(100)	(100)
Total, all types	***Number***	**260**	**580**	**1,010**	**434**	**172**	**2,456**
	Per cent	**(10)**	**(24)**	**(41)**	**(18)**	**(7)**	**(100)**

Appendix II-10

AGE OF EQUIPMENT
TOWELS
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Winders	*Number*	—	—	—	—	1	1
	Per cent	—	—	—	—	(100)	(100)
Shuttle looms	*Number*	137	64	42	47	83	373
	Per cent	(37)	(17)	(11)	(13)	(22)	(100)
Shuttleless looms	*Number*	—	—	—	—	64	64
	Per cent	—	—	—	—	(100)	(100)
Dyeing and printing	*Number*	—	7	5	4	1	17
	Per cent	—	(41)	(29)	(24)	(6)	(100)
Other	*Number*	1	2	2	—	8	13
	Per cent	(8)	(15)	(15)	—	(62)	(100)
Total, all types	***Number***	**138**	**73**	**49**	**51**	**157**	**468**
	Per cent	**(29)**	**(16)**	**(10)**	**(11)**	**(34)**	**(100)**

Appendix II-11

AGE OF EQUIPMENT
MISCELLANEOUS PRODUCTS
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Cards	*Number*	23	7	15	12	46	103
	Per cent	(22)	(7)	(15)	(12)	(44)	(100)
Ring spinning	*Number*	—	102	14	—	—	116
	Per cent	—	(88)	(12)	—	—	(100)
Open-end spinning	*Number*	—	—	—	—	2	2
	Per cent	—	—	—	—	(100)	(100)
Winders	*Number*	—	—	115	64	36	215
	Per cent	—	—	(53)	(30)	(17)	(100)
Twisters	*Number*	—	—	40	17	6	63
	Per cent	—	—	(63)	(27)	(10)	(100)
Shuttle looms	*Number*	—	145	—	—	—	145
	Per cent	—	(100)	—	—	—	(100)
Shuttleless looms	*Number*	—	—	1	89	1	91
	Per cent	—	—	(1)	(98)	(1)	(100)
Dyeing and printing	*Number*	3	—	21	—	3	27
	Per cent	(11)	—	(78)	—	(11)	(100)
Other	*Number*	4	10	25	32	21	92
	Per cent	4	(11)	(27)	(35)	(23)	(100)
Total, all types	***Number***	**30**	**264**	**231**	**214**	**115**	**854**
	Per cent	**(4)**	**(31)**	**(27)**	**(25)**	**(13)**	**(100)**

Appendix II-12

AGE OF EQUIPMENT
CORDAGE, ROPE AND TWINE
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Extrusion units	*Number*	—	—	3	11	4	18
	Per cent	—	—	(17)	(61)	(22)	(100)
Twisters	*Number*	7	32	35	19	71	164
	Per cent	(4)	(20)	(21)	(12)	(43)	(100)
Braiders	*Number*	193	—	—	62	65	320
	Per cent	(61)	—	—	(19)	(20)	(100)
Winders	*Number*	34	13	13	38	5	103
	Per cent	(33)	(13)	(13)	(37)	(4)	(100)
Rope systems	*Number*	—	15	17	5	24	61
	Per cent	—	(25)	(28)	(8)	(39)	(100)
Other	*Number*	30	32	8	9	16	95
	Per cent	(32)	(34)	(8)	(9)	(17)	(100)
Total, all types	***Number***	**264**	**92**	**76**	**144**	**185**	**761**
	Per cent	**(35)**	**(12)**	**(10)**	**(19)**	**(24)**	**(100)**

