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Textile and Clothing Board | Commission du textile et du vêtement

REPORT ON TEXTILES AND CLOTHING 1988

Canada

TEXTILE AND CLOTHING BOARD
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1988

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

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December 23, 1988

The Honourable Robert R. de Cotret, P.C., M.P.
Minister of Regional Industrial Expansion
and Minister of State for Science and Technology
Ottawa, Ontario
K1A 0H5

Mr. Minister:

We have the honour of presenting the 1988 Report of the Board on the situation of the textile and clothing industries.

This Report, published annually, is an account of the performance of the textile and clothing industries in the previous year. This year's Report also includes an analysis of the utilization of the restraint levels and flexibility provisions on textile and clothing products that were contained in the bilateral agreements negotiated by Canada for the period from 1982 to 1986.

Yours sincerely,

Otto E. Thur
Chairman

William L. Hawkins
Member

Jacques St-Laurent
Member

Canada

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PART I

REVIEW OF THE SITUATION IN THE TEXTILE AND CLOTHING INDUSTRIES IN 1987

1. GENERAL ECONOMIC SITUATION

1987 was another year of strong economic growth in Canada. Canada's growth in terms of Gross Domestic Product and manufacturing production ranked second among the group of the seven most developed countries (behind Japan for growth in GDP and behind the United Kingdom for growth in manufacturing production) (Table 1).

Table 1

GROWTH IN REAL GROSS NATIONAL OR GROSS DOMESTIC PRODUCT AND IN MANUFACTURING PRODUCTION IN THE SEVEN MAJOR INDUSTRIAL COUNTRIES
Per Cent

	Gross National or Gross Domestic Product			Manufacturing Production		
Country	**1985/84**	**1986/85**	**1987/86**	**1985/84**	**1986/85**	**1987/86**
Canada (GDP)	4.3	3.3	3.9	5.5	2.3	4.8
United States (GNP)	3.0	2.9	2.9	2.6	1.7	4.2
Japan (GNP)	4.7	2.5	4.2	4.3	0.0	4.1
France (GDP)	1.7	2.0	1.9	0.0	0.0	3.5
Italy (GDP)	2.7	2.7	2.5	2.1	3.1	2.0
United Kingdom (GDP)	3.8	3.0	3.6	3.0	0.0	5.8
West Germany (GNP)	2.0	2.5	1.7	5.1	2.9	0.0

SOURCE: Appendix Tables A-1 and A-2.

This strong performance was all the more remarkable in that Canada placed either first or second, in terms of overall growth, for the third year in a row among the Group of Seven countries.

The main factors behind the overall growth of the Canadian economy were the strong expansion in consumers' expenditure (4.5 per cent) and the even stronger growth in private domestic fixed investment (11.1 per cent). Only the United Kingdom showed a higher growth in consumers' expenditure than Canada and none of the Group of Seven countries outperformed Canada in private domestic fixed investment (Appendix Table A-1).

The sustained growth in consumers' expenditures and the significant depreciation of the Canadian and the U.S. dollars in relation to many other currencies in 1986 and 1987, served as a stimulus to the continued expansion of textile and clothing production in these two countries. Both countries benefitted in 1986 and 1987 from a brisk domestic demand for textiles and clothing due to a renewed upswing of the textile cycle (Tables 2 and 3).

Table 2

INDEX OF PRIMARY TEXTILE PRODUCTION IN THE MAJOR INDUSTRIALIZED COUNTRIES, 1981-1987
(1981 = 100)

Country	1981	1982	1983	1984	1985	1986	1987
Canada	100	78	100	102	102	106	114
United States	100	90	102	105	103	110	117
Japan	100	98	99	101	100	96	95
France	100	99	97	98	96	92	89
Italy	100	98	89	96	98	101	104
United Kingdom	100	99	101	103	107	109	109
West Germany	100	95	95	97	100	102	101

SOURCE: Statistics Canada, Cat. 15-512 Occasional and 15-001; U.S. Department of Commerce, Business Statistics 1988; COMITEXTIL, Bulletin; O.E.C.D., Indicators of Industrial Activity (The 1987 data for all countries except Canada are preliminary).

Table 3

INDEX OF CLOTHING PRODUCTION IN THE MAJOR INDUSTRIALIZED COUNTRIES, 1981-1987
(1981 = 100)

Country	1981	1982	1983	1984	1985	1986	1987
Canada	100	89	89	96	97	101	104
United States	100	91	99	107	104	107	111
Japan	100	103	100	101	103	102	n.a.
France	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Italy	100	101	96	104	101	104	96
United Kingdom	100	103	107	114	122	123	122
West Germany	100	91	90	90	89	89	85

n.a.: Not available.

SOURCE: See Table 2.

A comparison of textile and clothing performance between the Group of Seven countries shows a clear contrast between Canada and the United States on the one hand and Japan, France, Italy and West Germany on the other. The low exchange value of the dollar has strengthened the international competitive capacity of the first two countries while the high exchange value of the Japanese and West European currencies has discouraged exports and encouraged imports of textiles and clothing in the four latter countries. The United Kingdom represented an exception: its textile and particularly clothing industry grew steadily despite a major international appreciation of the pound sterling. The United Kingdom has been reaping the benefits of a profound restructuring of its textile and clothing industries which have become very competitive within the European Economic Community.

2. PRODUCTION AND CAPACITY UTILIZATION IN THE CANADIAN TEXTILE AND CLOTHING INDUSTRIES

After a 3.8 per cent growth in both textile and clothing industries in 1986, Canadian textile output grew by 7.6 per cent in 1987 while the clothing industry output progressed by 2.9 per cent (Table 4). Each of these growth rates was higher than the growth rate of the non-durable manufacturing industries (2.7 per cent).

Table 4

INDEX OF REAL DOMESTIC PRODUCT, 1981-1988 1ST 4 MONTHS AND PERCENTAGE CHANGE FROM PREVIOUS YEAR

Seasonally adjusted (1981 = 100)

Year/	Textiles		Clothing		Durable Goods		Non-Durable Goods		All Manufacturing Industries	
Month	Index	Change (%)	Index	Change (%)	Index	Change (%)	Index	Change (%)	Index	Change (%)
1981	100.0		100.0		100.0		100.0		100.0	
1982	77.6	−22.4	88.8	−11.2	64.0	−16.0	90.6	−9.4	87.1	−12.9
1983	99.8	28.6	88.9	0.1	89.0	5.9	96.9	7.0	92.7	6.5
1984	101.4	1.6	96.2	8.3	109.8	23.4	103.7	7.1	106.9	15.4
1985	102.0	0.6	96.8	0.7	118.2	7.7	106.8	3.0	112.8	5.5
1986	105.9	3.8	100.5	3.8	120.2	1.7	110.0	3.0	115.4	2.3
1987	113.9	7.6	103.4	2.9	127.9	6.4	113.0	2.7	120.9	4.7
1988 JAN	118.2	8.4	104.2	5.7	136.2	12.2	114.5	2.8	125.9	8.0
FEB	114.9	4.0	100.8	−3.4	134.5	9.4	114.0	1.4	124.8	5.8
MAR	115.3	2.9	103.8	−2.2	135.7	9.8	114.1	0.4	125.5	5.6
APR	114.4	3.4	102.9	−2.0	136.5	10.4	113.6	0.8	125.8	6.1

SOURCE: Statistics Canada, Cat. 61−005 Monthly (June 1987 and December 1987), and 15-001 Monthly.

The annual data for 1987 continued to indicate a strong performance in textiles and a satisfactory growth in clothing. Monthly data, however, showed that the recent growth trend peaked in October 1987 for textiles and in July 1987 for clothing. Since that time the real domestic product of these two industries has declined (Chart 1). No such decline is perceptible for all manufacturing, which could indicate that while the overall economy continued to grow the textile and clothing cycle reached its peak in 1987 and has lost momentum since then.

The first sign of a turning point showed up in the capacity utilization rates. These rates grew fairly regularly between 1982 and 1987 but, during the first quarter of 1988, decreased in both primary textiles and clothing.

Textile products, a part of the textile industry, were still growing at the beginning of 1988. The demand for carpets and other textile household products remained strong despite the weakening of demand for apparel textiles, knitting yarns and apparel (Table 5).

Table 5

CAPACITY UTILIZATION RATES IN THE TEXTILE AND CLOTHING INDUSTRIES AND IN ALL MANUFACTURING INDUSTRIES, 1981-1988 1ST QUARTER

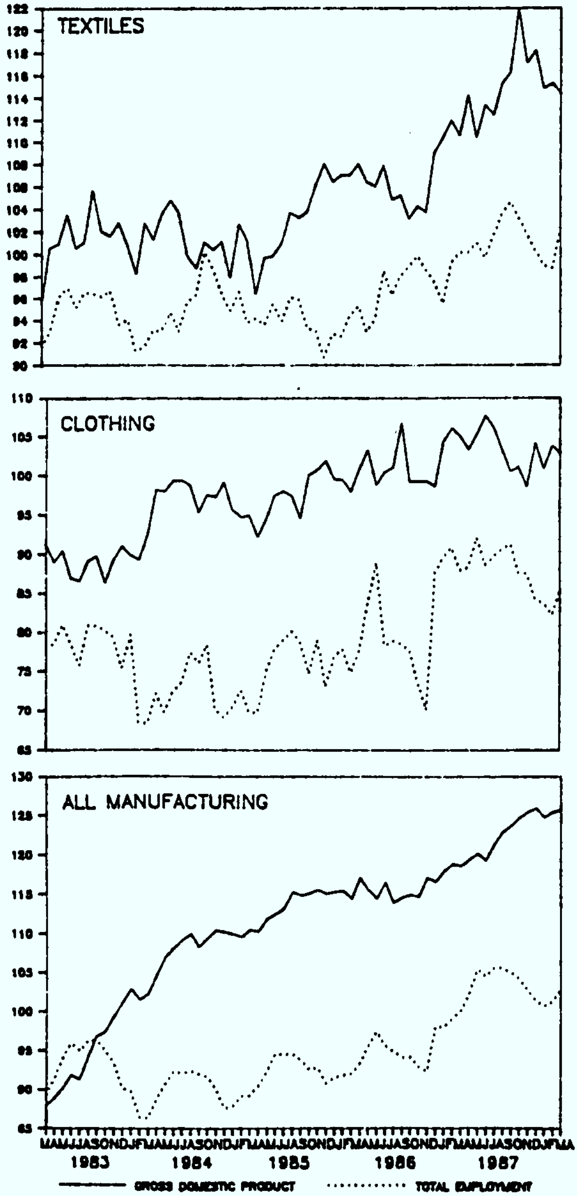
Year	Textile Industry			Clothing	All Manufacturing Industries		
	Primary Textiles	Textile Products	Textile Industry	Industry	Durable Goods	Non-Durable Goods	Total
1981	86.0	88.2	87.0	91.5	71.9	83.3	77.3
1982	65.4	69.8	67.4	81.4	58.2	73.9	65.6
1983	87.2	86.5	86.9	82.6	60.2	77.3	68.3
1984	87.5	89.0	88.2	89.9	72.6	81.7	76.9
1985	87.1	89.7	88.2	90.9	76.0	82.3	79.0
1986	89.8	92.0	90.8	94.8	74.1	83.7	78.6
1987	96.2	96.3	96.3	96.8	75.3	84.3	79.6
1988 1st Quarter	95.0	99.1	96.8	94.3	77.3	83.6	80.3

SOURCE: Statistics Canada, Cat. 31-003 Quarterly (Capacity utilization rates shown for the total "Textile Industry" are TCB estimates).

A comparison between the real growth of production and the increase in capacity utilization rates in 1982 and 1987 demonstrates that, globally, neither the textile nor the clothing industry have expanded their production capacities. Between these two years, production in textiles grew by 46.1 per cent and the capacity utilization rate increased by 47.1 per cent; in clothing, production grew by 16.8 per cent and the

Chart 1

INDICES
GROSS DOMESTIC PRODUCT (SEASONALLY ADJUSTED) AND ESTIMATED TOTAL EMPLOYMENT
1981 = 100.0



capacity utilization rate by 18.9 per cent. These global growth rates were similar enough to indicate that any major build up in new production capacity had not occurred. The large new investments that were made during the 1982-1987 period by the textile and clothing industries were of a defensive nature: aimed at increased productivity and efficiency without increasing production capacity.

3. EMPLOYMENT, HOURS WORKED AND PRODUCTIVITY

Textile and clothing industries employment data have been difficult to analyze because of changes in the statistical procedures. There were two major changes: (1) an updating of the data series to the 1980 Standard Industrial Classification (SIC) basis which resulted in statistical shifts between the textile and clothing industries and between these and other manufacturing industries. The updating was done for the 1981-85 period but had to be estimated for 1986 and onward. (2) An expanded scope of the employment survey in 1987, which resulted in a more complete coverage of smaller firms, as opposed to the sample coverage of prior years, which particularly affected industries with large numbers of small firms, such as clothing.

The first change did not produce major distortions in the global employment series for textile and clothing. The second change did produce distortions in the clothing industry with approximately two thirds of the 12.7 per cent increase in employment in clothing in 1987 ascribable to the more complete coverage of small firms (Table 6). A 12.7 per cent increase combined with a 2.9 per cent growth in output is manifestly inconsistent. Even a more modest 3 or 4 per cent growth in employment would result in stationary or declining productivity.

The combined textile and clothing employment in 1987 stood at 178.3 thousand employees, about the same as the previous peak year of 1981. However the effect of the inclusion of small firms in 1987 may be estimated at from 10 to 11 thousand employees, which should be regarded as the number of jobs that were lost between the two peak years 1981 and 1987.

During the first four months of 1988 employment tended to stabilize in textiles and to diminish in clothing following their respective production pattern.

The same picture is indicated through the average number of hours worked per week in the two industries. The average hours worked in the textile industry rose from 38.7 hours in 1986 to 39.1 hours in 1987.

Table 6

EMPLOYMENT IN TEXTILE AND CLOTHING INDUSTRIES, 1981-1988 1ST 4 MONTHS AND PERCENTAGE CHANGE FROM PREVIOUS YEAR

Year	Textile		Clothing		Textile and Clothing Industries		All Manuf. Industries	
	Empl. (000)	Change (%)	Empl. (000)	Change (%)	Empl. (000)	Change (%)	Empl. (000)	Change (%)
1981	64.9	−2.6	113.7	−0.4	178.6	−1.2	1854.0	0.2
1982	57.1	−12.0	106.8	−6.0	164.0	−8.2	1702.3	−8.2
1983	60.8	6.5	109.8	2.7	170.6	4.0	1671.1	−1.8
1984	60.1	−1.2	110.6	0.7	170.7	0.1	1722.0	3.0
1985	57.9	−3.7	110.9	0.2	168.8	−1.1	1766.8	2.6
1986	60.8	5.0	104.1	−6.2	164.8	−2.3	1739.2	−1.6
1987	61.1	0.4	117.2	12.7	178.3	8.1	1900.3	9.3
1988 JAN	60.5	2.7	111.1	−2.8	171.6	−0.9	1876.9	3.1
FEB	59.4	2.8	110.5	−5.5	169.9	−2.8	1865.6	2.7
MAR	59.1	−1.8	109.0	−8.0	168.2	−6.0	1876.5	2.2
APR	61.1	0.2	112.8	−2.3	173.9	−1.5	1906.2	2.7

SOURCE: Statistics Canada, Cat. 31-203 (for 1981-85), 72-002 and CANSIM Matrices 1432 and 8003 (for 1986-88). The data have been adjusted to conform to the 1980 SIC definitions of these industries.?

By April of 1988 the average had declined to 39.0 hours. In clothing the turn-around was more visible: from 36.0 average hours worked per week in 1986, to 36.9 hours in 1987 and then a decline to 36.6 hours in April 1988 (Table 7).

Table 7

AVERAGE HOURS WORKED PER WEEK* IN THE TEXTILE AND CLOTHING INDUSTRIES AND IN ALL MANUFACTURING, 1981-1988 1st 4 Months

Year	Textile	Clothing	All Manufacturing
1981	39.0	35.8	38.5
1982	38.0	34.8	37.7
1983	39.3	36.1	38.4
1984	39.5	35.8	38.5
1985	39.5	36.5	38.8
1986	38.7	36.0	38.8
1987	39.1	36.9	38.8
1988 JAN	39.6	36.3	38.9
FEB	39.7	36.5	38.8
MAR	38.7	36.6	38.9
APR	39.0	36.6	39.0

* Including overtime, of hourly-rated employees.

SOURCE: Statistics Canada, CANSIM Matrices 1434, 2932, 8005 and 8018. The data have been adjusted to conform to 1980 SIC definitions of these industries.

Due to changes in statistical procedures productivity measures have been distorted for the clothing industry. If better coverage of small firms has artifically added between 10 and 11 thousand employees to employment, real domestic product per employee and real domestic product per hour worked have been depressed proportionately. Between 1986 and 1987 Statistics Canada data have indicated a decrease in productivity of 9 per cent in real domestic product per employee in clothing and of 13 per cent in real domestic product per hour worked. As shown in Table 8, productivity allegedly went down in clothing from 109.8 in 1986 to 100.3 in 1987 for RDP per employee and from 127.1 to 109.9 for RDP per hour worked.

Table 8

INDEX OF REAL DOMESTIC PRODUCT PER EMPLOYEE AND PER HOUR WORKED IN THE TEXTILE AND CLOTHING INDUSTRIES AND IN ALL MANUFACTURING, 1981-1988 1st 4 Months
(1980 = 100)

Year	RDP Per Employee			RDP per Hour Worked		
	Textile Industry	Clothing Industry	All Manu-facturing	Textile Industry	Clothing Industry	All Manu-facturing
1981	100.0	100.0	100.0	100.0	100.0	100.0
1982	88.1	94.5	94.9	97.4	112.9	102.0
1983	106.5	92.1	102.9	104.0	113.1	89.4
1984	109.5	98.9	115.1	106.3	121.0	106.7
1985	114.4	99.3	118.4	105.5	122.1	109.5
1986	113.0	109.8	123.0	109.1	127.1	110.0
1987	121.0	100.3	117.9	117.1	109.9	104.5
1988 JAN	126.8	106.6	124.4	121.4	122.8	110.9
FEB	125.4	103.7	124.0	119.6	118.3	111.0
MAR	126.5	108.3	124.0	126.0	124.1	110.5
APR	121.5	103.7	122.3	118.1	118.8	108.3

SOURCE: Appendix Tables A-3 and A-4.

If the 1987 employment numbers are corrected and restated on the basis of the method of estimating employment used in previous years, a more credible development of productivity will result. The adjustment would push the indices for 1987 to 110-111 for RDP per employee, instead of 100.3 appearing in the table, and to 125-127 for RDP per hours worked, instead of 109.9. This range of productivity appears more consistent and more appropriate.

As noted previously, statistical methodology changes did not affect the data of the textile industry to any meaningful extent therefore the textile productivity results are probably correct. They indicate a 21 per cent increase in the RDP per employee and a 17 per cent increase in RDP per hour worked between the peak years of 1981 and 1987. Productivity in textiles grew at about the same rate or more rapidly than in manufacturing in general.

4. INVESTMENTS

After four years of steady growth, new investments in the textile and clothing industries remained stable in 1987 (Table 9).

Table 9

NEW INVESTMENTS IN THE TEXTILE AND CLOTHING INDUSTRIES AND IN ALL MANUFACTURING INDUSTRIES, 1981-1988
Millions of Current Dollars and Indices
(1981 = 100)

	Textile and Clothing Industries		All Manufacturing Industries	
Year	$ Million	Index	$ Million	Index
1981	218.0	100.0	12739.3	100.0
1982	179.1	82.2	11492.5	90.2
1983	202.9	93.1	8858.4	69.5
1984	241.2	110.6	8886.7	69.8
1985	252.4	115.8	11516.1	90.4
1986	316.1	145.0	14249.3	111.9
1987	315.9	144.9	14953.5	117.4
1988 (Revised intentions)	370.9	170.1	19163.0	150.4

SOURCE: Appendix Table A-5.

As indicated in previous annual reports, the rapid expansion in the 1983-1986 period reflected two factors: increased investment efforts as a result of the 1982 recession and the special financial assistance that was made available under the Canadian Industrial Renewal program.

While investment intentions for 1988 represent a significant 17 per cent increase over the previous year, they are somewhat lower than the 28 per cent increase in all manufacturing. However, over the 1981 to 1988 period, investments in textiles and clothing grew by 45 per cent, compared to 17 per cent in all manufacturing industries.

Revised investment intentions for 1988 reflect, in part, intentions to improve the competitive abilities of the respective industries as a result of the Canada-United States free trade initiative. This is particularly true for the textile industry which anticipates a 19 per cent expansion of investment in new machinery and equipment. The increase in investment for new buildings will exceed 75 per cent over 1987 (Appendix Table A-5).

In the clothing and knitting industries new investment intentions are more moderate for 1988. Expenditures for new machines and equipment are projected to grow by 14 per cent in the clothing industry and 19 per cent in the knitting industry while expenditures for new buildings are forecast to diminish in the clothing industry but increase slightly in the knitting industry. These 1988 developments are consistent with the economic situation that these two sectors have been facing since last fall. Clothing production was hampered by a slowing down of final demand which was reflected in a weakening of new orders from retailers due to rising inventories.

Similarly, the knitting industry has been facing a reversal in fashion trends which after two years of brisk activity, have been moving away from sweaters. Under these conditions the slowing down of investment projects in clothing and knitting is a normal consequence of the less favourable outlook for these industries over the next year or two.

Generally about 80 per cent of total textile and clothing investment takes place in the textile industry. Compared to clothing and knitting, production processes in the textile industry are highly capital intensive: saving a job in the textile industry would require an investment of approximately $200,000, while one or two tenths of this amount would produce the same result in clothing or knitting.

With revised investment intentions sharply up for 1988 in textiles and more moderately up in clothing and knitting, 81 per cent of total new investment in these three sectors will be made by the textile industry, approximately 12 per cent by the clothing industry and approximately 7 per cent by the knitting industry (Table 10).

As can be seen in Table 11, 85.4 per cent of the intended investment in 1988 will be in machinery and equipment and 14.6 per cent in new buildings; substantially the same shares as in 1987. In textile these shares are intended to be 85.9 per cent for new machinery and equipment and 14.1 per cent for new buildings while in all manufacturing industries they will reach 83.1 and 16.9 per cent respectively.

Table 10

DISTRIBUTION OF NEW INVESTMENTS BETWEEN TEXTILE, CLOTHING AND KNITTING INDUSTRIES, 1981-1988
Per Cent

Year	Textile	Clothing	Knitting
1981	75.1	17.1	7.8
1982	80.2	10.9	8.9
1983	75.8	11.2	13.0
1984	77.4	12.0	10.6
1985	81.8	11.7	6.5
1986	81.0	12.2	6.8
1987	76.3	16.4	7.3
1988 (revised intentions)	81.0	11.6	7.4

SOURCE: Appendix Table A-5.

Table 11

COMPOSITION OF NEW INVESTMENTS IN THE TEXTILE INDUSTRIES AND IN ALL MANUFACTURING, 1981-1988
Per Cent

	1981	1982	1983	1984	1985	1986	1987	1988 (Revised Intentions)
TEXTILE								
Buildings	12.8	15.3	15.9	13.6	13.1	13.0	10.0	14.1
Machinery & Equipment	87.2	84.7	84.1	86.4	86.9	87.0	90.0	85.9
CLOTHING								
Buildings	35.2	25.1	18.0	14.8	19.7	11.7	37.6	13.8
Machinery & Equipment	64.8	74.9	82.0	85.2	80.3	88.3	62.4	86.2
KNITTING								
Buildings	18.2	15.7	34.8	34.9	10.3	5.1	21.7	22.1
Machinery & Equipment	81.8	84.3	65.2	65.1	89.7	94.9	78.3	77.9
ALL TEXTILES								
Buildings	17.0	16.4	18.6	16.0	13.7	12.3	15.4	14.6
Machinery & Equipment	83.0	83.6	81.4	84.0	86.3	87.7	84.6	85.4
ALL MANUFACTURING INDUSTRIES								
Buildings	24.1	25.3	21.4	20.5	22.3	17.7	18.1	16.9
Machinery & Equipment	75.9	74.7	78.6	79.5	77.7	82.3	81.9	83.1

SOURCE: Appendix Table A-5.

A higher proportion of investment in machinery and equipment represents a focus on improved competitive capacity. On the other hand a high proportion of new investment in buildings often represents additional production capacity. The continuous high levels of investment in machinery and equipment through the 1980's were clearly aimed at improved competitive capacity.

This is also evident in the share that new investment represents of total investment in these three manufacturing sectors, that is, investment in new assets as opposed to repair, maintenance and upgrading of existing assets. This ratio has gradually grown as regards investment in buildings, and in investment in new machinery and equipment (Table 12). From 61.1 per cent for the combined results of the three sectors in 1982, the share of new machinery and equipment grew to 67.6 per cent in 1986 and is expected to reach 71.2 per cent in 1988.

Table 12

RELATIVE WEIGHT OF NEW INVESTMENTS IN TOTAL INVESTMENTS IN TEXTILE INDUSTRIES AND IN ALL MANUFACTURING, 1981-1988
Per Cent

	1981	1982	1983	1984	1985	1986	1987	1988 (Revised Intentions)
TEXTILE								
Buildings	52.4	59.0	62.1	61.0	62.9	66.1	60.0	70.7
Machinery & Equipment	64.6	59.4	59.5	62.4	61.7	66.0	66.6	69.5
CLOTHING								
Buildings	82.9	67.1	54.7	55.8	63.7	66.2	87.4	72.8
Machinery & Equipment	75.3	67.0	68.0	75.8	69.4	73.6	74.8	78.2
KNITTING								
Buildings	60.8	67.6	82.9	79.5	58.6	55.0	84.7	89.7
Machinery & Equipment	70.2	73.2	71.4	71.2	75.9	78.7	77.9	81.7
ALL TEXTILES								
Buildings	61.0	60.9	65.1	63.7	62.8	65.8	71.1	72.7
Machinery & Equipment	69.2	61.1	61.5	64.5	63.3	67.6	68.1	71.2
ALL MANUFACTURING INDUSTRIES								
Buildings	78.3	78.5	70.7	66.5	74.2	74.4	74.3	76.8
Machinery & Equipment	70.2	67.9	62.2	59.4	63.3	67.5	67.7	72.2

SOURCE: Appendix Table A-5.

The present dynamism of new investment in all three textile related sectors, despite some recent weakening in the market demand for all these sectors, is an indication of a longer term strategy to improve international competitive capacity relative to low cost textile exporting countries and to the United States.

5. REGIONAL DISTRIBUTION OF EMPLOYMENT AND NEW INVESTMENTS

With close to 90 per cent of the employment and 94 per cent of the new investment, Québec and Ontario remain the main location for Canadian textile activities. However, the realignment of activities between the two provinces, which started in the late 1970's, continues.

Québec's share of employment in the textile industry has been steadily decreasing while Ontario's share has grown. Québec's share of Canadian textile employment in 1981 was 47.2 per cent but fell to 41.8 per cent in the first quarter of 1988. In the same interval, Ontario's share rose from 46.9 per cent to 49.6 per cent. The realignment in the distribution of new investment has been even more pronounced. Québec's share of new Canadian textile investment has declined from 50.2 per cent in 1981 to 35.7 per cent while Ontario's share has grown from 44.3 per cent to 59.1 per cent (Table 13).

This realignment has been less obvious in clothing and knitting. Québec's share of employment in these two industries has either remained stationary as in clothing or has increased slightly as in knitting. But the Québec share of new investment in the clothing industry, though higher than in 1981, remained low: with a share of employment of approximately 60 per cent in 1987 and early 1988, Québec's share of new investment has been in the 50 per cent range. Ontario's share of employment in the clothing industry has been approximately 26 per cent, but its share of new investment was over 33 per cent in 1987. As for new investment in knitting, Québec's share remained more in line with its share in employment, as was the case in Ontario, with share of new investment slightly less than share of employment in 1987.

Ontario's share of new investment in the textile and clothing areas has continued to be significantly above the share of employment. This has meant that Ontario has been the main beneficiary of the continuous process of restructuring and modernization.

Table 13

REGIONAL DISTRIBUTION OF EMPLOYMENT AND NEW INVESTMENTS, 1981-1988, SELECTED YEARS

	Employment				New Investments			
	1981	1985	1987	1988 1st Quarter	1981	1985	1987	1988 Intentions
TEXTILE								
Québec	47.2	43.6	42.9	41.8	50.2	35.6	35.8	35.7
Ontario	46.9	48.4	48.8	49.6	44.3	62.2	60.5	59.1
Rest of Canada	5.9	8.0	8.3	8.6	5.5	2.2	3.7	5.2
Canada	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
CLOTHING								
Québec	60.1	57.6	60.6	59.7	35.5	52.7	49.1	49.0
Ontario	26.0	29.2	26.3	25.9	34.1	32.7	33.3	38.3
Rest of Canada	13.9	13.2	13.1	14.4	30.4	14.6	17.6	12.7
Canada	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
KNITTING								
Québec	52.9	55.1	56.5	56.5	64.7	47.9	57.0	52.5
Ontario	36.9	35.8	33.7	33.9	32.4	48.5	32.6	44.6
Rest of Canada	10.2	9.1	9.8	9.6	2.9	3.6	10.4	2.9
Canada	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
ALL TEXTILES								
Québec	54.3	52.1	54.0	52.9	48.8	38.4	39.5	38.2
Ontario	35.3	37.0	35.0	35.3	41.6	57.9	54.0	55.9
Rest of Canada	10.4	10.9	11.0	11.8	9.6	3.7	6.5	5.9
Canada	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

SOURCE: Statistics Canada, CANSIM matrices 1432, 1462, 1467, 8003, 8303 and 8363 (for Employment), 61-205 and 61-206 (for Investments), and Appendix Tables A-6 and A-7.

6. FINANCIAL SITUATION

Two consecutive years of sustained activity coupled with a low international exchange value for the Canadian dollar, have combined into a significant improvement in the profitability of the textile (including knitting) and clothing industries(1).

(1) Statistical data appearing in this chapter cover those firms with total assets over 10 million dollars. Data for 1981 to 1985 are consolidated annual data, while the data for 1986 and 1987 are based on quarterly data converted to an annual basis and adjusted to eliminate the systematic errors showing in quarterly data when compared to the annual data of preceding years. Nevertheless, when annual consolidated data become available for those years, they could well show discrepancies of one or two percentage points when compared to Board estimates.

Sustained activity has meant high volume of production and sales and a high degree of capacity utilization, prerequisites for hightened profitability.

The low exchange value of the Canadian dollar made imported textiles and clothing more expensive and lessened the price pressure on Canadian producers. This, in turn, made it easier for Canadian producers to roll their cost increases into their selling prices and thereby improve their profitability.

As shown in Table 14, all of the after tax profit ratios in textiles (including knitting) and clothing improved considerably in 1986 and 1987. Return on investment (profits after tax/equity) reached 18.6 per cent in 1987 in textiles as against 10.2 per cent in 1981. For the same two years clothing achieved 19.5 per cent and 13.1 per cent while all manufacturing industries improved marginally with 11.6 per cent in 1987 as against 11.5 per cent in 1981. All of the after tax profit ratios of the textile and clothing industries have been significantly better than those of all manufacturing.

The healthy profits of 1986 and 1987 helped the textile and clothing industries to strengthen their financial position. Between 1981 and 1987, the long-term debt/equity ratio declined in textiles from 28.9 per cent to 11.6 per cent and in clothing from 9.6 to 7.5 per cent. The current liabilities/equity ratio declined similarly from 78.4 per cent in 1981 to 62.0 per cent in 1987 in textiles and from 135.5 per cent to 95.3 per cent in clothing. The "acid test" ratio, current assets less inventories relative to current liabilities also improved, particularly in clothing. Between 1981 and 1987, this ratio grew from 0.87 to 0.95 in textiles and from 0.80 to 1.17 in clothing. It recognizes that inventories may experience significant value changes depending on the general economic situation.

These favourable financial results in textiles and clothing should be interpreted with caution. In part they reflect the fact that only those companies with assets over 10 million dollars have been included. Smaller companies or private family businesses were not included and it may be that these companies did not perform as successfully. It should also be remembered that the proportion of such smaller companies is much higher in textiles and clothing than in many other manufacturing industries.

The structural characteristics of these two sectors should not be ignored. The capital employed in the production of textiles and clothing is less, often considerably less, than in other manufacturing industries,

Table 14

SELECTED FINANCIAL RATIOS IN THE TEXTILE (INCLUDING KNITTING), CLOTHING AND ALL MANUFACTURING INDUSTRIES, 1981-1987

(in per cent unless otherwise indicated)

	1981	1982	1983	1984	1985	1986 (Est.)*	1987 (Est.)*
Current Liabilities/Equity							
Textile and Knitting Ind.	78.45	76.08	68.94	73.13	64.94	63.61	62.04
Clothing Industry	135.52	117.15	113.00	119.58	111.46	99.92	95.29
All Manufacturing Ind.	67.47	63.96	61.64	60.01	59.91	54.65	54.37
Long-term Debt/Equity							
Textile and Knitting Ind.	28.93	31.11	27.54	27.18	22.37	21.85	11.65
Clothing Industry	9.64	11.59	9.69	12.33	8.60	8.32	7.50
All Manufacturing Ind.	31.53	34.36	33.38	29.86	26.61	28.56	26.03
Profits After Tax/ Capital Employed							
Textile and Knitting Ind.	7.37	1.68	8.61	7.65	3.96	11.62	15.20
Clothing Industry	11.63	7.68	12.70	12.69	12.58	17.38	17.80
All Manufacturing Ind.	7.91	2.38	4.62	7.78	6.61	6.05	8.25
Profits After Tax/Total Income							
Textile and Knitting Ind.	3.01	0.73	3.79	3.21	1.76	5.36	6.75
Clothing Industry	2.63	1.81	3.00	2.99	3.09	4.34	4.66
All Manufacturing Ind.	4.04	1.30	2.44	3.90	3.45	3.35	4.61
Profits After Tax/Equity							
Textile and Knitting Ind.	10.23	2.36	11.79	10.50	5.23	15.05	18.56
Clothing Industry	13.10	8.80	14.29	14.61	14.07	19.25	19.54
All Manufacturing Ind.	11.52	3.54	6.81	11.12	9.23	8.59	11.58
Current Assets/Cur. Liabilities (Quick Ratio)							
Textile and Knitting Ind.	1.76	1.68	1.78	1.77	1.78	1.76	1.72
Clothing Industry	1.56	1.63	1.69	1.64	1.70	1.86	1.91
All Manufacturing Ind.	1.60	1.53	1.59	1.62	1.56	1.63	1.58
Current Assets Less Inventories/ Current Liabilities ("Acid Test" Ratio)							
Textile and Knitting Ind.	0.87	0.87	0.94	0.94	0.94	0.93	0.95
Clothing Industry	0.80	0.85	0.94	0.88	0.89	1.11	1.17
All Manufacturing Ind.	0.79	0.77	0.85	0.88	0.90	0.94	0.94

*Based on quarterly data.

SOURCE: Appendix Tables A-8, A-9 and A-10.

and therefore, shareholders' equity is less. As a result, after tax profit and other financial ratios will tend to be higher in textiles and clothing, than in overall manufacturing. The only reliable comparisons, therefore, are those of a series of years for the same industry. They would show that, in textiles and clothing, 1987 ended with the best financial results of the 1980's.

7. WAGES AND PRICES

Wage increases in manufacturing, including textiles and clothing, continued at moderate levels in 1987. Average hourly earnings advanced in 1987 by 2.3 per cent in total manufacturing, by 1.8 per cent in clothing and by 0.2 per cent in textiles (Table 15). Between the first quarter of 1987 and the first quarter of 1988 average hourly earnings increased by 3.8 per cent in total manufacturing, by 4.2 per cent in textiles but decreased by 0.1 per cent in clothing.

Table 15

INCREASE IN AVERAGE HOURLY EARNINGS OF EMPLOYEES PAID BY THE HOUR IN THE TEXTILE, CLOTHING, AND ALL MANUFACTURING INDUSTRIES 1981-1988 1st Quarter
(per cent)

Industry	1982/81	1983/82	1984/83	1985/84	1986/85	1987/86	1988/87* 1st Quarter
Textiles	10.2	3.5	6.1	3.8	5.0	0.2	4.2
Clothing	8.0	5.3	2.0	3.5	3.3	1.8	−0.1
All Manufacturing	11.5	3.4	5.2	3.9	3.3	2.3	3.8

* Average of first quarter results of both years.

SOURCE: Appendix Table A-11.

The average hourly earnings reflects a combination of wage rates and average hours worked per week. Average hours worked in the first quarters of 1987 and 1988 remained stable in total manufacturing, increased in textiles and marginally decreased in clothing. The somewhat higher growth of average hourly earnings in textiles, as compared to total manufacturing, partly reflected more overtime in textiles; the decline of these earnings in clothing, on the other hand, indicated a decline in overtime and a generally less favourable trend.

Average earnings in the textile industry in 1987 stood at 76.2 per cent of the average of all manufacturing, as compared to 76.9 per cent in 1981. A slightly higher growth of average hourly earnings in textiles during the first quarter of 1988 nearly re-established the previous 1981 ratio of 77. In clothing, average weekly earnings, as a percentage of those of all manufacturing, went down from 59 per cent in 1981 to 56.1 per cent in 1987 and 55 per cent during the first quarter of 1988 (Table 16).

Table 16

AVERAGE WEEKLY EARNINGS OF EMPLOYEES PAID BY THE HOUR AS A PERCENTAGE OF AVERAGE WEEKLY EARNINGS IN ALL MANUFACTURING INDUSTRIES 1981-1988 1st Quarter

(per cent)

Industry	1981	1982	1983	1984	1985	1986	1987	1988 1st Quarter
Textiles	76.9	75.9	76.9	77.7	77.1	76.9	76.2	76.8
Clothing	59.0	56.8	57.8	55.3	55.8	55.2	56.1	55.1
All Manufacturing	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

SOURCE: Appendix Table A-12.

Between 1981 and 1987 average hourly earnings rose 32 per cent in textiles, 26 per cent in clothing and 33 per cent in all manufacturing. The real domestic product per hour worked grew by 17 per cent in textiles, 25 per cent in clothing and 10 per cent in all manufacturing. Wage increases have outpaced advances in productivity by a significant margin in textiles but remained more closely in line in clothing (Appendix Table A-4).

Up to the mid 1980's, textile prices rose slowly because of the global weakness in natural and synthetic fibre prices, as indicated on Table 17. The combination of a moderate demand for fibres, of a more than satisfactory supply of fibres and of the rising exchange value of the Canadian and U.S. dollars during that period, depressed fibre prices. In 1986 the index of prices (1981 = 100) fell to 82.5 for vegetable fibres, to 79.5 for animal fibres and to 88.2 for synthetic fibres. Since then the increased international demand and the weakened exchange rate have pushed fibre prices up.

Table 17

INDEX OF PRICES OF TEXTILE FIBRES
1981-1988 1st 4 Months
(1981 = 100)

Year	Vegetable Fibres	Animal Fibres	Synthetic Fibres
1981	100.0	100.0	100.0
1982	85.2	93.4	99.8
1983	88.0	90.4	92.8
1984	93.5	91.1	96.1
1985	87.0	74.8	92.8
1986	82.5	79.5	88.2
1987	93.0	92.1	89.0
1988 JAN	94.2	114.5	92.1
FEB	93.8	107.0	91.9
MAR	93.6	103.6	91.8
APR	94.7	103.9	90.5

SOURCE: Statistics Canada, CANSIM matrices 1962 and 1980.

Yarn prices remained relatively stable from 1981 to 1988. Fabric prices increased moderately throughout the period, although fabric price rises accelerated in 1987 and in early 1988. During the five years

Table 18

INDEX OF YARN AND FABRIC PRICES
1981-1988 1st 4 Months
(1981 = 100)

	Yarns				Fabrics		
Year	Spun Acrylic Fibres	Other Spun Yarns	Filament Nylon	Filament Other Than Nylon	Worsted	Nylon	Double Knit
1981	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1982	105.6	96.9	94.7	107.0	99.0	108.7	97.3
1983	106.5	96.2	95.2	106.5	97.2	111.3	98.5
1984	106.4	98.0	95.2	106.5	99.5	115.9	98.5
1985	105.9	98.8	93.8	108.6	100.0	118.2	97.0
1986	105.8	97.1	94.5	109.8	101.3	119.9	96.9
1987	107.5	100.9	95.8	109.1	110.8	124.8	112.6
1988 JAN	108.7	102.1	96.6	112.1	120.4	127.8	125.6
FEB	108.7	102.6	96.6	112.1	120.4	127.8	125.6
MAR	108.7	102.6	96.6	111.9	125.2	127.8	125.6
APR	108.7	102.6	96.9	111.8	125.8	127.8	125.6

SOURCE: Statistics Canada, CANSIM matrix 1962.

between 1981 and 1986 price indices for worsted fabrics advanced from 100 to 101.3, for nylon fabrics from 100 to 119.9 while double knits declined from 100 to 96.9 (Table 18). In 1987, the indices rose from 101.3 to 110.8 for worsted fabrics, from 119.9 to 124.8 for nylon fabrics and from 96.9 to 112.6 for double knits, further rises occurred during the first months of 1988.