Appendix II-13

AGE OF EQUIPMENT
HOSIERY
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Knitting	*Number*	388	971	952	436	635	3,382
	Per cent	(11)	(29)	(28)	(13)	(19)	(100)
Seaming	*Number*	—	6	66	29	31	132
	Per cent	—	(5)	(50)	(22)	(23)	(100)
Turning	*Number*	—	1	—	9	25	35
	Per cent	—	(3)	—	(26)	(71)	(100)
Boarding	*Number*	—	6	23	19	24	72
	Per cent	—	(8)	(32)	(27)	(33)	(100)
Other	*Number*	22	33	52	18	55	180
	Per cent	(12)	(18)	(29)	(10)	(31)	(100)
Total, all types	***Number***	**410**	**1,017**	**1,093**	**511**	**770**	**3,801**
	Per cent	**(11)**	**(27)**	**(29)**	**(13)**	**(20)**	**(100)**

Appendix II-14

AGE OF EQUIPMENT
WORK GLOVES
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Clickers, beam presses	*Number*	—	6	41	18	21	86
	Per cent	—	(7)	(48)	(21)	(24)	(100)
Sewing	*Number*	—	57	112	533	178	880
	Per cent	—	(6)	(13)	(61)	(20)	(100)
Turners, formers, blockers	*Number*	—	2	23	19	29	73
	Per cent	—	(3)	(31)	(26)	(40)	(100)
Knitting	*Number*	—	29	10	27	6	72
	Per cent	—	(40)	(14)	(38)	(8)	(100)
Other	*Number*	—	3	5	6	6	20
	Per cent	—	(15)	(25)	(30)	(30)	(100)
Total, all types	***Number***	**—**	**97**	**191**	**603**	**240**	**1,131**
	Per cent	**—**	**(9)**	**(17)**	**(53)**	**(21)**	**(100)**

Appendix II-15

AGE OF EQUIPMENT
HANDBAGS
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Clickers	*Number*	—	—	22	25	26	73
	Per cent	—	—	(30)	(34)	(36)	(100)
Sewing	*Number*	—	23	135	172	169	499
	Per cent	—	(5)	(27)	(34)	(34)	(100)
Framing	*Number*	—	—	15	9	16	40
	Per cent	—	—	(38)	(22)	(40)	(100)
Fusing, cementing	*Number*	—	5	29	19	46	99
	Per cent	—	(5)	(29)	(19)	(47)	(100)
Other	*Number*	—	2	11	11	31	55
	Per cent	—	(4)	(20)	(20)	(56)	(100)
Total, all types	***Number***	—	**30**	**212**	**236**	**288**	**766**
	Per cent	—	**(4)**	**(28)**	**(31)**	**(37)**	**(100)**

Appendix II-16

AGE OF EQUIPMENT
KNITTED FABRICS
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Winders	*Number*	1	3	8	—	4	16
	Per cent	(6)	(19)	(50)	—	(25)	(100)
Warpers	*Number*	1	6	3	25	4	39
	Per cent	(3)	(15)	(8)	(64)	(10)	(100)
Single knit	*Number*	116	54	131	46	111	458
	Per cent	(25)	(12)	(29)	(10)	(24)	(100)
Double Knit	*Number*	—	8	72	247	70	397
	Per cent	—	(2)	(18)	(62)	(18)	(100)
Interlock	*Number*	—	—	10	—	21	31
	Per cent	—	—	(32)	—	(68)	(100)
Sliver knit	*Number*	—	—	53	27	29	109
	Per cent	—	—	(49)	(25)	(26)	(100)
Total, circular knitting	*Number*	116	62	266	320	231	995
	Per cent	(12)	(6)	(27)	(32)	(23)	(100)
Tricot	*Number*	—	8	125	68	120	321
	Per cent	—	(3)	(39)	(21)	(37)	(100)
Raschel	*Number*	—	19	40	35	35	129
	Per cent	—	(15)	(31)	(27)	(27)	(100)
Simplex	*Number*	—	5	2	4	—	11
	Per cent	—	(46)	(18)	(36)	—	(100)
Other warp	*Number*	2	—	—	—	2	4
	Per cent	(50)	—	—	—	(50)	(100)
Total, warp knitting	*Number*	2	32	167	107	157	465
	Per cent	(neg)	(7)	(36)	(23)	(34)	(100)
Total, all knitting	*Number*	118	94	433	427	388	1,460
	Per cent	(8)	(6)	(30)	(29)	(27)	(100)
Dyeing and printing	*Number*	6	17	63	30	19	135
	Per cent	(4)	(13)	(47)	(22)	(14)	(100)
Drying and curing; tenter frames	*Number*	1	2	26	13	23	65
	Per cent	(2)	(3)	(40)	(20)	(35)	(100)
Other finishing	*Number*	—	2	39	38	25	104
	Per cent	—	(2)	(38)	(36)	(24)	(100)
Other	*Number*	21	1	90	65	138	315
	Per cent	(7)	—	(28)	(21)	(44)	(100)
Total, all types	***Number***	**148**	**125**	**662**	**598**	**601**	**2,134**
	Per cent	**(7)**	**(6)**	**(31)**	**(28)**	**(28)**	**(100)**