Apparel prices not only reflected the evolution of fabric prices but better profit margins that had been made possible by a brisk consumer demand for clothing and by a depreciation of the exchange rate in 1986 and 1987 which increased prices of imported garments and reduced the downward pressure exerted by imports on domestic pricing policies (Table 19).

Table 19

INDEX OF PRICES OF APPAREL, TEXTILE PRODUCTS AND ALL INDUSTRIAL COMMODITIES

1981-1988 1st 4 Months (1981 = 100)

	Textile Products				Apparel			
Year	Yarns and Man-made Fibres	Fabrics	Other Textile Products	Total	Hosiery & Knitted Wear	Clothing & Accessories	Total	All Industrial Commodities
1981	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1982	100.4	104.0	105.0	103.5	106.3	105.9	106.0	106.7
1983	99.1	106.3	107.6	105.0	111.3	108.9	109.4	110.4
1984	101.5	109.8	111.6	108.4	113.6	111.5	112.0	115.4
1985	101.1	111.7	114.0	110.0	115.5	113.6	114.0	118.6
1986	100.1	112.2	117.7	111.3	117.3	117.0	117.1	119.6
1987	101.7	115.4	120.0	113.8	121.2	121.2	121.2	122.8
1988 JAN	103.6	118.3	122.5	116.3	123.1	123.5	123.4	126.4
FEB	103.9	118.6	122.0	116.3	123.0	123.8	123.7	125.8
MAR	103.8	119.0	121.9	116.4	123.3	124.3	124.1	126.1
APR	103.8	119.2	123.4	117.0	123.3	124.0	123.8	126.7

SOURCE: Statistics Canada, CANSIM matrices 1960 and 1962.

Changes in consumer prices for apparel have closely reflected changes in "all industrial commodities" selling prices. For the 1981-87 period, the "all industrial commodity" selling prices recorded a 22.8 per cent increase compared to a 24 per cent increase in the consumer price index for clothing and accessories.

Traditionally the consumer price index for apparel has grown at a slower rate than has the All-items Consumer Price Index. The difference between the rate of growth of the two indices reached 8.7 points in 1982 over 1981, 1.6 points in 1984 over 1983, 1.4 points in 1986 over 1985, but only 0.5 points in 1987 over 1986. Comparing consumer price rises between the first quarter of 1987 and 1988, the trend is reversed: prices for apparel grew by 5.5 points while the general consumer price index advanced by 4.1 points only. As indicated on Table 20, the acceleration in the rise of consumer prices for apparel was general and encompassed all categories of apparel.

Table 20

INCREASES IN THE CONSUMER PRICE INDEX FOR CLOTHING, 1982-1988 1st Quarter
(per cent)

Component Group	1982/81	1983/82	1984/83	1985/84	1986/85	1987/86	1988/87 1st Quarter
Men's Clothing*	6.0	3.8	1.6	2.5	2.0	4.3	5.4
Boys' Clothing*	6.7	3.6	2.1	2.2	1.9	3.0	4.0
Women's Clothing*	4.0	4.0	2.7	2.8	3.2	4.3	5.9
Girls' Clothing*	5.2	4.3	2.8	2.8	2.8	3.4	4.2
Apparel Only#	2.1	3.8	2.8	3.3	2.7	3.9	5.5
All-items Consumer Price Index	10.8	5.8	4.4	4.0	4.1	4.4	4.1

* Excludes footwear.
\# Excludes footwear and jewellery.

SOURCE: Statistics Canada, CANSIM Matrix 1922.

Among the major consumer expenditure components, "apparel only" exerted a stabilizing effect on the increase of the general consumer price index. Between 1982 and 1987, "apparel only" indicated the lowest or the second lowest rise among all components. Between the first quarters of 1987 and 1988, however, the positions were reversed. The 5.5 per cent increase for apparel ranks the second highest after the 7.3 per cent rise for tobacco and alcohol, a rise more indicative of taxation and monopolistic mark-up by provincial liquor boards, than of a genuine price increase (Table 21).

This reversal in the traditional ranking of price increases among the major expenditure components represents a new but probably short-lived experience. Sales of apparel have tended to slow down since the end of 1987, due to increasing consumer resistance to higher prices. Therefore it is becoming more difficult for apparel producers to pass on cost increases through higher prices.

Table 21

INCREASES IN THE CONSUMER PRICE INDEX FOR MAJOR CONSUMER EXPENDITURE COMPONENTS, 1982-1988 1st Quarter
(per cent)

Expenditure Component	1982/81	1983/82	1984/83	1985/84	1986/85	1987/86	1988/87 1st Quarter
Food	7.2	3.7	5.6	2.9	5.0	4.4	2.0
Housing	12.5	6.8	3.8	3.5	3.0	4.0	4.4
Clothing	5.6	4.0	2.5	2.8	2.8	4.2	5.3
Apparel Only*	2.1	3.8	2.8	3.3	2.7	3.9	5.5
Transportation	14.1	5.0	4.2	4.8	3.2	3.6	3.3
Health and Personal Care	10.6	6.9	3.9	3.6	4.2	5.0	4.7
Recreation, etc.	8.7	6.5	3.4	4.0	4.7	5.1	5.4
Tobacco and Alcohol	15.5	12.6	8.2	9.5	11.9	6.7	7.3
TOTAL	10.8	5.8	4.4	4.0	4.1	4.4	4.1

* Excludes footwear and jewellery.

SOURCE: Statistics Canada, CANSIM Matrix 1922.

8. EXTERNAL TRADE IN TEXTILE AND CLOTHING PRODUCTS

1987 was another prosperous year for the Canadian textile and clothing producers. As indicated earlier in this report, the volume of production grew by 7.9 per cent in textiles and 2.9 per cent in clothing. Because of the fashion trend, knitted apparel was in high demand during the first three quarters of the year.

Imports of textiles and clothing grew in 1987. Imports of yarn increased by 20.9 per cent in volume and 26.2 per cent in value, reflecting a strong demand for yarns. Fabric imports grew by 7.9 per cent in volume but by 2.7 per cent in value which reflected high volumes of imported, low cost, fabrics. Imports of clothing remained in line with domestic production: they grew by 2.8 per cent in volume and 10.7 per cent in value, while domestic production advanced by 2.9 per cent in volume and 5.3 per cent in value. The discrepancy between the two value growth rates was a consequence of the low exchange rate for the Canadian dollar in 1987.

a) Balance of Trade in Textile and Clothing Products

As in all previous years of the 80's, except 1982, the balance of trade in textile products indicated a further deterioration in 1987. The trade deficit for these products reached a record 3.9 billion dollars (Table 22).

Table 22

BALANCE OF TRADE IN TEXTILES AND CLOTHING, 1980-1987
Million dollars

Year	Textiles(1) Imports	Textiles(1) Exports	Textiles(1) Balance	Clothing(2) Imports	Clothing(2) Exports	Clothing(2) Balance	Total Balance
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	1,545.9	430.4	−1,115.5	985.2	241.9	−743.3	−1,858.8
1983	1,928.2	428.8	−1,499.4	1,195.9	219.6	−976.3	−2,475.7
1984	2,221.1	521.6	−1,699.5	1,611.3	290.3	−1,321.0	−3,020.5
1985	2,376.6	566.3	−1,810.3	1,672.6	326.1	−1,346.5	−3,156.8
1986	2,662.9	674.9	−1,988.0	2,041.3	382.3	−1,659.0	−3,647.0
1987	2,876.5	755.6	−2,120.9	2,261.3	451.8	−1,809.5	−3,930.4

(1) Including floor coverings, hosiery and knitted fabrics.
(2) Including knitted clothing.

SOURCE: Department of Regional Industrial Expansion, based on Statistics Canada data.

Between 1980 and 1987, the value of textile imports rose by 75 per cent while the value of textile exports grew by 78 per cent; the value of clothing imports increased by 191 per cent, nearly trippled over the seven years, while the value of exports, increasing by 96 per cent, nearly doubled. Due to the rapid growth in clothing imports the structure of the textile and clothing deficit has changed significantly. In 1980, 69 per cent of the overall trade deficit was attributable to textiles and 31 per cent to clothing. In 1987, only 54 per cent of the deficit was due to textiles but 46 per cent to clothing.

In 1987, imports of textiles exceeded exports of textiles in a ratio of 4 to 1 and imports of clothing in a ratio of 5 to 1. These ratios did not change relative to the previous year. Nevertheless, the growth of exports in 1987, 11 per cent in textiles and 18 per cent in clothing, did exceed the growth of imports, 8 per cent in textiles and 12 per cent in clothing.

b) Sources of Imports

In terms of value the grip of industrialized countries on Canada's textile imports has been easing with imports of textiles from developing countries steadily increasing. In 1982 the six industrialized countries which were the main countries of origin of Canadian textile imports, represented 76 per cent of the total textile imports. Their share had decreased to 62 per cent by 1987. On the other hand, the share of textile imports originating from the six most important low cost countries had increased from 13 per cent in 1982 to 23 per cent in 1987 (Table 23).

Among the industrialized countries the United States lost the greatest share of textile imports. The U.S. share fell from 56.9 per cent in 1982, to 43.5 per cent in 1987. In the same two years, South Korea's share grew from 3.0 to 7.1 per cent, China's from 3.7 to 5.1 per cent, Taiwan's from 1.7 to 3.8 per cent and Hong Kong's share from 1.5 to 2.9 per cent. Globally, the share of these four dominant low cost countries increased by 9 percentage points between 1982 and 1987.

The share distribution in the value of imports of clothing has remained relatively constant over the last five years. The total share of the six most important industrialized countries has been hovering around 20 per cent while the low cost countries have represented some 80 per cent. However, among low cost countries, the three traditional sources of imports (Hong Kong, South Korea and Taiwan) have lost market share to a constant flow of new countries headed by the People's Republic of China. Imports of clothing from China more than quadrupled over the last five years, growing from 63.7 million dollars in 1982 to 260.3 million dollars in 1987. Imports from "other" sources, mainly recent new countries, increased from 105.1 million dollars in 1982 to 368.4 million in 1987 (Table 24).

As in textiles, the United States saw its share in clothing imports decline from 11.4 per cent in 1982 to 5.5 per cent in 1987. The leading industrialized source of imports over the last two years has been Italy. Italy and West Germany have been good examples of success in marketing design and quality during the past five years: Canadian imports from these two countries increased at a rate higher than those from China despite the high exchange rates of the Italian lira and the German mark.

c) Import Restraints and their Utilization

The 1987 restraint utilization rates require interpretation due to the changes which occurred in the base levels following the negotiations of new bilateral restraint agreements for the 1987-1991 period. These changes have been particularly important to textiles.

CANADIAN IMPORTS OF TEXTILES(1) FROM MAJOR SOURCES, 1982 - 1987

Sources	1982		1983		1984		1985		1986		1987	
	Million dollars	Per cent	Million dollars	Per cent	Million dollars	Per cent	Million dollars	Per cent	Million dollars	Per cent	Million dollars	Per cent
INDUSTRIALIZED COUNTRIES												
United States	879.4	56.9	1,066.5	55.3	1,125.5	50.7	1,145.1	48.2	1,159.1	43.5	1,250.3	43.5
Italy	67.6	4.4	92.4	4.8	130.4	5.9	145.5	6.1	166.8	6.3	133.4	4.6
Japan	106.7	6.9	114.6	5.9	120.9	5.4	120.3	5.1	154.8	5.8	151.2	5.3
United Kingdom	59.0	3.8	69.3	3.6	90.9	4.1	107.8	4.5	108.2	4.1	108.2	3.8
West Germany	38.5	2.5	52.0	2.7	70.1	3.2	82.8	3.5	102.4	3.8	89.7	3.1
France	27.7	1.8	34.6	1.8	45.3	2.0	54.3	2.3	58.0	2.2	50.3	1.7
Sub-total	1,178.9	76.3	1,429.4	74.1	1,583.1	71.3	1,655.8	69.6	1,749.3	65.7	1,783.1	62.0
LOW-COST COUNTRIES												
South Korea	47.3	3.0	62.9	3.3	84.3	3.8	117.1	4.9	165.8	6.2	205.2	7.1
China, P.R.	57.6	3.7	63.2	3.3	77.1	3.5	85.3	3.6	100.5	3.8	146.7	5.1
Taiwan	25.9	1.7	41.1	2.1	47.3	2.1	57.6	2.4	98.1	3.7	110.2	3.8
Brazil	35.0	2.3	45.1	2.3	66.3	3.0	67.4	2.8	68.6	2.6	83.1	2.9
Hong Kong	23.3	1.5	45.9	2.4	55.7	2.5	59.0	2.5	64.2	2.4	84.8	2.9
India	17.2	1.1	16.3	0.8	18.5	0.8	21.6	0.9	27.4	1.0	27.6	1.0
Sub-total	206.3	13.3	274.5	14.2	349.2	15.7	408.0	17.2	524.6	19.7	657.6	22.8
"OTHER" SOURCES	160.7	10.4	223.9	11.6	288.8	13.0	312.8	13.2	389.2	14.6	435.8	15.1
TOTAL ALL COUNTRIES	**1,545.9**	**100.0**	**1,928.2**	**100.0**	**2,221.1**	**100.0**	**2,376.6**	**100.0**	**2,663.1**	**100.0**	**2,876.5**	**100.0**

(1) Including floor coverings, hosiery and knitted fabrics.

SOURCE: Department of Regional Industrial Expansion, based on Statistics Canada data.

Table 24

CANADIAN IMPORTS OF CLOTHING(1) FROM MAJOR SOURCES, 1982 - 1987

Sources	1982		1983		1984		1985		1986		1987	
	Million dollars	Per cent	Million dollars	Per cent	Million dollars	Per cent	Million dollars	Per cent	Million dollars	Per cent	Million dollars	Per cent
INDUSTRIALIZED COUNTRIES												
Italy	32.1	3.3	37.4	3.1	62.3	3.9	84.7	5.1	133.6	6.5	136.5	6.0
United States	111.9	11.4	108.7	9.1	128.1	8.0	111.3	6.7	117.3	5.7	125.0	5.5
West Germany	12.3	1.2	16.1	1.3	28.4	1.8	46.8	2.8	70.2	3.4	64.0	2.8
France	27.0	2.7	32.5	2.7	45.5	2.8	57.6	3.4	67.4	3.3	57.4	2.5
United Kingdom	18.8	1.9	24.0	2.0	28.5	1.8	38.9	2.3	49.5	2.4	42.8	1.9
Japan	11.9	1.2	19.7	1.6	25.6	1.6	30.0	1.8	35.5	1.7	27.8	1.2
Sub-total	214.0	21.7	238.4	19.9	318.4	19.8	369.3	22.1	473.5	23.2	453.5	20.0
LOW-COST COUNTRIES												
Hong Kong	222.1	22.5	287.3	24.0	342.4	21.2	321.9	19.3	383.4	18.8	420.5	18.6
South Korea	192.0	19.5	218.7	18.3	286.8	17.8	271.3	16.2	314.8	15.4	382.0	16.9
Taiwan	155.9	15.8	204.4	17.1	247.7	15.4	244.5	14.6	298.2	14.6	288.7	12.8
China, P.R.	63.7	6.5	93.6	7.8	140.5	8.7	143.1	8.6	179.1	8.8	260.3	11.5
India	26.3	2.7	29.5	2.5	49.5	3.1	60.6	3.6	54.0	2.6	51.5	2.3
Thailand	6.1	0.6	10.4	0.9	27.0	1.7	27.7	1.7	36.7	1.8	36.4	1.6
Sub-total	666.1	67.6	843.9	70.6	1,093.9	67.9	1,069.1	64.0	1,266.2	62.0	1,439.4	63.7
"OTHER" SOURCES	105.1	10.7	113.6	9.5	199.0	12.3	234.2	14.0	301.6	14.8	368.4	16.3
TOTAL ALL COUNTRIES	**985.2**	**100.0**	**1,195.9**	**100.0**	**1,611.3**	**100.0**	**1,672.6**	**100.0**	**2,041.3**	**100.0**	**2,261.3**	**100.0**

(1) Including knitted garments.

SOURCE: Department of Regional Industrial Expansion, based on Statistics Canada data.

In the six categories of textiles only yarns showed a restraint level increase in accordance with the 1982-86 bilaterals. Two categories, fabrics and sheets & pillowcases, indicated significant increases, from 13.2 thousand tonnes in 1986 to 23.8 thousand tonnes in 1987 for fabrics and from 2.2 thousand tonnes in 1986 to 5.4 thousand tonnes in 1987 for sheets and pillowcases. Two other categories, towels and other household products, indicated decreases from 4.3 thousand tonnes in 1986 to 3.9 thousand tonnes in 1987 for towels, and from 1.1 thousand tonnes in 1986 to 0.64 thousand tonnes in 1987 for other household products. Finally, the miscellaneous textiles category, containing cordage, rope, twine and heavy coated fabrics (where coating represents more than 50 per cent by weight) disappeared since restraints on these products were removed in 1987 (Table 25).

The 21 per cent increase in 1987 in yarn imports did not result from either increased restraint levels or from restraint overshipments. 85 per cent of the increase originated from unrestrained countries such as the United States, the United Kingdom and Brazil. Unrestrained products from otherwise restrained countries represented 15 per cent of the increase while the growth of imports of restrained yarns represented a negligeable amount of 119 tonnes of a total increase of 24.3 thousand tonnes. As table 25 indicates, the utilization rate of restraints in yarns in 1987 was only 81.6 per cent, lower than during the two previous years. Yarn imports are restrained from only four countries and two of them, Malaysia and Singapore, play a minor role. Therefore, there is considerable flexibility for importing yarns and no shortage of any kind can be attributed to import restraints.

The significant increase in restraint levels for fabrics in 1987 was caused mainly by adding categories of products which were not restrained in the previous 1982-86 bilateral agreements, to the restraints. The most important new additions were made for China, 6,400 tonnes, Hong Kong, 3,400 tonnes, and Taiwan, 2,100 tonnes. Even if more specific product groups were under restraint than before, the degree of utilization of these restraints was moderate in 1987 only reaching 74.4 per cent. The restraints were manifestly large enough to accommodate the increased demand of Canadian importers of fabrics without creating unnecessary bottlenecks.

The other major increase in restraint levels occurred in 1987 in bedsheets and pillowcases. The 3,200 tonne increase was attributed to a 3,600 tonne new restraint negotiated with Brazil (1,100 tonnes) and Turkey (2,500 tonnes) and to the non renewal of a 400 tonne restraint which applied up to 1986 to Taiwan but which was only utilized

Table 25

RESTRAINT LEVELS AND UTILIZATION RATES, TEXTILE PRODUCTS 1984-1987

Metric tonnes

	1984			1985			1986			1987		
Products	Original restraint level	Permits issued against restraint	Restraint utili-zation rate (per cent)	Original restraint level	Permits issued against restraint	Restraint utili-zation rate (per cent)	Original restraint level	Permits issued against restraint	Restraint utili-zation rate (per cent)	Original restraint level	Permits issued against restraint	Restraint utili-zation rate (per cent)
Yarns	3,132	2,273	72.6	3,375	2,945	87.3	3,639	3,095	85.0	3,939	3,214	81.8
Fabrics	11,882	6,197	89.0	12,525	10,881	85.1	13,224	9,879	74.7	23,828	17,730	74.4
Sheets and pillowcases	1,890	998	52.8	1,990	838	42.1	2,213	1,052	47.5	5,378	3,731	89.4
Towels	2,527	2,213	87.8	2,887	2,098	78.1	4,280	3,515	82.5	3,894	3,509	90.1
Other household products	904	409	45.3	995	411	41.3	1,094	370	33.8	842	147	22.9
Misc. textiles: cordage, rope, twine; coated fabrics	2,740	789	28.8	2,991	1,025	34.3	3,287	1,179	36.1	-	-	-
TOTAL	**23,075**	**14,879**	**64.5**	**24,563**	**17,978**	**73.2**	**27,687**	**19,090**	**68.9**	**37,681**	**28,331**	**75.2**

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

at a 12 per cent rate in 1985 and 1986. These new restraints were used irregularly, from a high of 102 per cent for Brazil to a low of 15.3 per cent for Hong Kong, for an average of the four restrained countries (Hong Kong, China, Brazil and Turkey) of 69.4 per cent. Here again only a small number of countries were under restraint and the restraints were far from being utilized.

The decrease in total restraints for cotton terry towels originated from the reduction of Brazil's base level in 1987 by 435 tonnes and by the elimination of the 100 tonne restraint for India. At 90.1 per cent, the restraint utilization rate was the highest among the textile products.

Other household textile products have been and still are restrained from two countries only: South Korea and China. In the new agreements, that took effect in 1987, both countries agreed to a reduction in their respective restraint levels because, during the life of the previous agreements 1982-1986, their combined average utilization rate had remained below 40 per cent. Even the reduced 1987 levels were only used at a rate of 22.9 per cent. Manifestly, this category has been retained primarily for negotiating purposes.

There has been more continuity in the restraint levels for clothing. Some countries have experienced overall restraint losses because of the lifting of restraints on some poorly utilized product categories. This affected Czechoslovakia, Poland, Pakistan, the Philippines and a few others. On the other hand, a few countries benefitted from increases in their restraint entitlements. These increases came about not through genuine increases of some restricted product categories but through additions of new product categories in a certain number of bilateral agreements.

Restraint utilization rates by country have demonstrated that the four dominant low cost exporting countries tend to utilize their entitlements. In 1987 the utilization rates of the four big exporters ranged from a high of 99 per cent for Hong Kong to a low of 93 per cent for Taiwan. However, some of the smaller exporting countries also achieved relatively high utilization rates, namely Thailand (88 per cent), India (87 per cent), Pakistan (96 per cent) and Malaysia (86 per cent). Nevertheless, the overall restraint utilization rate was 89.6 per cent in 1987, the lowest since 1982. This result is mainly attributable to new countries which were given large enough quotas to accommodate their future performance potential but too large for 1987. Such was the case of Turkey (42 per cent), Brazil (26 per cent), the Maldives (14.5 per cent) and North Korea (17.2 per cent) (Table 26).

Table 26

RESTRAINT LEVELS AND UTILIZATION RATES BY COUNTRY, CLOTHING 1984-1987

Thousand units

Products	1984			1985			1986			1987		
	Original restraint level	Permits issued against restraint	Restraint utilization rate (per cent)	Original restraint level	Permits issued against restraint	Restraint utilization rate (per cent)	Original restraint level	Permits issued against restraint	Restraint utilization rate (per cent)	Original restraint level	Permits issued against restraint	Restraint utilization rate (per cent)
Hong Kong	39,893	38,728	97.0	40,754	41,860	102.7	42,268	43,353	102.6	46,137	45,685	99.0
Taiwan	40,151	40,087	99.8	41,284	41,434	100.4	42,450	41,717	98.3	40,033	37,230	93.0
China, P.R.	28,692	34,870	121.5	30,176	29,507	97.8	34,390	36,997	107.6	37,989	37,372	98.4
South Korea	32,465	32,439	100.0	33,318	33,362	100.1	34,203	33,710	98.6	35,555	33,919	95.4
Indonesia	1,150	1,172	101.9	2,220	1,905	85.8	8,529	6,345	74.4	8,606	6,907	80.3
India	6,596	6,590	100.0	6,992	6,957	99.5	6,777	5,791	85.5	8,486	7,376	86.9
Thailand	4,225	3,939	93.2	6,299	5,640	89.5	6,677	6,518	97.6	8,288	7,293	88.0
Philippines	8,304	6,786	81.7	8,830	6,432	72.8	9,393	6,099	64.9	8,112	6,436	79.3
Malaysia	3,211	3,266	101.7	4,655	3,060	65.7	5,532	4,496	81.3	5,909	5,081	86.0
Singapore	3,877	2,736	70.5	4,746	2,007	42.3	5,031	3,306	65.7	5,333	3,159	59.2
Romania	3,853	2,540	65.9	4,040	2,373	58.7	4,238	2,578	60.8	4,755	3,454	72.6
Pakistan	3,891	2,693	69.2	4,125	3,039	73.7	5,003	3,648	72.9	4,313	4,124	95.6
Bangladesh	-	-	-	474	333	70.3	2,195	1,966	89.6	3,723	3,030	81.4
Sri Lanka	1,619	1,467	90.6	2,393	1,909	79.8	2,536	1,799	70.9	3,555	3,063	86.2
Turkey	-	-	-	-	-	-	750	348	46.3	2,972	1,249	42.0
Brazil	-	-	-	855	578	67.6	2,507	430	17.1	2,728	709	26.0
Maldives	-	-	-	-	-	-	2,500	221	8.9	2,650	384	14.5
Macau	1,348	1,317	97.7	1,429	1,355	94.8	1,515	1,548	102.2	1,697	1,704	100.4
Poland	3,094	1,546	50.0	3,251	1,056	32.5	3,415	1,629	47.7	1,647	1,295	78.6
Mauritius	202	102	50.5	417	407	97.6	1,150	1,060	92.2	1,199	913	76.2
Vietnam	-	-	-	-	-	-	700	320	45.7	1,050	1,262	120.2
Bulgaria	831	453	54.5	852	564	66.2	893	420	47.0	1,015	440	43.4
North Korea	-	-	-	-	-	-	260	79	30.4	1,000	172	17.2
Czechoslovakia	492	177	36.0	520	71	13.7	550	101	18.4	297	102	34.4
Hungary	42	14	32.0	44	11	25.0	45	19	43.0	46	47	100.5
TOTAL	**183,937**	**180,921**	**98.4**	**197,874**	**183,861**	**93.0**	**223,508**	**204,499**	**91.5**	**237,094**	**212,407**	**89.6**

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

High rates of utilization by country also indicate that there may have been quota shortages on a number of products originating from Hong Kong, Macau, China, South Korea and probably Thailand, with increased quota charges a probable result.

Restraint utilization rates by product in 1987 demonstrate that there was less strain on imports than during the previous years. There was no 100 per cent and over utilization rate of the original restraint levels in 1987 as was the case in previous years. Sweaters, pullovers and cardigans reached 99.8 per cent because of fashion trends, but the demand in this category had subsided by the end of 1987 leaving retailers with abundant inventories on their hands (Table 27). Another high utilization rate was achieved in the non specific clothing category. A high rate of utilization of this particular category has been the rule over the past years because it contains clothing aggregates without determined sublimits for India and Macau and because it is easier to fully use an aggregate with no constraints on particular products.

Some other high utilization rates were realized in tailored collar shirts, in pants, shorts and overalls and in outerwear. The lowest utilization rates occurred in fine suits and sportcoats (72.1 per cent) and in coats, jackets and rainwear (64.0 per cent).

Among the special textile products, the restraint for work gloves was used at a 87.4 per cent rate in 1987, down from 90 per cent the previous year (Table 28). However, with over 38 million pairs, the restraint is huge. South Korea, China, Macao and Pakistan all used their quotas at rates above 95 per cent; only Hong Kong, Sri Lanka and Thailand registered utilization rates of 85 per cent or less.

As for hosiery, the average utilization rate by the five countries under restraint reached 84.3 per cent, considerably less than the 90 per cent and more in previous years. The main exporting country, South Korea, which represents about half of all quotas negotiated, performed at 101 per cent of its entitlement in terms of original restraint level in 1987. However, China used two thirds of its restraint and Singapore made symbolic exports of less than half of one per cent of its restraint.

Imports of textile handbags have been and still are restrained from only two sources: South Korea and Taiwan. At over seven million units, the restraint is so large that the utilization rate in 1987 did not reach 30 per cent, considerably less than the 60 per cent rate attained in the previous years. At a 29 per cent utilization rate, restraints on textile handbags are more symbolic than real.

Table 27

RESTRAINT LEVELS AND UTILIZATION RATES BY PRODUCT, CLOTHING
1984-1987
Thousand units

Products	1984			1985			1986			1987		
	Original restraint level	Permits issued against restraint	Restraint utili-zation rate (per cent)	Original restraint level	Permits issued against restraint	Restraint utili-zation rate (per cent)	Original restraint level	Permits issued against restraint	Restraint utili-zation rate (per cent)	Original restraint level	Permits issued against restraint	Restraint utili-zation rate (per cent)
1. Outerwear	3,213	3,258	101.4	3,394	3,253	95.8	3,617	3,396	93.9	3,987	3,666	91.9
2. Pants, shorts, overalls, coveralls	25,101	24,660	98.2	25,320	24.191	95.5	28,293	28,279	100.0	31,522	29,232	92.7
3. Shirts, tailored collar, men's and boys'	15,947	15,997	100.3	16,629	16,706	100.5	19,302	19,348	100.2	22,425	21,375	95.3
4. Blouses, shirts, T-shirts and sweatshirts	55,420	54,161	97.7	60,556	54,641	90.2	67,055	60,608	90.4	67,374	59,673	88.6
5. Sweaters, pullovers and cardigans	26,146	23,749	90.8	27,472	26,148	95.2	29,173	29,232	100.2	31,675	31,612	99.8
6. Sleepwear	5,377	5,540	103.0	5,629	5,455	96.9	6,558	5,700	86.9	6,864	5,541	80.7
7. Dresses, skirts, coordinates	15,842	15,366	97.0	17,577	15,118	86.0	21,578	19,515	90.4	23,001	20,200	87.8
8. Underwear	12,192	12,866	105.5	14,641	13,740	93.8	16,548	15,475	93.5	18,389	15,061	81.9
9. Swimwear, foundation garments	6,190	7,903	127.7	6,514	6,454	99.1	9,506	7,013	73.8	8,782	7,853	89.4
10. Coats, jackets rainwear	8,882	7,594	85.5	9,701	7,999	82.5	11,244	7,837	69.7	12,702	8,133	64.0
11. Fine Suits, sports coats	562	368	65.5	575	420	73.0	604	545	90.1	750	541	72.1
12. Non-specific(1)	9,064	9,459	104.4	9,666	9,735	100.7	9,769	7,552	77.3	9,622	9,520	98.9
TOTAL	**183,937**	**180,921**	**98.4**	**197,674**	**183,861**	**93.0**	**223,508**	**204,499**	**91.5**	**237,094**	**212,407**	**89.6**

(1) Non-specific: Includes clothing aggregates from India and Macau, and children's clothing imports from the Philippines.

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

Table 28

RESTRAINT LEVELS AND UTILIZATION RATES, WORK GLOVES, HANDBAGS AND HOSIERY 1984-1987

Thousand units

	1984			1985			1986			1987		
Products	Original restraint level	Permits issued against restraint	Restraint utili-zation rate (per cent)	Original restraint level	Permits issued against restraint	Restraint utili-zation rate (per cent)	Original restraint level	Permits issued against restraint	Restraint utili-zation rate (per cent)	Original restraint level	Permits issued against restraint	Restraint utili-zation rate (per cent)
Work gloves	31,212	29,137	93.4	32,964	30,531	92.6	34,815	31,988	91.9	38,215	33,395	87.4
Handbags, textile	4,742	3,366	71.0	5,027	3,074	61.2	5,329	2,972	55.8	7,038	2,056	29.2
Hosiery	16,156	14,935	92.4	17,571	15,794	89.9	18,450	16,737	90.7	21,329	17,978	84.3
TOTAL	**52,110**	**47,438**	**91.0**	**55,562**	**49,339**	**88.8**	**58,594**	**51,697**	**88.2**	**66,582**	**53,429**	**80.2**

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

d) Imports of Broadwoven Fabrics and Clothing by Category of Importers

There have always been thousands of importers of fabrics and clothing in Canada. Some of them import considerable quantities, others only marginal volumes to satisfy the variety of needs in the marketplace. As imports have grown regularly since 1982, so have the number of importers.

In 1987 there were 2,293 importers of broadwoven fabrics into Canada, up from 1,878 in 1984. Over one third of them were clothing manufacturers. Over a quarter were importer/wholesalers, importing fabrics for resale. Over a fifth were manufacturers of curtains, draperies, bedding, linens, upholsterers, makers of furniture and interior decorators. Finally, there were a small number of buyers of greige fabrics for dyeing and finishing who imported considerable quantities of fabric (fabric manufacturers and converters).

In terms of quantity, importer/wholesalers did most of the importing (43.3 per cent) in 1987, as during the previous years. They were followed, in decreasing order, by clothing manufacturers, fabric manufacturers, furnishing manufacturers and converters (Table 29).

Table 29

RELATIVE SHARES OF BROADWOVEN FABRIC[1] IMPORTS BY CATEGORY OF IMPORTERS, 1984-1987, BASED ON VOLUME IMPORTED

Per Cent

Category of Importers	1984	1985	1986	1987
Clothing manufacturers	34.4	36.2	32.7	30.4
Importers/wholesalers	44.1	42.0	39.2	43.3
Furnishing manufacturers	9.4	7.5	8.2	8.4
Fabric manufacturers	5.9	8.3	12.7	10.2
Converters	6.2	6.0	7.2	7.7

(1) Includes cotton, polyester/cotton, wool, man-made broadwoven fabrics.

SOURCE: Appendix Table A-13, excluding non-definable categories.

In terms of value of imports, clothing manufacturers were as important as importer/ wholesalers in 1987, both groups importing 39.9 per cent of all imported broadwoven fabrics. Furnishing manufacturers followed with 9.7 per cent, fabric manufacturers with 6.4 per cent, and converters with 5.3 per cent (Table 30).

Table 30

RELATIVE SHARES OF BROADWOVEN FABRIC(1) IMPORTS BY CATEGORY OF IMPORTERS, 1984-1987, BASED ON VALUE IMPORTED

Per Cent

Category of Importers	1984	1985	1986	1987
Clothing manufacturers	42.3	45.0	43.2	39.3
Importers/wholesalers	39.7	36.8	35.1	39.3
Furnishing manufacturers	9.6	8.9	9.4	9.7
Fabric manufacturers	4.2	5.4	7.8	6.4
Converters	4.2	3.9	4.5	5.3
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**

(1) Includes cotton, polyester/cotton, wool, man-made broadwoven fabrics.

SOURCE: Appendix Table A-13, excluding non-definable categories.

Throughout the period the highest average price per pound for imported fabrics was paid by clothing and furnishing manufacturers. The lowest average price per pound was paid by the fabric manufacturers and converters since fabric manufacturers often, and converters always, import greige fabrics and increase their value through dyeing and finishing (Table 31).

Table 31

AVERAGE VALUE PER POUND OF BROADWOVEN FABRIC(1) IMPORTS BY CATEGORY OF IMPORTERS, 1984-1987

Dollars

Category of Importers	1984	1985	1986	1987
Clothing manufacturers	5.49	5.40	6.26	5.81
Importers/wholesalers	4.04	3.80	4.23	4.09
Furnishing manufacturers	4.60	5.15	5.44	5.21
Fabric manufacturers	3.19	2.79	2.92	2.83
Converters	3.00	2.76	2.97	3.09

(1) Includes cotton, polyester/cotton, wool, man-made broadwoven fabrics.

SOURCE: Appendix Table A-13, excluding non-definable categories.

In 1987, the number of clothing importers grew to 2,335 from 2,157 in 1986. Half of the additional importers were in the category of importers/wholesalers.

The relative shares of the three main categories of importers, based on the volume of units imported, have remained fairly stable over the 1980-87 period. Importers/wholesalers have represented about 60 per cent of clothing imports, retailers approximately 16-17 per cent and clothing manufacturers around 23 to 24 per cent (Table 32).

Table 32

RELATIVE SHARES OF CLOTHING IMPORTS BY CATEGORY OF IMPORTERS, 1978-1987 BASED ON UNITS IMPORTED
Per cent

Category of Importers	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987
Importers/wholesalers	67.6	65.0	62.1	59.1	59.6	58.2	60.0	57.6	60.7	60.1
Retail stores	13.8	15.3	16.9	19.4	16.8	16.5	17.2	18.2	17.3	16.5
Clothing manufacturers	18.6	19.7	21.0	21.5	23.6	25.3	22.8	24.2	22.0	23.4
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

SOURCE: Appendix Table A-14.

Based on the value of imports, instead of units, the shares by category of importers also remained relatively stable throughout 1980-1987. In 1987, importers/wholesalers continued to dominate the import scene, with 55 per cent of the total. Clothing manufacturers imported 23 per cent of the total, about the same as in volume, with retail stores importing about 22 per cent, significantly above their 16.5 per cent share of volume. Over the last ten years retail stores have been consistently importing high unit value clothing (Tables 33 and 34).

Table 33

RELATIVE SHARES OF CLOTHING IMPORTS BY CATEGORY OF IMPORTERS, 1978-1987 BASED ON VALUE OF IMPORTS
Per Cent

Category of Importers	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987
Importers/wholesalers	60.3	57.6	52.0	50.0	51.2	51.6	53.3	52.6	57.2	55.0
Retail stores	18.8	19.6	23.0	24.7	21.1	21.3	23.0	23.8	22.8	21.9
Clothing manufacturers	20.9	22.8	25.0	25.3	27.7	27.1	23.7	23.6	20.0	23.1
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

SOURCE: Appendix Table A-15.

Table 34

WEIGHTED AVERAGE UNIT VALUE OF IMPORTS BY CATEGORY OF IMPORTERS, 1978-1987
Dollars

Category of Importers	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987
Importers/wholesalers	2.86	3.43	3.73	3.95	4.21	4.37	5.01	5.12	5.79	6.80
Retailers	4.37	4.98	6.07	5.94	6.12	6.38	7.53	7.33	8.38	9.14
Clothing manufacturers	3.60	4.48	5.30	5.46	5.73	5.27	5.87	5.46	5.97	6.30

SOURCE: Appendix Table A-16.

e) Per Capita Value of Textile and Clothing Imports From Low-Cost Countries

The ranking of developed countries by the per capita value of textile and clothing imports from low-cost countries, did not change significantly in 1987 compared to the previous year. This ranking is determined by the degree of openness of any developed country to such imports, a relatively stable factor, and by the level of exchange rates, a more volatile factor. As exchange rates remained relatively stable in 1987 compared to exchange rates of the previous year, no major changes in ranking could have been expected.

With the relatively low value of the Canadian dollar in 1986 and 1987, Canada ranked seventh in terms of per capita value of textile and clothing imports, among the developed countries. With a relatively high value of the Canadian dollar in 1984 and 1985 Canada temporarily ranked fifth (Table 35).

This ranking is due to the fact that Canada has a higher per capita value of imports of primary textile products from low-cost countries than the majority of other developed countries. In this regard Canada ranked second in 1987, behind Belgium-Luxemburg.