Appendix II-17

AGE OF EQUIPMENT
OUTERWEAR
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Pattern marking and grading	*Number*	—	—	1	—	32	33
	Per cent	—	—	(3)	—	(97)	(100)
Cutting room	*Number*	—	4	35	35	115	189
	Per cent	—	(2)	(19)	(19)	(60)	(100)
Sewing	*Number*	7	115	369	994	1,159	2,644
	Per cent	(neg)	(4)	(14)	(38)	(44)	(100)
— plain	*Number*	6	108	283	669	876	1,942
	Per cent	(neg)	(6)	(15)	(34)	(45)	(100)
— specialized	*Number*	1	7	86	325	283	702
	Per cent	(neg)	(1)	(12)	(46)	(41)	(100)
Fusing	*Number*	—	—	—	1	12	13
	Per cent	—	—	—	(8)	(92)	(100)
Material handling	*Number*	—	—	—	3	17	20
	Per cent	—	—	—	(15)	(85)	(100)
Steam pressing	*Number*	—	—	16	27	30	73
	Per cent	—	—	(22)	(37)	(41)	(100)
— plain	*Number*	—	—	14	23	27	64
	Per cent	—	—	(22)	(36)	(42)	(100)
— specialized	*Number*	—	—	2	4	3	9
	Per cent	—	—	(22)	(45)	(33)	(100)
Total, all types	***Number***	**7**	**119**	**421**	**1,060**	**1,365**	**2,972**
	Per cent	**(neg)**	**(4)**	**(14)**	**(36)**	**(46)**	**(100)**

Appendix II-18

AGE OF EQUIPMENT
PANTS, SLACKS, SHORTS, OVERALLS
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Pattern marking and grading	*Number*	—	1	5	6	34	46
	Per cent	—	(2)	(11)	(13)	(74)	(100)
Cutting room	Number	4	5	75	124	249	457
	Per cent	(neg)	(1)	(16)	(28)	(55)	(100)
Sewing	*Number*	18	388	1,848	3,331	5,256	10,851
	Per cent	(neg)	(4)	(17)	(31)	(48)	(100)
— plain	*Number*	18	350	1,531	2,949	3,583	8,431
	Per cent	(neg)	(4)	(18)	(35)	(43)	(100)
— specialized	*Number*	—	38	317	382	1,683	2,420
	Per cent	—	(1)	(13)	(16)	(70)	(100)
Fusing	*Number*	—	—	—	8	31	39
	Per cent	—	—	—	(21)	(79)	(100)
Material handling	*Number*	—	—	—	7	160	167
	Per cent	—	—	—	(4)	(96)	(100)
Steam pressing	*Number*	—	8	116	248	391	763
	Per cent	—	(1)	(15)	(33)	(51)	(100)
— plain	*Number*	—	—	93	216	231	540
	Per cent	—	—	(17)	(40)	(43)	(100)
— specialized	*Number*	—	8	23	32	160	223
	Per cent	—	(4)	(10)	(14)	(72)	(100)
Knitting	*Number*	—	—	—	—	71	71
	Per cent	—	—	—	—	(100)	(100)
— circular	*Number*	—	—	—	—	51	51
	Per cent	—	—	—	—	(100)	(100)
— flat	*Number*	—	—	—	—	20	20
	Per cent	—	—	—	—	(100)	(100)
Total, all types	***Number***	**22**	**402**	**2,044**	**3,724**	**6,202**	**12,394**
	Per cent	**(neg)**	**(3)**	**(17)**	**(30)**	**(50)**	**(100)**