Comparing the Canadian and U.S. performances Table 35 indicates that the U.S. was consistently ahead of Canada in overall per capita imports of clothing. In per capita imports of clothing the U.S. was 50 per cent above Canada but its per capita imports of primary textile products were about half the Canadian per capita imports. Manifestly, the U.S. was more open than Canada for clothing but more restrictive for primary textile products. This reflects the history of the textile trade of the two countries: the U.S. have never been a major importer of primary textiles while Canada has always imported a significant proportion

Table 35

PER CAPITA VALUE (US DOLLARS) OF TEXTILE AND CLOTHING IMPORTS BY HIGHLY DEVELOPED COUNTRIES FROM LOW-COST COUNTRIES, 1978-1987

Rank-order 1987

Primary Textile Products

Country	1978	1981	1982	1983	1984	1985	1986	1987
1. West Germany	8.29	10.60	9.97	10.76	12.29	12.54	15.92	19.94
2. Switzerland	5.39	10.26	6.53	6.49	8.85	10.23	12.03	13.07
3. Denmark	11.88	13.55	12.38	13.48	14.76	15.42	18.31	22.13
4. Netherlands	10.41	12.22	14.15	12.03	11.11	13.33	15.48	17.92
5. Sweden	9.14	11.66	10.33	9.63	10.33	10.06	11.91	16.47
6. United States	4.12	8.06	5.31	6.20	8.53	6.73	10.46	12.41
7. Canada	7.25	10.80	8.74	11.81	13.88	14.61	18.20	24.29
(Rank)	(11)	(9)	(9)	(7)	(5)	(5)	(4)	(2)
8. Australia	21.26	29.89	29.54	28.07	33.58	28.49	32.06	42.90
9. Norway	5.87	9.56	8.27	8.78	6.64	6.80	10.26	12.31
10. Belgium-Luxembourg	11.72	16.42	19.64	20.69	21.95	22.76	27.19	30.77
11. New Zealand	35.44	41.78	44.04	38.59	48.40	41.38	43.13	53.42
12. Austria	7.22	9.85	8.86	9.24	11.29	10.27	13.39	16.54
13. United Kingdom	7.80	8.08	7.74	7.90	8.56	9.15	10.82	16.79
14. Finland	5.96	11.82	12.12	12.49	11.43	12.54	13.52	18.00
15. France	5.03	6.82	7.46	6.53	6.90	7.75	10.03	12.57
16. Japan	8.69	8.63	8.71	7.98	11.24	10.70	10.64	14.89
17. Ireland	7.31	8.53	8.47	8.49	9.21	10.15	12.35	15.34
18. Italy	4.88	6.00	6.47	8.03	8.74	9.35	13.01	18.24

Clothing

Country	1978	1981	1982	1983	1984	1985	1986	1987
1. West Germany	32.53	47.38	44.90	45.48	49.76	48.41	84.96	121.35
2. Switzerland	27.43	40.37	40.58	41.42	48.87	48.54	65.59	95.64
3. Denmark	23.03	29.04	30.73	29.18	32.43	35.39	55.16	74.95
4. Netherlands	34.89	41.05	36.64	36.37	36.54	36.28	57.67	77.75
5. Sweden	28.42	39.04	33.03	33.03	35.12	37.23	53.11	77.32
6. United States	22.65	30.17	32.63	37.74	50.15	54.34	63.22	75.81
7. Canada	16.25	24.85	24.86	30.71	38.59	35.96	41.95	49.68
(Rank)	(8)	(8)	(7)	(6)	(4)	(6)	(7)	(8)
8. Australia	16.23	21.07	20.89	15.95	19.97	16.13	18.57	22.77
9. Norway	17.51	21.91	21.06	19.35	22.06	23.63	39.51	52.22
10. Belgium-Luxembourg	11.36	17.14	14.60	13.60	13.42	12.80	21.67	33.64
11. New Zealand	0.74	3.64	5.90	5.41	5.91	8.01	7.30	9.90
12. Austria	9.59	15.72	15.93	16.64	18.33	16.63	25.72	42.23
13. United Kingdom	15.35	24.91	22.43	19.25	22.44	20.73	28.15	39.70
14. Finland	5.74	14.00	14.05	12.05	11.32	13.33	20.67	37.95
15. France	7.07	14.19	14.72	13.61	13.90	16.44	28.23	40.41
16. Japan	7.13	9.96	10.11	7.95	10.97	11.78	16.73	28.07
17. Ireland	3.00	8.00	8.25	9.20	9.74	10.68	16.47	22.02
18. Italy	1.91	4.71	4.21	3.83	3.88	4.44	7.11	11.52

Total

Country	1978	1981	1982	1983	1984	1985	1986	1987
1. West Germany	40.82	66.26	54.87	56.26	62.05	60.94	100.88	141.29
2. Switzerland	32.82	50.63	49.11	49.91	57.72	58.76	77.62	108.71
3. Denmark	34.91	42.65	43.12	42.66	47.19	50.82	73.49	97.08
4. Netherlands	45.30	53.26	52.79	46.40	47.85	49.61	73.16	95.67
5. Sweden	37.56	50.69	49.26	42.86	48.45	47.29	65.02	93.79
6. United States	26.77	38.22	37.94	43.93	58.69	63.06	73.68	88.22
7. Canada	23.50	35.65	33.60	42.52	52.47	50.57	60.15	73.97
(Rank)	(9)	(9)	(10)	(7)	(5)	(5)	(7)	(7)
8. Australia	37.49	50.96	50.43	42.03	53.54	48.63	50.83	85.87
9. Norway	23.38	31.47	29.32	28.13	28.71	30.43	49.79	64.53
10. Belgium-Luxembourg	23.08	35.56	34.64	34.29	35.38	35.55	48.86	64.41
11. New Zealand	36.18	45.80	49.94	41.99	54.31	47.39	50.39	63.31
12. Austria	16.80	25.38	24.79	25.88	29.61	27.10	39.11	60.77
13. United Kingdom	22.95	32.99	30.18	27.15	31.00	29.89	38.77	56.49
14. Finland	11.70	25.62	26.18	24.54	22.75	25.87	34.19	55.95
15. France	12.10	21.02	22.18	20.14	20.88	24.19	36.26	52.96
16. Japan	15.82	18.81	18.82	15.93	22.21	22.49	27.57	42.96
17. Ireland	10.31	14.54	14.73	17.69	18.95	20.83	28.82	37.36
18. Italy	8.77	12.71	12.68	11.66	12.42	13.79	20.12	29.76

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

of its primary textile needs. Over the last ten years, Canada has been switching the countries of origin of such imports: instead of importing from developed countries, Canada has imported progressively higher volumes from low-cost countries.

9. APPARENT MARKETS FOR TEXTILE AND CLOTHING PRODUCTS

Since 1984, the Canadian manufacturers of clothing have been maintaining their share of the domestic clothing market, in terms of volume. With imports increasing at a slower rate than during the 1982-1984 period, domestic shipments have kept pace with the increases in the apparent market for clothing. At the same time, export shipments have doubled.

The apparent market for clothing, in terms of volume, is estimated to have increased by 2 per cent in 1987 over 1986 (Table 36). Total shipments of domestic producers have increased by 3 per cent and domestic shipments by 2 per cent, while imports have risen by 3 per cent. This represented a more modest increase than in the preceeding year. In fact the revised 1986 data showed that the apparent market, total shipments and domestic shipments have all increased by 7 per cent over 1985, and that imports have increased by 8 per cent.

A partial explanation for the general slow-down in clothing in 1987 can be found in the women's apparel sector. After fuelling a large part of the growth in the clothing market in 1986, the women's apparel sector experienced a significant slowdown in the second half of 1987. Following a 23 per cent increase in 1986, the apparent market for women's sportswear, dresses and skirts is estimated to have decreased by 4 per cent in 1987. The apparent market for women's blouses and shirts followed a 13 per cent increase in 1986 with an estimated 9 per cent decrease in 1987.

Other clothing categories such as structured suits and jackets, athletic suits or sets, sweaters, and men's tailored collar shirts also contributed to the slower 1987 performances.

On the other hand four clothing categories seem to have done particularly well in 1987, with strong increases in their respective apparent markets. The apparent market for winter outerwear is estimated to have increased by 10 per cent after an 11 per cent downturn in 1986. The apparent market for pants, shorts, overalls and coveralls topped its 8 per cent increase in 1986 with an estimated 10 per cent increase

Table 36

VARIATIONS IN APPARENT MARKETS, DOMESTIC SHIPMENTS(1) AND IMPORTS OF CLOTHING, 1985-1986 AND 1986-1987
(Based on units)
Per cent

	Apparent Markets		Domestic Shipments		Total Imports		Imports from Low-Cost sources	
Clothing Category	**86/85**	**87/86**	**86/85**	**87/86**	**86/85**	**87/86**	**86/85**	**87/86**
Underwear	2	1	3	2	−2	−3	−6	16
Foundation garments	4	4	−2	2	30	10	54	11
Structured suits and jackets	9	−3	neg	−3	42	−6	40	−2
Leather coats and jackets	−28	8	−8	2	−56	26	−60	32
Pyjamas and sleepwear	−9	−3	−12	6	−1	2	−4	3
Children's and infants' wear	3	1	8	1	−6	1	−5	−2
Winter outerwear	−11	10	−20	22	8	−9	13	−10
Other men's shirts	19	11	21	6	16	22	18	22
Pants, shorts, overalls, coveralls	8	10	2	13	20	4	22	6
Athletic suits or sets	19	−6	29	−11	5	2	5	3
Womens' sportswear, dresses and skirts	23	−4	24	−14	22	13	23	18
T-shirts and sweatshirts	12	10	21	6	4	14	2	13
Swimwear	−6	−12	−3	−20	−9	−4	−5	−2
Women's blouses and shirts	13	−9	24	9	8	−17	10	−17
Rainwear, textile	3	40	5	−26	−3	198	−5	209
Jackets, overcoats and topcoats	1	9	9	14	−2	6	−3	8
Sweaters	14	1	11	−5	16	3	16	5
Men's tailored collar shirts	8	−1	neg	−4	12	neg	9	−2
Total of all clothing categories	**7**	**2**	**7**	**2**	**8**	**3**	**8**	**5**

neg – negligible.

(1) Revised domestic shipments for 1986 and estimates of domestic shipments for 1987.

SOURCE: Textile and Clothing Board.

in 1987. The apparent market for t-shirts and sweatshirts almost matched a 1986 increase of 12 per cent with an estimated increase of 10 per cent in 1987. Finally, the apparent market for jackets, overcoats and topcoats followed a 1 per cent increase in 1986 with an estimated 9 per cent increase in 1987.

The increases in the apparent markets of these four categories in 1987 were mostly to the advantage of the Canadian manufacturers. The domestic shipments in three of these four sectors increased at a faster rate than did imports. The only exception was the t-shirts and sweat-shirts category where domestic shipments increased by 6 per cent while imports increased by 14 per cent. With an estimated increase of 22 per cent, domestic shipments of winter outerwear have benefitted from the winter olympic games held in Calgary early in 1988.

The share of domestic producers in the apparent Canadian market for clothing, in units of apparel, has remained relatively stable since 1984. Based on estimates of domestic shipments for 1987, the market share held by Canadian manufacturers has decreased from 59 per cent in 1984 to 58 per cent in 1987 (Table 37 and Appendix Table A-18). In contrast, from 1981 to 1984, these same manufacturers experienced a substantial drop from 69 per cent to 59 per cent in market share.

Canadian manufacturers in four clothing categories did not fare as well as the rest of the manufacturers in maintaining their market share. In foundation garments, the share of the apparent market held by domestic shipments decreased from 84 per cent in 1984 to 75 per cent in 1987. The domestic market share in pyjamas and sleepwear fell from 76 per cent in 1984 to 70 per cent in 1987. Domestic shipments of structured suits and jackets lost 5 percentage points in market share, from 79 per cent in 1984 to an estimated 74 per cent in 1987. Finally, domestic shipments of textile rainwear lost 20 percentage points in market share, from 57 per cent in 1984 to 37 per cent in 1987. Incidentally, imports of textile rainwear rose by 198 per cent in 1987 over 1986 (Table 36).

In terms of value, the share of the apparent Canadian market for clothing held by domestic manufacturers stood at 70 per cent in 1987 (Table 38). This represented a decrease in market share of 2 percentage points since 1984 as opposed to a loss of 9 percentage points in market share between 1981 and 1984 (Appendix Table A-19). In 1987, domestic shipments in current dollars have increased by 4 per cent while the f.o.b. value of imports, in current dollars, increased by 11 per cent due to the weakness of the exchange rate and, probably also, to some trading up in the value of imported products.

Table 37

SHARES(1) OF APPARENT MARKETS FOR CLOTHING HELD BY DOMESTIC SHIPMENTS(2) AND IMPORTS, 1983-1987

(Based on units)
Per cent

Clothing Category	Domestic Shipments					Total Imports				
	1983	1984	1985	1986	1987	1983	1984	1985	1986	1987
Underwear	84	82	79	80	81	16	18	21	20	19
Foundation garments	86	84	81	77	75	14	16	19	23	25
Structured suits and jackets	85	79	79	73	74	15	21	21	27	26
Leather coats and jackets	66	47	58	74	70	34	53	42	26	30
Pyjamas and sleepwear	78	76	74	71	70	22	24	26	29	30
Children's and infants' wear	68	65	65	68	68	32	35	35	32	32
Winter outerwear	64	68	68	61	68	36	32	32	39	32
Other men's shirts	69	63	68	69	66	31	37	32	31	34
Pants, shorts, overalls, coveralls	64	63	66	62	64	36	37	34	38	36
Athletic suits or sets	60	56	58	62	59	40	44	42	38	41
Womens' sportswear, dresses and skirts	67	58	62	62	55	33	42	38	38	45
T-shirts and sweatshirts	44	41	45	48	46	56	59	55	52	54
Swimwear	52	46	48	50	45	48	54	52	50	55
Women's blouses and shirts	39	37	30	33	39	61	63	70	67	61
Rainwear, textile	64	57	69	71	37	36	43	31	29	63
Jackets, overcoats and topcoats	37	30	29	31	33	63	70	71	69	67
Sweaters	31	31	32	31	30	69	69	68	69	70
Men's tailored collar shirts	44	37	33	30	30	56	63	67	70	70
Total of all clothing categories	**62**	**59**	**59**	**58**	**58**	**38**	**41**	**41**	**42**	**42**

(1) In descending order of market share held by domestic shipments.
(2) Domestic shipments estimated for 1987.

SOURCE: Textile and Clothing Board.

The 1987 Canadian apparent markets for primary textiles and textile products have been difficult to evaluate. Due to confidentiality constraints, it has become impossible for the Textile and Clothing Board to publish any market information on specific categories of yarns, fabrics and other textile products. In 1987 the Board received market information from the Department of Regional Industrial Expansion on only one publishable fabric category, broadwoven fabrics.

The apparent market for broadwoven fabrics, in terms of volume, increased by 8 per cent in 1987. While imports increased by 11 per cent, domestic shipments increased by only 3 per cent. However, total shipments by Canadian manufactures were up by 9 per cent and exports by 54 per cent. The market share held by Canadian manufacturers of broadwoven fabrics now stands at 35 per cent, a decrease of 14 percentage points since 1982 (Table 39).

Table 38

SHARES OF THE APPARENT MARKET FOR CLOTHING HELD BY DOMESTIC SHIPMENTS AND BY IMPORTS, 1980, 1983-1987

(Based on value and units)
Per cent

	1980	1983	1984	1985	1986	1987(1)	1980	1983	1984	1985	1986	1987(1)
In terms of value of clothing	83	77	72	73	71	70	17	23	28	27	29	30
In terms of units of clothing	73	62	59	59	58	58	27	38	41	41	42	42

(1) Based on estimates of net domestic shipments for 1987.

SOURCE: Appendix Tables A-18 and A-19.

10. FINAL DEMAND FOR TEXTILES AND CLOTHING

After an increase of 8 per cent in 1985 and 5 per cent in 1986, the personal disposable income of Canadians grew by a healthy 6.9 per cent in 1987. For a third year the growth in overall consumer spending has outpaced the growth in personal disposable income. In the years 1985-87, total consumer spending progressed by 9.3, 8.1 and 8.6 per cent. The difference between the two sets of growth rates was filled by a steady reduction in personal savings.

Among the consumer spending categories furnishings and clothing are important for textiles and clothing. A third category, transportation and communication, contains elements of textiles in upholstery and floor covering in new transportation vehicles, mainly automobiles. However, when compared to the wide scope of the transportation and communication expenditures, the value of these textile inputs is very low.

Spending on furnishings which include household textiles such as bedding, towels, curtains, drapes, carpets and upholstery grew significantly over the last three years and was a major contributing factor to the strong demand for textiles. In current dollars, the increase was 8.7, 10.7 and 10.8 per cent for the years 1985, 1986 and 1987. In constant dollars, it was 6.1, 6.9 and again 6.9 per cent.

Table 39

APPARENT CANADIAN MARKET, BROADWOVEN FABRICS(1) 1982 - 1987

	1982	1983	1984	1985	1986	1987
			— Thousand of square metres —			
Total Shipments	317,567	343,022	332,698	338,733	315,122	343,843
Less Exports	46,794	33,080	33,289	35,291	36,143	55,793
Domestic Shipments	270,773	309,942	299,409	303,442	278,979	288,050
Imports	283,516	356,133	410,506	462,946	485,530	539,971
Apparent Canadian Market	554,289	666,075	709,915	766,388	764,509	828,021
Share of market held by:			— Per cent —			
Domestic Shipments	49	47	42	40	37	35
Imports	51	53	58	60	63	65

SOURCE: Department of Regional Industrial Expansion.

(1) Excludes coated fabrics.

Spending on clothing did also well in 1985 and 1986 but slowed down in 1987. For the last three years spending grew by 9.9, 8.7 and 7.4 per cent in current dollars and by 5.2, 5.4 and 3.2 per cent in constant dollars. This slow down in 1987 reestablished the long term trend of a decreasing relative share of spending on clothing, in the total consumer spending pattern. The 1985-86 reversal, with its growing share of spending on clothing, was a temporary phenomenon (Table 40).

Table 40

RELATIVE SHARE OF CLOTHING EXPENDITURES IN TOTAL CONSUMER EXPENDITURES ON GOODS AND SERVICES, 1981-1987
Per Cent

	1981	1982	1983	1984	1985	1986	1987
Expenditure in current dollars	5.50	5.23	5.13	5.14	5.17	5.20	5.14
Expenditure in constant (1981) dollars	5.50	5.41	5.41	5.48	5.53	5.61	5.53

SOURCE: Appendix Tables A-20 and A-21.

Retail sales of clothing reflect the development of consumer spending on clothing. Sales of clothing in constant dollars grew by 7.8 per cent in 1985, 6.5 per cent in 1986 but only by 2.1 per cent in 1987. The slight difference in rates of growth of consumer spending on clothing and of the retail trade in clothing originates from differences in definitions. Consumer spending on clothing includes clothing accessories and maintenance services which are not part of retail sales of clothing. On the other hand, data on retail sales of clothing are gathered only in department stores and stores specialized in clothing, thereby excluding sales of clothing by stores whose main activity is in other goods than clothing: general stores, sporting goods stores, drugstores and other types of stores where clothing sales are secondary.

As for the distribution of clothing sales by type of store, specialized chain stores continued to increase their market share at the expense of department stores and independent stores. It was in 1987 that the clothing sales by specialized chain stores exceed the sales of clothing by department stores for the first time (Table 41).

From 1981 to 1987, the relative market share of clothing sales by department stores fell by 4.3 percentage points while independent stores fell 7.0 percentage points. Chain stores increased their share in total clothing sales by 11.3 percentage points.

Table 41

DISTRIBUTION OF CLOTHING SALES, BY TYPE OF STORE, 1981-1988 1st Quarter
Per Cent

	1981	1982	1983	1984	1985	1986	1987	1988 1st Quarter
Department stores	41.9	41.9	40.2	39.9	38.8	38.6	37.6	35.2
Specialized stores:								
– chain	29.8	31.0	35.1	36.9	38.5	39.4	41.1	41.6
– independent	28.3	27.1	24.7	23.2	22.7	22.0	21.3	23.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

SOURCE: Appendix Table A-22.

The reasons for this development have been mentioned in previous reports. Chain stores specializing in clothing sales provide the consumer with a wide range of choices at a given price point. The other two types of stores are less specialized: they cover a larger spread of price points, but with a more limited choice at each price point.

Specialized by price points, chain stores of clothing can achieve low inventory/sales ratios and therefore minimize their financial costs. Department stores, on the other hand, because of their large price spread, operate with inventory/sales ratios two and half times higher than those of the chain stores (Table 42).

Table 42

RATIO OF AVERAGE MONTHLY INVENTORIES TO AVERAGE MONTHLY SALES, BY TYPE OF STORE, 1981-1988 1st Quarter

Type of Store	1981	1982	1983	1984	1985	1986	1987	1988 1st Quarter
Department stores	3.30	3.30	3.28	3.41	3.42	4.10	4.18	5.40
Specialized stores:								
– chain	1.96	2.12	1.86	1.76	1.61	1.61	1.65	2.04
– independent	3.17	3.03	2.83	3.29	3.08	n/a	n/a	n/a
All stores	2.81	2.82	2.66	2.82	2.70	2.86*	2.92*	3.72*

n/a Not available.

* Statistics Canada no longer publishes estimates of inventory for independent stores. Thus, the total figure for 1986 and onwards reflects only the other two types of stores.

SOURCE: Appendix table A-22 and Statistics Canada, CANSIM Matrices 112 and 194.

The table also indicates that since 1986 department store inventory turnover has slowed down, and, since 1987, inventory turnover has slowed down for chain stores. Lower than anticipated sales was the main reason for such a slow-down.

11. CONCLUSIONS

1987 was a strong year for the Canadian textile industry. Output, employment, capacity utilization, investment and profits gained. Gains in the clothing industry were more modest: the clothing industry had a good first half of 1987 but experienced a slow-down of consumer demand for clothing during the second half of the year. Uncertainties about the direction of fashion, some outright reversals in fashion trends and an acceleration in the rise of retail prices for clothing, contributed to reducing the consumer willingness to continue to spend freely on clothing.

The slow-down in the consumer demand for clothing was accompanied by a slow-down in imports of clothing. Therefore, the share of the apparent market for clothing held by Canadian manufacturers remained relatively stable at 58 per cent in terms of units and at 70 per cent in value terms.