Appendix II-19

AGE OF EQUIPMENT
BLOUSES, T-SHIRTS, SWEATSHIRTS
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Pattern marking and grading	*Number*	—	—	4	—	13	17
	Per cent	—	—	(24)	—	(76)	(100)
Cutting room	*Number*	6	13	28	56	87	190
	Per cent	(3)	(7)	(15)	(29)	(46)	(100)
Sewing	*Number*	13	36	627	1,068	2,370	4,114
	Per cent	(neg)	(1)	(15)	(26)	(58)	(100)
— plain	*Number*	13	36	482	639	1,061	2,231
	Per cent	(neg)	(1)	(22)	(29)	(48)	(100)
— specialized	*Number*	—	—	145	429	1,309	1,883
	Per cent	—	—	(7)	(23)	(70)	(100)
Fusing	*Number*	—	—	—	2	19	21
	Per cent	—	—	—	(10)	(90)	(100)
Material handling	*Number*	—	—	4	5	147	156
	Per cent	—	—	(3)	(3)	(94)	(100)
Steam pressing	*Number*	—	—	9	62	122	193
	Per cent	—	—	(5)	(32)	(63)	(100)
— plain	*Number*	—	—	4	29	55	88
	Per cent	—	—	(5)	(33)	(62)	(100)
— specialized	*Number*	—	—	5	33	67	105
	Per cent	—	—	(5)	(31)	(64)	(100)
Knitting	*Number*	301	28	43	172	95	639
	Per cent	(47)	(4)	(7)	(27)	(15)	(100)
— circular	*Number*	301	28	20	102	76	527
	Per cent	(57)	(5)	(4)	(19)	(15)	(100)
— flat	*Number*	—	—	23	70	19	112
	Per cent	—	—	(21)	(62)	(17)	(100)
Total, all types	***Number***	**320**	**77**	**715**	**1,365**	**2,853**	**5,330**
	Per cent	**(6)**	**(1)**	**(13)**	**(26)**	**(54)**	**(100)**

Appendix II-20

AGE OF EQUIPMENT
PYJAMAS AND SLEEPWEAR
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Pattern marking and grading	*Number*	—	—	—	5	6	11
	Per cent	—	—	—	(45)	(55)	(100)
Cutting room	*Number*	—	2	19	38	46	105
	Per cent	—	(2)	(18)	(36)	(44)	(100)
Sewing	*Number*	15	56	261	998	1,033	2,363
	Per cent	(1)	(2)	(11)	(42)	(44)	(100)
— plain	*Number*	15	56	170	476	559	1,276
	Per cent	(1)	(4)	(13)	(38)	(44)	(100)
— specialized	*Number*	—	—	91	522	474	1,087
	Per cent	—	—	(8)	(48)	(44)	(100)
Fusing	*Number*	—	—	—	1	6	7
	Per cent	—	—	—	(14)	(86)	(100)
Material handling	*Number*	—	—	—	1	89	90
	Per cent	—	—	—	(1)	(99)	(100)
Steam pressing	*Number*	1	—	6	22	18	47
	Per cent	(2)	—	(13)	(47)	(38)	(100)
— plain	*Number*	1	—	6	12	11	30
	Per cent	(3)	—	(20)	(40)	(37)	(100)
— specialized	*Number*	—	—	—	10	7	17
	Per cent	—	—	—	(59)	(41)	(100)
Total, all types	***Number***	**16**	**58**	**286**	**1,065**	**1,198**	**2,623**
	Per cent	**(neg)**	**(2)**	**(11)**	**(41)**	**(46)**	**(100)**

Appendix II-21

AGE OF EQUIPMENT
RAINCOATS
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Pattern marking and grading	*Number*	—	—	—	—	2	2
	Per cent	—	—	—	—	(100)	(100)
Cutting room	*Number*	—	—	3	7	4	14
	Per cent	—	—	(21)	(50)	(29)	(100)
Sewing	*Number*	—	17	104	52	49	222
	Per cent	—	(8)	(47)	(23)	(22)	(100)
— plain	*Number*	—	9	89	46	31	175
	Per cent	—	(5)	(51)	(26)	(18)	(100)
— specialized	*Number*	—	8	15	6	18	47
	Per cent	—	(17)	(32)	(13)	(38)	(100)
Fusing	*Number*	—	—	—	—	2	2
	Per cent	—	—	—	—	(100)	(100)
Material handling	*Number*	—	—	—	—	9	9
	Per cent	—	—	—	—	(100)	(100)
Steam pressing	*Number*	—	—	19	4	18	41
	Per cent	—	—	(46)	(10)	(44)	(100)
— plain	*Number*	—	—	—	1	10	11
	Per cent	—	—	—	(9)	(91)	(100)
— specialized	*Number*	—	—	19	3	8	30
	Per cent	—	—	(63)	(10)	(27)	(100)
Total, all types	***Number***	—	**17**	**126**	**63**	**84**	**290**
	Per cent	—	**(6)**	**(43)**	**(22)**	**(29)**	**(100)**

Appendix II-22

AGE OF EQUIPMENT
WOMEN'S SPORTSWEAR, DRESSES, SKIRTS AND SUITS
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Pattern marking and grading	*Number*	—	1	1	17	20	39
	Per cent	—	(3)	(3)	(43)	(51)	(100)
Cutting room	*Number*	—	2	45	117	96	260
	Per cent	—	(1)	(17)	(45)	(37)	(100)
Sewing	*Number*	50	135	1,125	1,603	1,836	4,749
	Per cent	(1)	(3)	(24)	(34)	(38)	(100)
— plain	*Number*	50	110	911	1,166	1,191	3,428
	Per cent	(1)	(3)	(27)	(34)	(35)	(100)
— specialized	*Number*	—	25	214	437	645	1,321
	Per cent	—	(2)	(16)	(33)	(49)	(100)
Fusing	*Number*	—	—	—	5	17	22
	Per cent	—	—	—	(23)	(77)	(100)
Material handling	*Number*	—	3	3	5	14	25
	Per cent	—	(12)	(12)	(20)	(56)	(100)
Steam pressing	*Number*	—	5	65	90	155	315
	Per cent	—	(1)	(21)	(29)	(49)	(100)
— plain	*Number*	—	1	58	46	67	172
	Per cent	—	(neg)	(34)	(27)	(39)	(100)
— specialized	*Number*	—	4	7	44	88	143
	Per cent	—	(3)	(5)	(31)	(61)	(100)
Knitting	*Number*	—	4	9	55	43	111
	Per cent	—	(3)	(8)	(50)	(39)	(100)
— circular	*Number*	—	—	7	29	40	76
	Per cent	—	—	(9)	(38)	(53)	(100)
— flat	*Number*	—	4	2	26	3	35
	Per cent	—	(11)	(6)	(74)	(9)	(100)
Total, all types	***Number***	**50**	**150**	**1,248**	**1,892**	**2,181**	**5,521**
	Per cent	**(1)**	**(3)**	**(23)**	**(34)**	**(39)**	**(100)**