Preliminary results for the first six months of 1988 have confirmed a slow-down in both textiles and clothing. As in the latter part of 1987, the pressure exercised by this slow-down on the domestic clothing manufacturers has been mitigated by a slow-down in imports. Nevertheless, 1988 may turn out to be a less prosperous year for the Canadian textile and clothing manufacturers.

The longer term future of these two industries will contain two major challenges. The first will require an efficient and successful adjustment to the new U.S.-Canada trading environment of the next ten years. The second will be to adapt to the uncertainty surrounding the future of the Multifibre Agreement. The agreement is at risk in the Uruguay round of general trade negotiations. Newly industrialized low cost countries appear ready to agree to a significant liberalization of their imports assuming that the MFA is terminated in 1992. Some major industrialized countries, mainly the United Kingdom and the Federal Republic of Germany appear ready to grant such a concession.

PART II

RESTRAINT UTILIZATION ANALYSIS

The purpose of this paper is to examine the utilization of the restraint levels and flexibility provisions on textile and clothing products that were contained in the bilateral agreements negotiated by Canada for the period from 1982 to 1986.

1. BACKGROUND

In face of the escalating problem of low cost import competition, Canada has pursued certain solutions through the accepted international negotiating process. Those solutions, negotiated by Canada, have conformed with the Multifibre Agreement (MFA), which provided the international legal framework for the negotiation of bilateral textile restraint agreements.

The MFA was designed to commit the participating countries to a multilateral approach in the search for solutions to the difficulties that might arise in this field. Consequently, participating countries concluded bilateral agreements, on mutually acceptable terms, in order to eliminate the real risks of market disruption and to ensure the expansion and orderly development of trade in textiles.

Such bilateral agreements were designed to enable the attainment of export volumes provided for under such agreements and therefore included provisions assuring substantial flexibility. Those provisions encompassed base levels, growth, carryover, carry forward, swing and the recognition of the increasing interchangeability of natural, artificial and synthetic fibres. This enabled the exporting countries to react to changes in market demand.

The administration of a "voluntary" restraint agreement is implemented through the export control system operated on the authority of the exporting country. The date of shipment (i.e. the date the goods leave the country of origin), is used to determine within which restraint period any textile or clothing products subject to the agreements will be included.

– Background of Canada's bilateral restraint agreements

During the period from January 1, 1982 to December 31, 1986, Canada negotiated a total of twenty-six bilateral restraint agreements. The countries involved in these agreements are:

Bangladesh	Hungary	Malaysia	Singapore
Brazil	India	Maldives	Sri Lanka
Bulgaria	Indonesia	Mauritius	Taiwan
China P.R.	Korea, North	Pakistan	Thailand
Czechoslovakia	Korea, South	Philippines	Turkey
Hong Kong	Macau	Poland	Uruguay
		Romania	Vietnam

The coverage under these agreements has varied from country to country, from restriction on a single textile product to the full line of textile and clothing products on the Canadian import control list. Modifications to the coverage under these agreements have been common, as unrestrained and restrained textile and clothing products from these countries have threatened to cause, or were no longer causing, serious injury to Canadian production.

There has been a differentiation in the treatment that these agreements have allowed between the dominant, newly industrialized suppliers and the smaller, newer entrants. Growth rates and flexibility provisions were less generous for dominant suppliers and more generous for small suppliers.

In addition, foreign policy has had implications in the international negotiations on textile and clothing products. At times, Canada has not been as alert in pursuing import surges from some unrestrained emerging sources, sources that are among the world's poorest countries.

The threat of retaliation from certain exporting countries, which could have damaged other export sectors of our economy, has, on occasion, prevented Canada from acting on the overutilization of restraint levels.

– Background of Restraint Utilization.

An import permit is required for textile and clothing products included on the Import Control List. For each shipment covered by a bilateral restraint agreement, an export licence, provided by the appropriate authorities in the originating country, is necessary before an import permit may be issued. These export licences, backed by import permits, are limited to the annual levels agreed upon with each individual country. The volume of goods specified in the permits that are issued, when related to a specific volume level, commonly expressed in percentage, provides the utilization rate of that restraint.

Restraint utilization rates can be calculated annually from either the original or the adjusted restraint levels. The original restraint level is the number of units to which both parties mutually agreed at the signing of the agreement, while the adjusted restraint level emerges from the use of flexibility provisions which increase or decrease the original restraint level. These flexibility provisions, when applicable, override the original levels to establish utilization rates for administration and statistical purposes.

– Background of Flexibility Provisions

As mentioned, bilateral restraint agreements contain annual levels for each source and product category. They also contain provisions for growth, swing and carryover/carry forward. These provisions, other than growth, are commonly referred to as flexibility provisions.

"Swing" means that a restraint level may be exceeded by a certain percentage provided that an equivalent amount is deducted from another restraint level subject to limitation. For the purpose of implementing the swing provision, appropriate conversion factors were established for the different textile and clothing categories. "Carryover" means that portions of any restraint level which are not used during a specific calendar year may be added to the restraint level of the same product in the following year, within a set percentage limit. "Carry forward" means that any restraint level may be increased within a certain percentage limit provided that an equivalent amount is deducted from the restraint level of the same product in the following year.

There are also percentage limits negotiated within which the carryover/carry forward provisions may be used in combination, and restraint levels may be increased by the combined use of swing, carryover/carry forward.

2. ANALYSIS

Normally this analysis should be for the 1982-1986 period. But 1982, having been an atypical year due to a recession, evidenced restraint levels that had been abnormally underutilized. Therefore this analysis will concentrate on the period January 1, 1983 to December 31, 1986 when more normal circumstances prevailed. Furthermore it will be mainly based on the average restraint utilization rates of both the original and adjusted restraint levels for the four year period since annual rates, due to flexibility provisions, may vary widely from year to year. Restraint utilization rates by country, by product and by year for 1982 to 1986 are presented in Appendix Tables A-23 to A-48.

The analysis will first indicate the utilization rates for clothing followed by the utilization rates for textiles.

3. UTILIZATION RATES FOR CLOTHING

– Overall Restraint Utilization

The number of units specified in the permits issued, the number of countries involved, the number of categories under restraint and the annual utilization rates based on original and adjusted restraint levels, are shown in Table 43. The utilization rates, expressed as a four year average, are 94.0 per cent and 92.7 per cent for the original and the adjusted restraint levels respectively.

Table 43

OVERALL ANNUAL CLOTHING RESTRAINT UTILIZATION 1983-1986

Year	Utilization Rates Per Cent		Number of Units Specified in the Permits Issued	No. of Countries	No. of Categories
	Original	Adjusted			
1983	93.0	92.4	157,650,336	17	124
1984	98.4	95.4	180,920,535	19	132
1985	93.0	92.1	183,861,098	21	141
1986	91.5	90.9	204,499,186	25	181
4 year aver.	94.0	92.7			

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

The 1984 adjusted utilization rate, at 95.4 per cent, was the highest of the four year period. The increased activity in that particular year resulted in the signing of agreements with new entrants, Indonesia and Mauritius, which accounted for three new restraint levels, and in the addition of five new restraint categories with existing suppliers, China, India, Malaysia and Sri Lanka.

The 1986 adjusted utilization rate of 90.9 per cent was the lowest of the four year period. In that year North Korea, Maldives, Turkey and Vietnam, were new entrants and contributed to 31 new restraint categories.

Furthermore during that year, 9 additional restraint levels were agreed upon with existing suppliers: Bangladesh, Brazil, Indonesia, Mauritius and Pakistan. Most of the new restraint categories were large enough to permit an expansion in trade and were far from being fully utilized by the end of the first year, which contributed to the low overall utilization rate of 90.9 per cent.

– Restraint Utilization by Country

Table 44 lists the restrained countries in descending order of overall average adjusted utilization rates of restraints for clothing.

Table 44

AVERAGE CLOTHING RESTRAINT UTILIZATION BY COUNTRY 1983-1986

Country	4 Year Average Original	4 Year Average Adjusted	No. of Categories Under Restraint (1986)	Number of Units Specified in the Permits Issued (1986)
	Per Cent			
China, P.R.	107.2	104.5	12	36,996,828
Hong Kong	100.0	100.0	12	43,352,841
South Korea	99.5	99.0	12	33,710,483
Taiwan	99.8	98.0	12	41,717,350
Macau	99.0	95.3	12	1,547,911
Thailand	98.7	87.5	8	6,517,848
India	91.5	85.0	6	5,791,076
Indonesia (1984-86)	87.3	83.0	9	6,345,270
Sri Lanka	84.3	81.8	6	1,798,793
Mauritius (1984-86)	80.3	78.3	2	1,060,439
Philippines	73.3	77.3	11	6,098,639
Bangladesh (1985-86)	80.0	76.5	2	1,965,733
Pakistan	68.5	67.5	5	3,648,258
Malaysia	72.3	65.3	5	4,495,924
Singapore	60.8	60.8	9	3,305,774
Romania	60.0	59.3	8	2,577,884
Bulgaria	48.0	47.5	7	420,096
Turkey (1986 only)	46.0	46.0	1	347,604
Poland	43.5	43.0	7	1,628,814
Brazil (1985-86)	42.5	42.5	2	430,203
Vietnam (1986 only)	39.0	39.0	12	320,365
Czechoslovakia	31.2	30.3	2	101,316
North Korea (1986 only)	30.0	30.0	6	79,079
Hungary	27.7	27.7	1	19,359
Maldives (1986 only)	9.0	9.0	12	221,299

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

China is the only country to show an overall restraint utilization rate over 100 per cent, averaging 107.2 per cent and 104.5 per cent of the original and adjusted restraint levels respectively. It has consistently overutilized its quotas in several clothing categories, averaging restraint utilization rates over 100 per cent in six of the twelve categories and over 96 per cent in five of the remaining six categories. Only for jackets, coats and rainwear was the average utilization rate at 82 per cent.

China's high utilization rate has been due to a number of factors. Firstly, Chinese prices have been relatively low while the demand for Chinese products by Canadian importers has been high. Secondly, the People's Republic of China has had major difficulties in administering the export licence system and in respecting the agreed upon limitations. Thirdly, China has not been particularly concerned about overshipments: China has felt unjustly treated under the MFA system which, because of historical performance in exports, grants relatively small countries higher restraint levels than to China. Such is the case of Hong Kong, Taiwan and South Korea.

Even though Hong Kong has shown an average overall restraint utilization rate of 100 per cent, it has overutilized its quotas in several clothing categories and as in the case of China, has had four year average restraint utilization rates of over 100 per cent in six categories, and over 94 per cent in four of the remaining six categories. Only sleepwear, at 89.5 per cent, and foundation garments, at 88.5 per cent, have been "poor" performers for Hong Kong. In this latter category the underutilization only occurred at the beginning of the period, in 1983, since foundation garments represented a new category of apparel for Hong Kong exporters. Nevertheless, in the 1984-86 period, the average utilization rate reached 98.7 per cent. Sleepwear represented a product where quota levels tended to be high and utilization rates low from most countries of origin.

South Korea and Taiwan have been efficient users of their quota entitlements. During the 1983-86 period, South Korea achieved a 99 per cent utilization rate of the adjusted restraint levels in clothing and Taiwan 98 per cent. South Korea had high utilization rates with performances of over 94 per cent in ten of the twelve apparel categories of which five were above 99 per cent. Only sleepwear and underwear were "poor" performers for South Korea. Taiwan followed closely with utilization rates over 97 per cent in 10 of the 12 categories. It is remarkable that neither South Korea nor Taiwan had any overutilization of the adjusted restraint levels. Their export licensing system has appeared to be efficient and has been applied with discipline.

High restraint utilization rates require an efficient monitoring system on the part of the exporting countries. It is the monitoring system which triggers the flexibility provisions of the agreement and helps to ensure the full use of all of the restraint categories.

The high utilization rates achieved by the four biggest exporters in most clothing categories indicate that the producers of the four exporting countries are the preferred suppliers of the Canadian importers. This is based either mainly on pricing in case of The People's Republic of China, or on quality, style, and reliability in the case of the three other main exporters. Up to now no other country has been able to achieve comparable results. Only Macau, with four year average utilization rates of 99 per cent of the original level and at 95.3 per cent of the adjusted restraint level came close to the four big exporters. But Macau's performance was achieved under different conditions. Canada's bilateral agreement with Macau specifies individual restraints for 5 of the twelve clothing categories and amalgamates the rest into a non-specific apparel group with a general restraint level. It is easier to fully use a restraint level if the level does not impose restraints by product category. However, the group restraints were manifestly difficult to administer: the restraint for the non-specific apparel category was systematically overutilized and, for the 1983-86 period, stood at 114.3 per cent of the adjusted restraint level.

Overutilization of restraints is also noticeable in a number of years but disappears with the four year averaging, which indicates that overshipments were deducted from the restraint entitlements of the following year.

Table 44 also indicates that the Eastern European socialist countries did not use their restraint levels efficiently. No Eastern European country has achieved a 60 per cent utilization rate of their adjusted restraint levels and their individual product restraints are seldom used at more than 60 or 70 per cent.

As for the other restrained countries, four year average performances vary from a high of 87.5 per cent of the adjusted restraint level for Thailand to 9.0 per cent for the Maldives which signed a bilateral agreement in 1986. These countries have performed well in some clothing categories and relatively poorly in others, depending on how efficiently their export markets were developed by Canadian importers. Generally, all exporting countries have achieved high utilization rates in tailored collar shirts: the incentive program in place for this product makes it worthwhile for Canadian shirt producers to import from all available sources complementing their own lines on price points and quality differences. Canadian shirt producers are able to import a certain volume of shirts from low cost countries duty free. This volume is in a defined proportion of domestic production and represents an incentive for the Canadian shirt producers to develop new sources of imports to avoid restraint limitations and ensuing quota charges. Shirt imports from Bangladesh, India, Indonesia, Malaysia and Thailand were developed in this manner.

– Restraint Utilization by Commodity

Utilization rates by product category are recapitulated in Table 45. The table indicates that, except for foundation garments which constitute a relatively new import category, utilization rates for all categories were high. This result is a consequence of all four big clothing exporting countries (People's Republic of China, Hong Kong, South Korea and Taiwan) making full use of their entitlements year after year. These four countries represent over 80 per cent of all the restraint negotiated.

Table 45

AVERAGE CLOTHING RESTRAINT UTILIZATION BY COMMODITY

Commodity	4 Year Average Original (Per Cent)	4 Year Average Adjusted (Per Cent)	No. of Countries Under Restraint (1986)	Number of Units Specified in the Permits Issued (1986)
32 Outerwear	96.3	94.5	15	3,395,984
37 Pants, Shorts, Overalls	100.0	96.8	22	28,278,916
39 Blouses, Shirts	91.8	90.5	20	60,608,285
40 Sleepwear	96.3	94.0	11	5,699,641
42 Sportswear	91.0	87.5	16	19,515,230
43 Foundation Garments	49.0	67.8	8	2,348,878
44 Swimwear	145.3	142.3	7	4,664,058
45 Underwear	99.5	98.3	13	15,474,953
46 Jackets, Coats	80.5	80.8	18	7,837,168
47 Fine Suits, Blazers	73.3	75.5	14	544,560
49 Tailored Collar Shirts	98.5	97.0	20	19,347,734
50 Sweaters	94.5	95.3	17	29,231,658
Non-specific				7,552,121

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

Among the twelve clothing categories only one, swimwear, has shown a considerable overshipment. The overshipment was caused by one country, China. This situation was corrected in the last year of the 1982-1986 agreements when China was granted an additional 3 million unit quota for woven swimwear.

In summary, the adjusted utilization rates of eight of the twelve categories exceeded 90 per cent, two categories were between 80 per cent and 90 per cent, one was at 75.5 per cent and only foundation garments, a relatively small category in the total, failed to reach 70 per cent.

4. UTILIZATION RATES FOR TEXTILE PRODUCTS

– Overall Restraint Utilization

The interpretation of the rates of utilization of restraints in textiles is more complex than in clothing. In some bilateral agreements textile restraints are specific and precise, with several sub-ceilings in any major category. In others textile retraints are broader and apply to a basket of goods with no sub-limits.

– Restraint Utilization by Country

Textiles and textile products have been classified, in Table 46, into 9 categories for all countries.

As shown in that Table, textiles and textile products were part of 17 of the 26 bilateral agreements negotiated for the 1982-86 period by Canada. Of these 17 agreements none covered all 9 categories. The agreement with Taiwan established restraints on 8 categories, with South Korea on 7, with the People's Republic of China on 6.

Utilization rates varied widely, from 0 per cent in yarns from the Philippines to 99.5 per cent in cotton terry towels from Pakistan. Generally, compared to clothing, restraint utilization rates have tended to be moderate. However, it should be noted that the product categories presented are broad categories which, in some cases, contain a variety of products which, in turn, are subjected to sub-limits. If the restraint on fabrics from South Korea was used at 91.8 per cent, worsted wool fabrics may have well reached a 100 per cent utilization rate of their specific sub-limit.

Table 46

AVERAGE TEXTILE RESTRAINT UTILIZATION BY COUNTRY AND COMMODITY
(per cent)

Country	Yarns	Fabrics	Hosiery	Work Gloves	Hand-bags	Bed Sheets and Pillow cases	Other House-hold	Coated Fabrics and Cordage	Cotton Terry Towels
Brazil	69.6	–	–	–	–	–	–	–	86.0
China, P.R.	–	35.4	95.0	98.1	–	50.2	51.0	–	88.6
Czechoslovakia	–	79.3	–	–	–	–	–	–	92.1
Hong Kong	–	76.4	–	92.5	–	72.1	–	–	74.3
India	–	72.8	–	TA	–	–	–	–	95.4
Korea, South	71.9	91.8	97.6	47.0	56.7	–	13.7	28.7	–
Macau	–	–	–	88.3	–	–	–	–	–
Malaysia	85.7	–	–	–	–	–	–	–	–
Pakistan	–	–	–	98.4	–	–	–	–	99.5
Philippines	0.0	–	–	–	–	–	–	–	–
Poland	–	37.6	–	–	–	–	–	–	59.6
Romania	–	5.4	–	–	–	–	–	–	–
Singapore	63.4	–	126.4	–	–	–	–	–	–
Sri Lanka	–	–	–	95.4	–	–	–	–	–
Taiwan	85.9	86.4	95.5	92.6	89.6	28.1	–	55.5	92.4
Thailand	–	–	83.2	65.7	–	–	–	–	–
Uruguay	–	87.7	–	–	–	–	–	–	–

TA: Textile aggregates.

Note: Percentages based on the four year average utilization of the adjusted restraint levels.

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

As can be seen in Table 46, Singapore overshipped its hosiery restraint in 1983. The overshipment was of such magnitude that Singapore was prevented from exporting any hosiery to Canada during the last 3 years of the bilateral agreement. There were other annual over-utilizations of restraints committed by other countries as well but they do not show up in the table due to 4 year averaging.

– Restraint Utilization by Commodity

Restraint utilization by textile commodity confirms the previous conclusion of generally lower utilization rates than for clothing (Table 47).

Table 47

AVERAGE TEXTILE RESTRAINT UTILIZATION BY COMMODITY

Commodity	4 Year Average Original	4 Year Average Adjusted	No. of Countries Under Restraint (1986)	Number of Units Specified in the Permits Issued (1986)
	Per Cent			
Yarns	80.0	72.5	6	3,094,974 (kgs)
Fabrics	76.1	72.3	9	9,879,208 (kgs)
Hosiery	98.0	96.0	5	16,736,780 (pairs)
Work Gloves	89.6	92.1	9	31,987,657 (pairs)
Handbags	67.4	63.7	2	2,971,875 (units)
Bed Sheets and Pillowcases	48.9	48.7	3	1,051,514 (kgs)
Other Household	36.0	35.9	2	370,106 (kgs)
Coated Fabrics and Cordage	34.3	34.4	2	1,178,816 (kgs)
Cotton Terry Towels	89.2	85.3	8	3,515,178 (kgs)

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

Of the nine textile commodity categories only two, hosiery and work gloves, had utilization rates of over 90 per cent. The cotton terry towel category followed with 85 per cent, while yarns and fabrics stood at 72 per cent and handbags at 64 per cent. The remaining three commodity categories had restraint utilization rates below 50 per cent.

These low restraint utilization rates are a consequence of the negotiating strategies surrounding the bilateral agreements. Sometimes restraints are negotiated on less sensitive products and, in such cases, negotiators can offer specific product volumes which do not threaten Canadian producers.