Appendix II-23

AGE OF EQUIPMENT
FOUNDATION GARMENTS
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Pattern marking and grading	*Number*	—	—	—	—	1	1
	Per cent	—	—	—	—	(100)	(100)
Cutting room	*Number*	—	1	1	5	13	20
	Per cent	—	(5)	(5)	(25)	(65)	(100)
Sewing	*Number*	155	195	1,130	380	627	2,487
	Per cent	(6)	(8)	(46)	(15)	(25)	(100)
— plain	*Number*	149	172	1,030	251	274	1,876
	Per cent	(8)	(9)	(55)	(13)	(15)	(100)
— specialized	*Number*	6	23	100	129	353	611
	Per cent	(1)	(4)	(16)	(21)	(58)	(100)
Fusing	*Number*	—	—	—	2	20	22
	Per cent	—	—	—	(9)	(91)	(100)
Material handling	*Number*	—	—	12	5	2	19
	Per cent	—	—	(63)	(26)	(11)	(100)
Steam pressing	*Number*	—	—	1	—	3	4
	Per cent	—	—	(25)	—	(75)	(100)
— plain	*Number*	—	—	—	—	3	3
	Per cent	—	—	—	—	(100)	(100)
— specialized	*Number*	—	—	1	—	—	1
	Per cent	—	—	(100)	—	—	(100)
Total, all types	***Number***	**155**	**196**	**1,144**	**392**	**666**	**2,553**
	Per cent	**(6)**	**(8)**	**(45)**	**(15)**	**(26)**	**(100)**

Appendix II-24

AGE OF EQUIPMENT
SWIMWEAR
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Cutting Room	*Number*	—	7	1	6	7	21
	Per cent	—	(33)	(5)	(29)	(33)	(100)
Sewing	*Number*	15	63	204	475	379	1,136
	Per cent	(1)	(6)	(18)	(42)	(33)	(100)
— plain	*Number*	—	20	71	363	244	698
	Per cent	—	(3)	(10)	(52)	(35)	(100)
— specialized	*Number*	15	43	133	112	135	438
	Per cent	(3)	(10)	(30)	(26)	(31)	(100)
Fusing	*Number*	—	—	—	1	6	7
	Per cent	—	—	—	(14)	(86)	(100)
Material handling	*Number*	—	—	1	3	2	6
	Per cent	—	—	(17)	(50)	(33)	(100)
Steam pressing	*Number*	—	—	18	3	1	22
	Per cent	—	—	(82)	(14)	(4)	(100)
— plain	*Number*	—	—	2	3	1	6
	Per cent	—	—	(33)	(50)	(17)	(100)
— specialized	*Number*	—	—	16	—	—	16
	Per cent	—	—	(100)	—	—	(100)
Knitting	*Number*	—	19	28	4	2	53
	Per cent	—	(36)	(53)	(7)	(4)	(100)
— circular	*Number*	—	19	28	4	2	53
	Per cent	—	(36)	(53)	(7)	(4)	(100)
— flat	*Number*	—	—		—	—	—
	Per cent	—	—	—	—	—	—
Total, all types	***Number***	**15**	**89**	**252**	**492**	**397**	**1,245**
	Per cent	**(1)**	**(7)**	**(20)**	**(40)**	**(32)**	**(100)**

Appendix II-25

AGE OF EQUIPMENT
UNDERWEAR
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Pattern Marking and Grading	*Number*	—	—	3	—	4	7
	Per cent	—	—	(42)	—	(58)	(100)
Cutting room	*Number*	—	2	21	26	15	64
	Per cent	—	(3)	(33)	(41)	(23)	(100)
Sewing	*Number*	63	118	1,069	850	1,469	3,569
	Per cent	(2)	(3)	(30)	(24)	(41)	(100)
— plain	*Number*	63	114	968	610	945	2,700
	Per cent	(2)	(4)	(36)	(23)	(35)	(100)
— specialized	*Number*	—	4	101	240	524	869
	Per cent	—	(neg)	(13)	(27)	(60)	(100)
Fusing	*Number*	—	—	1	1	5	7
	Per cent	—	—	(14)	(14)	(72)	(100)
Material handling	*Number*	—	—	7	21	18	46
	Per cent	—	—	(5)	(46)	(39)	(100)
Steam pressing	*Number*	—	—	6	1	22	29
	Per cent	—	—	(21)	(3)	(76)	(100)
— plain	*Number*	—	—	6	—	16	22
	Per cent	—	—	(27)	—	(73)	(100)
— specialized	*Number*	—	—	—	1	6	7
	Per cent	—	—	—	(14)	(86)	(100)
Knitting	*Number*	69	76	117	62	105	429
	Per cent	(16)	(18)	(27)	(15)	(24)	(100)
— circular	*Number*	69	76	115	62	103	425
	Per cent	(16)	(18)	(27)	(15)	(24)	(100)
— flat	*Number*	—	—	2	—	2	4
	Per cent	—	—	(50)	—	(50)	(100)
Total, all types	***Number***	**132**	**196**	**1,224**	**961**	**1,638**	**4,151**
	Per cent	**(3)**	**(5)**	**(29)**	**(23)**	**(40)**	**(100)**

Appendix II-26

AGE OF EQUIPMENT
JACKETS, OVERCOATS, TOPCOATS, LEATHER COATS AND JACKETS
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Pattern Marking and Grading	*Number*	—	—	1	4	10	15
	Per cent	—	—	(6)	(27)	(67)	(100)
Cutting room	*Number*	—	—	8	31	25	64
	Per cent	—	—	(13)	(48)	(39)	(100)
Sewing	*Number*	—	21	583	646	608	1,858
	Per cent	—	(1)	(31)	(35)	(33)	(100)
— plain	*Number*	—	21	394	468	396	1,279
	Per cent	—	(1)	(31)	(37)	(31)	(100)
— specialized	*Number*	—	—	189	178	212	579
	Per cent	—	—	(32)	(31)	(37)	(100)
Fusing	*Number*	—	—	—	5	18	23
	Per cent	—	—	—	(22)	(78)	(100)
Material handling	*Number*	—	—	1	—	3	4
	Per cent	—	—	(25)	—	(75)	(100)
Steam pressing	*Number*	—	—	33	66	29	128
	Per cent	—	—	(26)	(51)	(23)	(100)
— plain	*Number*	—	—	8	27	16	51
	Per cent	—	—	(16)	(53)	(31)	(100)
— specialized	*Number*	—	—	25	39	13	77
	Per cent	—	—	(32)	(51)	(17)	(100)
Total, all types	***Number***	—	**21**	**626**	**752**	**693**	**2,092**
	Per cent	—	**(1)**	**(30)**	**(36)**	**(33)**	**(100)**

Appendix II-27

AGE OF EQUIPMENT
STRUCTURED SUITS AND JACKETS
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Pattern Marking and Grading	*Number*	—	—	—	5	9	14
	Per cent	—	—	—	(36)	(64)	(100)
Cutting room	*Number*	—	—	13	4	45	62
	Per cent	—	—	(21)	(6)	(73)	(100)
Sewing	*Number*	—	72	447	878	1,237	2,634
	Per cent	—	(3)	(17)	(33)	(47)	(100)
— plain	*Number*	—	72	395	742	787	1,996
	Per cent	—	(4)	(20)	(37)	(39)	(100)
— specialized	*Number*	—	—	52	136	450	638
	Per cent	—	—	(8)	(21)	(71)	(100)
Fusing	*Number*	—	—	—	4	18	22
	Per cent	—	—	—	(18)	(82)	(100)
Material handling	*Number*	—	—	3	4	7	14
	Per cent	—	—	(21)	(29)	(50)	(100)
Steam pressing	*Number*	—	—	142	240	150	532
	Per cent	—	—	(27)	(45)	(28)	(100)
— plain	*Number*	—	—	90	217	96	403
	Per cent	—	—	(22)	(54)	(24)	(100)
— specialized	*Number*	—	—	52	23	54	129
	Per cent	—	—	(40)	(18)	(42)	(100)
Total, all types	***Number***	—	**72**	**605**	**1,135**	**1,466**	**3,278**
	Per cent	—	**(2)**	**(18)**	**(35)**	**(45)**	**(100)**