5. UTILIZATION OF FLEXIBILITY PROVISIONS

Flexibility provisions vary according to the dominant or non dominant position of the exporting country and to the sensitivity of different product categories. In the bilateral agreements negotiated for the 1982-86 period, carryover and carry forward provisions were mostly in the 10/5 and 11/6 per cent range. This meant that the annual unadjusted volume level for a particular product category could have been increased by 10 or 11 per cent in the following year if <u>either</u> carryover or carry forward had been used, or that the volume level could have been increased by 5 or 6 per cent each if <u>both</u> carryover and carry forward had been used for the same period.

However, there were some notable exceptions to those rates. In the bilateral agreement with South Korea, a dominant exporting country, carryover and carry forward were limited to 2/1 per cent for the categories "outerwear" and "tailored collar shirts". In the agreement with Taiwan, another dominant exporting country, carryover and carry forward were limited to 1/0.5 per cent for the categories "jackets and coats", "fine suits and blazers" and "tailored collar shirts". On the other hand, poor countries which were relative newcomers to the international trade in textiles and clothing benefitted from exceptionally high flexibility provisions: Malaysia received a carryover-carry forward provision of 50 per cent for "sportswear" and Bangladesh received 100 per cent for "pants and trousers", "tailored collar shirts" and "jackets and coats".

The same approach prevailed for swing provisions. While most bilateral agreements contained swing provisions in the 5 to 7 per cent range, dominant exporting countries (South Korea and Taiwan) were limited to 2 per cent in many clothing categories. There was no limitation in swing for those countries which signed their bilateral agreements at the end of the 1982-86 period and were therefore newcomers (North Korea, Turkey and Vietnam). It should be added that swing applies to either textiles or clothing and that there is no swing between these two groups of products.

Among Canada's 26 bilateral agreements in the 1982-86 period only 12 contained flexibility provisions limited to a combined 10 to 15 per cent flexibility range, whereas the other 14 agreements allowed combined flexibility provisions without any preset ceiling range. Combined flexibility had a ceiling of 10 to 12 per cent with The People's Republic of China and Hong Kong, 3.5 to 12 per cent with South Korea, 3 to 11 per cent with Taiwan, depending on the sensitivity of different product categories. The Eastern European socialist countries were mostly limited to 11 per cent combined flexibility range and the other exporting countries, to 15 per cent.

Compared to the negotiated flexibility provision limits of 15 to 18 per cent per year, the actual utlization of flexibility provisions has been much lower for both clothing and textiles (Tables 48 and 49).

There was no year and no product group in which positive flexibility provision utilization reached 10 per cent. As for restraint reduction, which may result from a combination of carry forward in the previous year, previous overshipments or swing, the most important reduction, exceeding 30 per cent, took place in foundation garments. It resulted from the use of swing by the Philippines which, instead of foundation

Table 48

EFFECTIVE ANNUAL FLEXIBILITY RATES FOR CLOTHING
(Per cent)

Commodity		1983	1984	1985	1986
Outerwear	+	1.6	2.3	1.9	2.4
	−	0.2	0.0	0.0	0.0
Pants, Shorts and Overalls	+	6.4	6.0	2.9	2.3
	−	0.0	2.5	1.4	0.2
Blouses and Shirts	+	0.5	7.0	2.0	0.7
	−	2.3	1.2	1.6	0.9
Sleepwear	+	1.1	7.1	2.8	1.4
	−	1.7	0.0	0.1	1.5
Sportswear	+	2.3	6.8	3.0	5.8
	−	0.1	0.3	1.6	0.0
Foundation Garments	+	0.0	9.0	2.0	0.0
	−	0.0	31.1	33.9	35.9
Swimwear	+	0.8	3.4	2.8	0.2
	−	1.3	0.0	0.0	0.0
Underwear	+	2.3	3.6	1.2	1.2
	−	0.0	0.0	2.7	1.4
Jackets and Coats	+	6.1	2.2	4.4	0.9
	−	1.8	6.5	0.7	4.2
Fine Suits and Blazers	+	1.9	1.3	1.2	3.7
	−	0.2	1.4	7.9	7.4
Tailored Collar Shirts	+	0.8	2.5	3.0	2.5
	−	0.8	0.0	0.5	0.5
Sweaters	+	0.0	0.9	3.9	3.4
	−	5.2	4.3	0.4	0.7

Note: +: Per cent by which the original restraint levels were increased.
−: Per cent by which the original restraint levels were decreased.

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

garments, chose to export other clothing products. As swing is based on square meter equivalents for different categories of clothing the Philippines had to give up more than a million units of foundation garments (using a conversion factor of 0.3m^2) annually in order to increase its restraints in sleepwear (using a conversion factor of 2.8 to 3.3m^2), in sportswear (using a conversion factor of 2.7m^2) or in tailored collar shirts (using a conversion factor of 1.8m^2).

The limited use of flexibility provisions had a simple explanation. The four dominant exporting countries had made full use of their restraint entitlements leaving little room for carryover and swing. They did not use carry forward very often because it would have diminished their restraints in the following year. The four dominant exporting countries, representing some 80 per cent of the restraints, have been preferred suppliers to Canadain importers and year after year have been reasonably assured of selling the volumes to which they were entitled.

Table 49

EFFECTIVE ANNUAL FLEXIBILITY RATES FOR TEXTILES
(Per cent)

Commodity		1983	1984	1985	1986
Yarns	+	12.5	11.0	7.6	11.2
	–	0.0	0.0	0.0	0.1
Fabrics	+	4.7	5.6	4.8	6.1
	–	0.0	0.0	0.1	0.0
Hosiery	+	2.4	6.2	7.5	5.8
	–	0.0	9.3	4.1	0.0
Work Gloves	+	1.4	1.6	0.8	2.1
	–	6.4	5.5	2.9	2.2
Handbags	+	9.0	10.2	2.2	2.2
	–	0.0	0.0	1.0	1.0
Bed Sheets and Pillowcases	+	0.0	1.1	1.7	6.0
	–	5.7	0.0	0.0	0.0
Other Household	+	4.3	4.3	0.0	3.8
	–	0.0	7.5	0.0	0.0
Coated Fabrics and Cordage	+	1.9	9.8	1.7	0.9
	–	2.2	0.0	3.6	7.0
Cotton Terry Towels	+	8.6	8.3	0.5	4.6
	–	0.0	0.9	3.7	0.2

Note: +: Per cent by which the original restraint levels were increased.
–: Per cent by which the original restraint levels were decreased.

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

The utilization of flexibility provisions in textiles differed from those in clothing in two ways. Firstly, textile restraints have always been negotiated more liberally than clothing restraints and combined flexibility was in the 10 to 12 per cent range. Therefore, positive adjustments have been the dominant factor and have often been fully used. Secondly, this wider scope of positive flexibility has made negative adjustments (reduction of restraints because of carry forward, overshipment or swing) largely unnecessary. It is revealing to see that in yarns and fabrics negative adjustments were nil or marginal. However there have been negative adjustments in hosiery and workgloves. In hosiery, Singapore overshipped its restraint in 1983 and had to accept significant restraint reductions over the following two years. As for workgloves which represent a low value added category, well established exporting countries like Hong Kong and South Korea have preferred to give up parts of their restraints through swing in order to gain wider restraints in more profitable products.

In summing up, it can be said that, while many countries have used flexibility provisions for different product categories in different years, the degree of their utilization has generally remained far below the theoretical potential.

6. CONCLUSIONS

With only 26 bilateral agreements negotiated by Canada for the 1982-1986 period, Canada's network of bilateral agreements has been significantly less comprehensive than that of the United States with 43 bilateral agreements, and thus gave more scope to Canadian importers for sourcing from unrestrained low cost countries.

Further flexibility in the system of bilateral agreements has been provided by the fact that, while the four dominant low cost exporting countries have been restrained in almost all textile and clothing categories, only a limited number of categories have been restrained from other low costs sources. These smaller exporting countries have been free to export in a number of textile and clothing categories since their actual exports of such products were either non-existant or so small that no restraint action could have been justified following the criteria established in the MFA. Many unrestrained product lines could have been therefore imported from otherwise restrained low cost sources.

Further flexibility has been available in each year of the 1982-1986 bilaterals through the incomplete utilization of restraints and flexibility provisions. Only the restraint levels of the four dominant low cost exporting countries were consistently utilized, thus leaving little room for the use of flexibility provisions. Restraints from other low cost exporting countries were globally used at rates below 80 per cent and unused portions of flexibility provisions were widely available.

In accordance with the MFA, the Canadian restraint system on low cost imports of textiles and clothing has never been and is not supposed to be a tightly closed system. There has always been flexibility in the system, even during periods of high exchange value for the Canadian dollar. However, the system prevents unlimited imports of specific goods from a limited number of dominant low cost exporting countries.

Canadian manufacturers continue to enjoy broad accessibility to world supplies of textiles and clothing through unused quotas, growth rates, and flexibility provisions or through unrestrained countries.

APPENDIX

Table A-1

GROSS NATIONAL OR GROSS DOMESTIC PRODUCT AND ITS COMPONENTS IN MAJOR INDUSTRIALIZED COUNTRIES*, 1982-87, AT CONSTANT PRICES

Percentage Change from Previous Year

Country and GNP (or GDP) Component	1982/81	1983/82	1984/83	1985/84	1986/85	1987/86
CANADA						
Consumers' Expenditure	−2.6	3.4	4.3	5.2	3.9	4.5
Government Expenditure	2.6	0.8	1.9	3.5	0.6	2.1
Private Domestic Fixed Investment	−12.8	−0.3	1.1	7.9	6.2	11.1
Exports of Goods & Services	−2.2	6.4	18.8	6.0	4.7	5.6
Imports of Goods & Services	−15.2	9.0	16.6	8.3	7.2	9.0
GDP	−3.2	3.2	6.3	4.3	3.3	3.9
UNITED STATES						
Consumers' Expenditure	1.3	4.7	4.8	4.6	4.2	1.9
Government Expenditure	2.0	1.1	4.4	7.3	3.8	2.3
Private Domestic Fixed Investment	−6.7	8.2	16.8	5.5	1.8	0.7
Exports of Goods & Services	−7.8	−3.8	6.8	−1.7	3.3	12.8
Imports of Goods & Services	1.4	9.6	23.9	3.9	10.5	7.3
GNP	−2.1	3.6	6.8	3.0	2.9	2.9
JAPAN						
Consumers' Expenditure	4.3	3.2	2.7	2.6	2.7	3.9
Government Expenditure	0.8	0.8	1.2	−1.7	6.7	1.7
Private Domestic Fixed Investment	2.6	0.3	8.1	10.1	7.2	10.9
Exports of Goods & Services	3.5	4.2	17.5	5.3	−4.8	3.5
Imports of Goods & Services	2.6	−5.1	11.1	−0.1	3.3	9.1
GNP	3.3	3.2	5.1	4.7	2.5	4.2
FRANCE						
Consumers' Expenditure	3.4	1.0	1.0	2.4	3.3	2.3
Government Expenditure	2.4	1.4	1.1	3.2	2.7	2.1
Private Domestic Fixed Investment	0.7	−2.3	−2.3	1.1	3.1	2.9
Exports of Goods & Services	−2.6	4.4	7.1	2.1	−0.7	1.2
Imports of Goods & Services	6.8	−0.6	2.9	4.7	6.9	6.4
GDP	1.8	0.7	1.4	1.7	2.0	1.9
ITALY						
Consumers' Expenditure	0.5	−0.3	2.2	2.7	3.2	4.1
Government Expenditure	2.6	2.4	2.0	3.5	3.0	1.6
Private Domestic Fixed investment	−5.2	−3.8	4.4	3.3	1.2	1.5
Exports of Goods & Services	0.4	3.4	7.6	4.0	3.1	−0.1
Imports of Goods & Services	1.5	−0.4	11.3	5.3	5.1	8.0
GDP	−0.5	−0.2	3.5	2.7	2.7	2.5
UNITED KINGDOM						
Consumers' Expenditure	0.7	4.0	2.5	3.9	6.0	5.2
Government Expenditure	1.1	1.9	0.8	0.0	0.8	1.2
Private Domestic Fixed Investment	6.4	5.7	8.2	3.1	0.1	3.5
Exports of Goods & Services	1.2	2.2	7.1	5.7	3.2	5.6
Imports of Goods & Services	5.3	5.5	9.8	2.8	6.2	7.6
GDP	1.4	3.8	2.3	3.8	3.0	3.6
WEST GERMANY						
Consumers' Expenditure	−1.3	1.7	1.5	1.8	4.3	3.1
Government Expenditure	−0.9	0.2	2.4	2.1	2.3	1.5
Private Domestic Fixed investment	−5.3	3.2	0.8	0.1	3.1	1.7
Exports of Goods & Services	3.2	−0.6	9.0	7.2	−0.1	0.8
Imports of Goods & Services	−0.1	0.8	5.3	4.7	3.5	4.7
GNP	−1.0	1.8	3.3	2.0	2.5	1.7

* GDP for Canada, France, Italy and the United Kingdom; GNP for other countries.

SOURCE: Statistics Canada, Cat. 13-001 (Fourth Quarter 1987) – for Canada; O.E.C.D., *Main Economic Indicators* (January 1986, January 1987 and April 1988) – for other countries. (Data for Italy for 1987 are preliminary).

Table A-2

TOTAL INDUSTRIAL PRODUCTION AND MANUFACTURING PRODUCTION IN MAJOR INDUSTRIALIZED COUNTRIES, 1982-1987

Percentage Change from Previous Year

	Total Industrial Production						Manufacturing Production					
Country/Region	**1982/81**	**1983/82**	**1984/83**	**1985/84**	**1986/85**	**1987/86**	**1982/81**	**1983/82**	**1984/83**	**1985/84**	**1986/85**	**1987/86**
Canada	−9.8	6.5	14.1	5.2	1.3	4.5	−12.9	6.5	15.3	5.5	2.3	4.8
United States	−8.7	6.3	10.9	1.8	0.9	3.5	−8.7	8.5	11.8	2.6	1.7	4.2
Japan	0.0	4.0	10.5	5.2	−0.8	4.1	0.0	4.0	11.4	4.3	0.0	4.1
France	−2.0	1.0	2.0	0.0	1.0	3.4	−1.0	0.0	2.1	0.0	0.0	3.5
Italy	−3.1	−2.1	3.2	1.0	3.1	3.0	−4.1	−2.1	3.3	2.1	3.1	2.0
United Kingdom	2.1	3.0	1.0	4.9	1.9	2.7	0.0	3.2	4.1	3.0	0.0	5.8
West Germany	−3.0	1.1	3.1	6.1	1.9	0.0	−3.1	1.1	3.1	5.1	2.9	0.0
E.E.C.	−2.0	1.0	2.0	3.0	1.9	1.9	−2.1	0.0	3.1	3.0	2.0	1.9
O.E.C.D. Europe	−1.0	1.0	3.1	3.0	1.9	1.9	−1.0	1.1	3.1	3.0	1.9	1.0
O.E.C.D. North America	−7.8	5.3	11.0	1.8	0.9	4.3	−8.8	7.4	11.9	2.6	1.7	4.2
O.E.C.D. Total	**−4.0**	**3.1**	**7.0**	**2.8**	**1.8**	**2.7**	**−4.0**	**3.1**	**8.1**	**3.7**	**0.9**	**3.6**

SOURCE: Statistics Canada, Cat. 15-001 (June 1987; January 1988) – for Canada; O.E.C.D. *Indicators of Industrial Activity* (1984-IV, 1985-IV, 1986-IV, 1987-IV and 1988-I) and *Main Economic Indicators* (April 1988) – for other countries. (Data for 1987 for all countries/regions except Canada are preliminary).

Table A-3

REAL DOMESTIC PRODUCT PER EMPLOYEE IN TEXTILE AND CLOTHING INDUSTRIES AND IN ALL MANUFACTURING, 1981-1988 1st 4 Months

Percentage Change from Previous Year

Year	Textiles				Clothing				All Manufacturing Industries			
	RDP Million Dollars	Empl. Thousands	RDP per Employee Dollars	Change Per cent	RDP Million Dollars	Empl. Thousands	RDP per Employee Dollars	Change Per cent	RDP Million Dollars	RDP per Empl. Thousands	Employee Dollars	Change Per cent
1981	1741.5	64.9	26848.9		2078.3	113.7	18276.2		61648.0	1854.0	33251.9	
1982	1350.9	57.1	23663.5	−11.9	1845.4	106.8	17265.0	−5.5	53702.4	1702.3	31546.9	−5.1
1983	1738.1	60.8	28589.5	20.8	1847.5	109.8	16823.6	− 2.6	57168.7	1671.1	34209.4	8.4
1984	1766.1	60.1	29399.7	2.8	2000.2	110.6	18079.4	7.5	65923.9	1722.0	38282.3	11.9
1985	1776.8	57.9	30704.4	4.4	2012.5	110.9	18145.3	0.4	69534.3	1766.8	39356.9	2.8
1986	1843.6	60.8	30327.4	−1.2	2088.6	104.1	20072.8	10.6	71122.0	1739.2	40894.2	3.9
1987	1983.7	61.1	32492.0	7.1	2148.5	117.2	18329.4	− 8.7	74514.1	1900.3	39212.3	−4.1
1988 JAN	2059.0	60.5	34051.6	5.5	2165.3	111.1	19482.1	8.7	77632.5	1876.9	41362.9	4.7
FEB	2000.2	59.4	33667.7	1.2	2095.5	110.5	18961.4	2.2	76926.1	1865.6	41233.7	3.1
MAR	2008.2	59.1	33972.8	4.9	2157.5	109.0	19786.0	6.4	77353.3	1876.5	41222.3	3.3
APR	1991.9	61.1	32625.2	3.1	2137.7	112.8	18945.5	0.3	77545.8	1906.2	40681.5	3.2

SOURCE: Statistics Canada, Cat. 61−005 and 15-001 (for RDP), 31-203 (for Employment, 1981-85), and 72-002 and CANSIM Matrices 1432 and 8003 (for Employment, 1986-88). The data have been adjusted to conform to the 1980 SIC definitions of these industries.

Table A-4

REAL DOMESTIC PRODUCT PER HOUR WORKED PER EMPLOYEE PAID BY THE HOUR IN TEXTILE AND CLOTHING INDUSTRIES AND IN ALL MANUFACTURING, 1981-1988 1st 4 Months

Year	Textiles*				Clothing*				All Manufacturing Industries			
	RDP ($M)	Av. Weekly Hours Worked	HourlyPaid Employees ('000)	RDP per Hour Worked per Employee ($)	RDP ($M)	Av. Weekly Hours Worked	Hourly Paid Employees ('000)	RDP per Hour Worked per Employee ($)	RDP ($M)	Av. Weekly Hours Worked	Hourly Paid Employees ('000)	RDP per Hour Worked per Employee ($)
1981	1741.5	39.0	45.1	19.05	2078.3	35.8	80.3	13.90	61648.0	38.5	1087.9	28.28
1982	1350.9	38.0	36.7	18.66	1845.4	34.8	65.0	15.70	53702.4	37.7	959.0	28.83
1983	1738.1	39.3	42.9	19.81	1847.5	36.1	62.7	15.72	57168.7	38.4	1131.2	25.30
1984	1766.8	39.5	42.5	20.24	2002.2	35.8	64.0	16.82	65923.9	38.5	1090.9	30.17
1985	1776.8	39.5	43.1	20.10	2012.5	36.5	62.5	16.97	89534.3	38.8	1111.9	30.98
1986	1843.6	38.7	44.1	20.78	2088.6	36.0	63.2	17.66	71122.0	38.8	1134.8	31.10
1987	1983.7	39.1	43.7	22.31	2148.5	36.9	73.3	15.28	74514.1	38.8	1250.2	29.54
1988 JAN	2059.0	39.6	43.2	23.13	2165.3	36.3	67.2	17.07	77632.5	38.9	1223.4	31.37
FEB	2000.2	39.7	42.5	22.79	2095.5	36.5	67.2	16.44	76926.1	38.8	1215.1	31.38
MAR	2008.2	38.7	41.6	24.00	2157.5	36.6	65.7	17.25	77353.3	38.9	1223.3	31.26
APR	1991.9	39.0	43.7	22.50	2137.7	36.6	68.0	16.52	77545.8	39.0	1248.3	30.63

* Data on textile and clothing employment and hours worked have been ajusted to conform to the 1980 SIC definitions of these industries. RDP data are already on this base.

SOURCE: Statistics Canada, Cat. 15-001, 31-203, 72-002 and CANSIM Matrices 1434, 2932, 8005 and 8018.