Appendix II-28

AGE OF EQUIPMENT
MEN'S TAILORED COLLAR SHIRTS
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Pattern Marking and Grading	*Number*	—	—	4	—	8	12
	Per cent	—	—	(33)	—	(67)	(100)
Cutting room	*Number*	13	24	45	56	75	213
	Per cent	(6)	(11)	(21)	(26)	(36)	(100)
Sewing	*Number*	76	243	808	756	1,165	3,048
	Per cent	(2)	(8)	(27)	(25)	(38)	(100)
— plain	*Number*	70	239	748	423	656	2,136
	Per cent	(3)	(11)	(35)	(20)	(31)	(100)
— specialized	*Number*	6	4	60	333	509	912
	Per cent	(1)	(neg)	(7)	(36)	(56)	(100)
Fusing	*Number*	7	2	6	9	20	44
	Per cent	(16)	(5)	(14)	(20)	(45)	(100)
Material handling	*Number*	1	1	6	32	23	63
	Per cent	(2)	(2)	(10)	(51)	(36)	(100)
Steam pressing	*Number*	21	45	99	19	326	510
	Per cent	(4)	(9)	(19)	(4)	(64)	(100)
— plain	*Number*	21	42	65	17	16	161
	Per cent	(13)	(26)	(40)	(11)	(10)	(100)
— specialized	*Number*	—	3	34	2	310	349
	Per cent	—	(1)	(10)	(1)	(88)	(100)
Total, all types	***Number***	**118**	**315**	**968**	**872**	**1,617**	**3,890**
	Per cent	**(3)**	**(8)**	**(25)**	**(22)**	**(42)**	**(100)**

NOTE: Full fashioned collar shirts are now included with Blouses, T-shirts and Sweatshirts.

Appendix II-29

AGE OF EQUIPMENT
SWEATERS, PULLOVERS AND CARDIGANS
Number of machines

Type of equipment		Over 30 yrs.	20-30 yrs.	10-19 yrs.	5-9 yrs.	Under 5 yrs.	TOTAL
Pattern Marking and Grading	*Number*	—	—	—	—	1	1
	Per cent	—	—	—	—	(100)	(100)
Cutting room	*Number*	1	4	11	17	17	50
	Per cent	(2)	(8)	(22)	(34)	(34)	(100)
Sewing	*Number*	8	24	215	672	816	1,735
	Per cent	(neg)	(1)	(13)	(39)	(47)	(100)
— plain	*Number*	4	13	135	426	579	1,157
	Per cent	(neg)	(1)	(12)	(37)	(50)	(100)
— specialized	*Number*	4	11	80	246	237	578
	Per cent	(neg)	(2)	(14)	(43)	(41)	(100)
Fusing	*Number*	—	—	—	—	3	3
	Per cent	—	—	—	—	(100)	(100)
Material handling	*Number*	—	—	—	5	7	12
	Per cent	—	—	—	(42)	(58)	(100)
Steam pressing	*Number*	—	6	19	55	70	150
	Per cent	—	(4)	(12)	(37)	(47)	(100)
— plain	*Number*	—	6	12	43	53	114
	Per cent	—	(5)	(11)	(38)	(46)	(100)
— specialized	*Number*	—	—	7	12	17	36
	Per cent	—	—	(20)	(33)	(47)	(100)
Knitting	*Number*	25	100	365	443	221	1,154
	Per cent	(2)	(9)	(32)	(38)	(19)	(100)
— circular	*Number*	5	51	143	237	113	549
	Per cent	(1)	(9)	(26)	(43)	(21)	(100)
— flat	*Number*	20	49	222	206	108	605
	Per cent	(3)	(8)	(37)	(34)	(18)	(100)
Total, all types	***Number***	**34**	**134**	**610**	**1,192**	**1,135**	**3,105**
	Per cent	**(1)**	**(4)**	**(20)**	**(38)**	**(37)**	**(100)**