Table A-5

INVESTMENT EXPENDITURES IN TEXTILE, CLOTHING AND KNITTING INDUSTRIES AND IN TOTAL MANUFACTURING, 1981-1988

INDUSTRY/ TYPE OF INVESTMENT	Investment (Millions of Current Dollars)*								Change from Previous Year (Per Cent)						
	1981	1982	1983	1984	1985	1986	1987	1988	1982/81	1983/82	1984/83	1985/84	1986/85	1987/86	1988/87
TEXTILES															
New Inv. – Buildings	20.9	22.0	24.4	25.3	27.0	33.2	24.0	27.7	5.3	10.9	3.7	6.7	23.0	−27.7	15.4
– Mach. & Eq.	142.9	121.7	129.3	161.4	179.5	223.0	217.0	280.6	−14.8	6.2	24.8	11.2	24.2	−2.7	29.3
Total Inv. – Buildings	39.9	37.3	39.3	41.5	42.9	50.2	40.0	45.2	−6.5	5.4	5.6	3.4	17.0	−20.3	13.0
– Mach. & Eq.	221.3	204.9	217.2	258.6	290.7	338.1	326.0	393.6	−7.4	6.0	19.1	12.4	16.3	−3.6	20.7
CLOTHING															
New Inv. – Buildings	13.1	4.9	4.1	4.3	5.8	4.5	19.5	4.4	−62.6	−16.3	4.9	34.9	−22.4	333.3	−77.4
– Mach. & Eq.	24.1	14.6	18.7	24.7	23.6	34.0	32.4	35.0	−39.4	28.1	32.1	−4.5	44.1	−4.7	8.0
Total Inv. – Buildings	15.8	7.3	7.5	7.7	9.1	6.8	22.3	6.6	−53.8	2.7	2.7	18.2	−25.3	227.9	−70.4
– Mach. & Eq.	32.0	21.8	27.5	32.6	34.0	46.2	43.3	45.3	−31.9	26.1	18.5	4.3	35.9	−6.3	4.6
KNITTING															
New Inv. – Buildings	3.1	2.5	9.2	8.9	1.7	1.1	5.0	4.6	−19.4	268.0	−3.3	−80.9	−35.3	354.5	−8.0
– Mach. & Eq.	13.9	13.4	17.2	16.6	14.8	20.3	18.0	19.6	−3.6	28.4	−3.5	−10.8	37.2	−11.3	8.9
Total Inv. – Buildings	5.1	3.7	11.1	11.2	2.9	2.0	5.9	5.3	−27.5	200.0	0.9	−74.1	−31.0	195.0	−10.2
– Mach. & Eq.	19.8	18.3	24.1	23.3	19.5	25.8	23.1	24.4	−7.6	31.7	−3.3	−16.3	32.3	−10.5	5.6
ALL TEXTILE INDUSTRIES															
New Inv. – Buildings	37.1	29.4	37.7	38.5	34.5	38.8	48.5	36.7	−20.8	28.2	2.1	−10.4	12.5	25.0	−24.3
– Mach. & Eq.	180.9	149.7	165.2	202.7	217.9	277.3	267.4	335.2	−17.2	10.4	22.7	7.5	27.3	−3.6	25.4
Total Inv. – Buildings	60.8	48.3	57.9	60.4	54.9	59.0	68.2	57.1	−20.6	19.9	4.3	−9.1	7.5	15.6	−16.3
– Mach. & Eq.	273.1	245.0	268.8	314.5	344.2	410.1	392.4	463.3	−10.3	9.7	17.0	9.4	19.1	−4.3	18.1
TOTAL MANUFACTURING															
New Inv. – Buildings	3074.3	2908.7	1895.9	1823.5	2565.6	2525.5	2703.2	2877.4	−5.4	−34.2	−3.8	40.7	−1.6	7.0	6.4
– Mach. & Eq.	9665.0	8563.8	6962.5	7063.2	8950.5	11723.8	12250.3	15484.6	−11.2	−18.9	1.4	26.7	31.0	4.5	26.4
Total Inv. – Buildings	3925.1	3706.3	2680.4	2741.8	3459.7	3394.4	3638.8	3850.6	−5.6	−27.7	2.3	26.2	−1.9	7.2	5.8
– Mach. & Eq.	13769.3	12640.5	11189.4	11892.6	14138.3	17375.2	18088.0	21612.9	−8.2	−11.5	6.3	18.9	22.9	4.1	19.5

* Actual Expenditures for 1981-86, Preliminary Actual for 1987, and Intentions for 1988. (Total investment = capital expenditures (new investment) + repair expenditures).

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

Table A-6

REGIONAL DISTRIBUTION OF NEW INVESTMENTS* IN TEXTILE, CLOTHING AND KNITTING INDUSTRIES AND IN TOTAL MANUFACTURING, 1981-1988

Millions of Current Dollars

	Buildings								Machinery and Equipment							
SECTOR/REGION	**1981**	**1982**	**1983**	**1984**	**1985**	**1986**	**1987**	**1988**	**1981**	**1982**	**1983**	**1984**	**1985**	**1986**	**1987**	**1988**
TEXTILES																
Quebec	11.5	11.8	4.9	8.6	13.8	15.0	12.8	12.6	70.7	68.8	58.8	66.4	59.8	63.1	73.4	97.5
Ontario	8.2	9.0	17.2	15.9	12.2	17.4	9.0	14.1	64.3	50.9	63.2	90.3	116.2	154.0	136.8	168.0
Rest of Canada	1.2	1.2	2.3	0.8	1.0	0.8	2.2	1.0	7.9	2.0	7.3	4.7	3.5	5.9	6.8	15.1
Canada	**20.9**	**22.0**	**24.4**	**25.3**	**27.0**	**33.2**	**24.0**	**27.7**	**142.9**	**121.7**	**129.3**	**161.4**	**179.5**	**223.0**	**217.0**	**280.6**
CLOTHING																
Quebec	5.2	0.8	1.6	2.1	3.5	1.4	12.0	2.2	8.0	6.5	8.7	11.5	12.0	17.9	13.5	17.1
Ontario	4.8	1.2	0.6	1.0	1.6	0.8	3.6	1.6	7.9	4.7	6.9	9.6	8.0	11.0	13.7	13.5
Rest of Canada	3.1	2.9	1.9	1.2	0.7	2.3	3.9	0.6	8.2	3.4	3.1	3.6	3.6	5.1	5.2	4.4
Canada	**13.1**	**4.9**	**4.1**	**4.3**	**5.8**	**4.5**	**19.5**	**4.4**	**24.1**	**14.6**	**18.7**	**24.7**	**23.6**	**34.0**	**32.4**	**35.0**
KNITTING																
Quebec	2.2	1.5	3.8	3.1	0.7	0.7	4.4	1.9	8.8	9.7	11.4	11.4	7.2	11.7	8.7	10.8
Ontario	0.8	1.0	5.4	5.8	1.0	0.4	0.4	2.7	4.7	2.9	5.4	4.9	7.0	7.6	7.1	8.1
Rest of Canada	0.1	–	–	–	–	–	0.2	–	0.4	0.8	0.4	0.3	0.6	1.0	2.2	0.7
Canada	**3.1**	**2.5**	**9.2**	**8.9**	**1.7**	**1.1**	**5.0**	**4.6**	**13.9**	**13.4**	**17.2**	**16.6**	**14.8**	**20.3**	**18.0**	**19.6**
ALL TEXTILE INDUSTRIES																
Quebec	18.9	14.1	10.3	13.8	18.0	17.1	29.2	16.7	87.5	85.0	78.9	89.3	79.0	92.7	95.6	125.4
Ontario	13.8	11.2	23.2	22.7	14.8	18.6	13.0	18.4	76.9	58.5	75.5	104.8	131.2	172.6	157.6	189.6
Rest of Canada	4.4	4.1	4.2	2.0	1.7	3.1	6.3	1.6	16.5	6.2	10.8	8.6	7.7	12.0	14.2	20.2
Canada	**37.1**	**29.4**	**37.7**	**38.5**	**34.5**	**38.8**	**48.5**	**36.7**	**180.9**	**149.7**	**165.2**	**202.7**	**217.9**	**277.3**	**267.4**	**335.2**
TOTAL MANUFACTURING																
Quebec	524.4	581.8	493.6	652.1	912.9	771.5	711.9	873.3	1748.0	1578.0	1594.2	2098.9	2481.6	2492.4	3202.5	3846.0
Ontario	1158.4	924.8	720.5	727.4	1292.7	1294.6	1205.8	1051.3	4488.3	3676.2	3167.6	3276.9	4573.5	6703.0	6412.0	7672.7
Rest of Canada	1391.5	1402.1	681.8	444.0	360.0	459.4	785.5	952.8	3428.7	3329.6	2200.7	1687.4	1895.4	2528.4	2635.8	3965.9
Canada	**3074.3**	**2908.7**	**1895.9**	**1823.5**	**2565.6**	**2525.5**	**2703.2**	**2877.4**	**9665.0**	**8583.8**	**6962.5**	**7063.2**	**8950.5**	**11723.8**	**12250.3**	**15484.6**

* Actual Expenditures for 1981-86, Preliminary Actual for 1987, and Intentions for 1988.

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

Table A-7

REGIONAL DISTRIBUTION OF EMPLOYMENT AND NEW INVESTMENTS IN TEXTILE, CLOTHING AND KNITTING INDUSTRIES AND IN TOTAL MANUFACTURING, 1981-1988

Per Cent

SECTOR/REGION	Employment								New Investments							
	1981	1982	1983	1984	1985	1986	1987	1988 1st Quarter	1981	1982	1983	1984	1985	1986	1987	1988 Intentions
TEXTILES																
Quebec	47.2	46.9	46.4	46.4	43.6	43.2	42.9	41.8	50.2	56.1	41.4	40.2	35.6	30.5	35.8	35.7
Ontario	46.9	46.9	46.9	46.6	48.4	48.8	48.8	49.6	44.3	41.7	52.3	56.9	62.2	66.9	60.5	59.1
Rest of Canada	5.9	6.2	6.7	7.0	8.0	8.0	8.3	8.6	5.5	2.2	6.3	2.9	2.2	2.6	3.7	5.2
Canada	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
CLOTHING																
Quebec	60.1	58.6	61.0	54.3	57.6	59.3	60.6	59.7	35.5	37.4	45.2	46.9	52.7	50.1	49.1	49.0
Ontario	26.0	27.5	25.9	32.1	29.2	27.1	26.3	25.9	34.1	30.3	32.9	36.6	32.7	30.7	33.3	38.3
Rest of Canada	13.9	13.9	13.1	13.6	13.2	13.6	13.1	14.4	30.4	32.3	21.9	16.5	14.6	19.2	17.6	12.7
Canada	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
KNITTING																
Quebec	52.9	53.0	54.1	53.3	55.1	52.5	56.5	56.5	64.7	70.5	57.6	56.9	47.9	57.9	57.0	52.5
Ontario	36.9	37.5	37.8	38.0	35.8	38.0	33.7	33.9	32.4	24.5	40.9	41.9	48.5	37.4	32.6	44.6
Rest of Canada	10.2	9.5	8.1	8.7	9.1	9.5	9.8	9.6	2.9	5.0	1.5	1.2	3.6	4.7	10.4	2.9
Canada	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
ALL TEXTILE INDUSTRIES																
Quebec	54.3	53.5	54.9	51.2	52.1	52.6	54.0	52.9	48.8	55.3	44.0	42.7	38.4	34.7	39.5	38.2
Ontario	35.3	36.1	34.9	38.2	37.0	36.3	35.0	35.3	41.6	38.9	48.6	52.9	57.9	60.5	54.0	55.9
Rest of Canada	10.4	10.4	10.2	10.6	10.9	11.1	11.0	11.8	9.6	5.8	7.4	4.4	3.7	4.8	6.5	5.9
Canada	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
TOTAL MANUFACTURING																
Quebec	28.0	27.4	27.6	27.2	27.1	27.5	28.0	27.5	17.8	18.8	23.6	31.0	29.5	22.9	26.2	25.7
Ontario	50.4	51.2	51.4	51.9	51.6	51.6	50.6	51.1	44.3	40.0	43.9	45.0	50.9	56.1	52.9	47.5
Rest of Canada	21.6	21.4	21.0	20.9	21.3	20.9	21.4	21.4	37.9	41.2	32.5	24.0	19.6	21.0	22.9	26.8
Canada	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

SOURCE: Statistics Canada, CANSIM matrices 1432, 1462, 1467, 8003, 8303 and 8363 (for Employment), and Table A-6 (for New Investments).

Table A-8

TEXTILE AND KNITTING INDUSTRIES SOME KEY FINANCIAL RATIOS, 1981-1988 1st Quarter

(in per cent unless otherwise indicated)

RATIO	1981	1982	1983	1984	1985[1]	1986		1987		1988
						From Quarterly Average[2]	Estimate[3]	From Quarterly Average[2]	Estimate[3]	First Quarter Average[2]
A. FINANCIAL STRUCTURE										
Fixed assets/Equity	58.65	64.18	57.25	58.97	58.93	61.43	55.34	57.85	52.12	55.22
Current liabilities/Equity	78.45	76.08	68.94	73.13	64.94	54.72	63.61	53.37	62.04	52.99
Long-term debt/Equity	28.93	31.11	27.54	27.18	22.37	25.89	21.85	17.36	11.65	13.61
B. PROFITABILITY										
Profits before tax/Capital employed	12.14	2.16	11.66	11.52	8.00	14.04	15.17	18.85	20.37	20.65
Profits after tax/Capital employed	7.37	1.68	8.61	7.65	3.96	8.63	11.62	11.29	15.20	15.08
Profits before tax/Total income	4.96	0.94	5.14	4.83	3.55	6.86	6.85	8.83	8.82	9.58
Profits after tax/Total income	3.01	0.73	3.79	3.21	1.76	4.21	5.36	5.30	6.75	7.00
Profits before tax/Equity	16.85	3.05	15.97	15.80	10.54	19.03	19.60	24.09	24.82	25.61
Profits after tax/Equity (return on investment	10.23	2.36	11.79	10.50	5.23	11.69	15.05	14.42	18.56	18.70
C. LIQUIDITY (Ratios)										
Current Assets/Current liabilities	1.76	1.68	1.78	1.77	1.78	1.96	1.76	1.91	1.72	1.93
Current Assets Less Inventories/ Current liabilities ("Acid Test" Ratio)	0.87	0.87	0.94	0.94	0.94	1.01	0.93	1.03	0.95	0.97
Sales/Inventory	4.83	5.16	5.34	5.33	5.37	5.27	5.40	5.75	5.89	5.24
D. OTHER										
Interest paid/Total cost	2.70	3.03	2.18	2.09	2.08	2.07	2.03	1.71	1.67	1.31
Cash earnings/Sales	5.34	3.36	6.36	5.87	4.47	7.23	7.19	8.35	8.31	10.09

(1) Preliminary. (Actual annual data for 1981-84).

(2) Based on quarterly financial statistics of companies with assets of $10 million or more.

(3) By the Textile and Clothing Board.

SOURCE: Statistics Canada, Cat. 61-207 and 61-003 and CANSIM Matrices 4826, 4827, 5121 and 5122.

Table A-9

CLOTHING INDUSTRY SOME KEY FINANCIAL RATIOS, 1981-1988 1st Quarter

(in per cent unless otherwise indicated)

RATIO	1981	1982	1983	1984	1985[1]	1986		1987		1988
						From Quarterly Average[2]	Estimate[3]	From Quarterly Average[2]	Estimate[3]	First Quarter Average[2]
A. FINANCIAL STRUCTURE										
Fixed assets/Equity	27.46	31.93	26.24	29.20	25.93	23.33	22.46	22.31	21.48	28.72
Current liabilities/Equity	135.52	117.15	113.00	119.58	111.46	64.99	99.92	61.98	95.29	75.31
Long-term debt/Equity	9.64	11.59	9.69	12.33	8.60	6.45	8.32	5.81	7.50	14.61
B. PROFITABILITY										
Profits before tax/Capital employed	16.98	10.33	16.70	16.48	16.62	21.12	23.59	23.35	26.08	19.74
Profits after tax/Capital employed	11.63	7.68	12.70	12.69	12.58	13.59	17.38	13.93	17.80	11.16
Profits before tax/Total income	3.84	2.44	3.94	3.88	4.08	7.21	5.89	8.40	6.85	6.69
Profits after tax/Total income	2.63	1.81	3.00	2.99	3.09	4.65	4.34	4.99	4.66	3.78
Profits before tax/Equity	19.13	11.84	18.79	18.97	18.59	22.97	26.13	25.18	28.65	23.17
Profits after tax/Equity (return on investment	13.10	8.80	14.29	14.61	14.07	14.79	19.25	15.01	19.54	13.10
C. LIQUIDITY (Ratios)										
Current Assets/Current liabilities	1.56	1.63	1.69	1.64	1.70	2.26	1.86	2.32	1.91	2.10
Current Assets Less Inventories/ Current liabilities ("Acid Test" Ratio)	0.80	0.85	0.94	0.88	0.89	1.24	1.11	1.30	1.17	1.06
Sales/Inventory	4.74	5.26	5.51	5.33	4.98	4.73	5.64	4.71	5.61	4.41
D. OTHER										
Interest paid/Total cost	2.47	2.65	1.91	1.67	1.48	1.72	1.75	1.55	1.59	1.56
Cash earnings/Sales	3.60	2.91	3.98	4.08	4.23	5.90	5.34	6.01	5.44	4.97

(1) Preliminary. (Actual annual data for 1981-84).

(2) Based on quarterly financial statistics of companies with assets of $10 million or more.

(3) By the Textile and Clothing Board.

SOURCE: Statistics Canada, Cat. 61-207 and 61-003 and CANSIM Matrices 4826, 4827, 5121 and 5122.

ALL MANUFACTURING INDUSTRIES, SOME KEY FINANCIAL RATIOS, 1981-1988 1st Quarter
(in per cent unless otherwise indicated)

RATIO	1981	1982	1983	1984	1985(1)	1986 From Quarterly Average(2)	1986 Estimate(3)	1987 From Quarterly Average(2)	1987 Estimate(3)	1988 First Quarter Average(2)
A. FINANCIAL STRUCTURE										
Fixed assets/Equity	74.36	79.86	79.00	74.65	70.14	77.11	71.38	75.89	70.26	78.05
Current liabilities/Equity	67.47	63.96	61.64	60.01	59.91	46.95	54.65	46.71	54.37	48.04
Long-term debt/Equity	31.53	34.36	33.38	29.86	26.61	27.35	28.56	24.94	26.03	26.22
B. PROFITABILITY										
Profits before tax/Capital employed	11.91	3.60	6.72	11.00	9.61	11.10	8.54	13.54	10.42	14.50
Profits after tax/Capital employed	7.91	2.38	4.62	7.78	6.61	6.41	6.05	8.73	8.25	9.92
Profits before tax/Total income	6.09	4.96	3.55	5.51	5.02	6.74	4.71	8.34	5.82	8.73
Profits after tax/Total income	4.04	1.30	2.44	3.90	3.45	3.90	3.35	5.37	4.61	5.97
Profits before tax/Equity	17.35	5.35	9.91	15.72	13.42	16.05	12.12	19.36	14.62	21.08
Profits after tax/Equity (return on investment	11.52	3.54	6.81	11.12	9.23	9.26	8.59	12.48	11.58	14.42
C. LIQUIDITY (Ratios)										
Current Assets/Current liabilities	1.60	1.53	1.59	1.62	1.56	1.74	1.63	1.68	1.58	1.65
Current Assets Less Inventories/ Current liabilities ("Acid Test" Ratio)	0.79	0.77	0.85	0.88	0.90	1.01	0.94	1.01	0.94	0.97
Sales/Inventory	5.05	5.36	5.90	6.18	6.46	6.87	6.59	7.28	6.98	7.28
D. OTHER										
Interest paid/Total cost	2.67	3.16	2.47	2.15	1.88	2.01	1.96	1.79	1.75	1.72
Cash earnings/Sales	6.50	3.94	5.16	6.58	6.14	6.98	6.28	8.50	7.64	9.21

(1) Preliminary. (Actual annual data for 1981-84).

(2) Based on quarterly financial statistics of companies with assets of $10 million or more.

(3) By the Textile and Clothing Board.

SOURCE: Statistics Canada, Cat. 61-207 and 61-003 and CANSIM Matrices 4826, 4827, 5121 and 5122.

Table A-11

AVERAGE HOURLY EARNINGS* (IN CURRENT DOLLARS) IN THE TEXTILE AND CLOTHING INDUSTRIES AND IN TOTAL MANUFACTURING, 1980-1988, BY QUARTER, AND PERCENTAGE CHANGE FROM SAME PERIOD OF PREVIOUS YEAR

		Textiles		Clothing		All Manufacturing	
Year/Quarter		$	%	$	%	$	%
1980							
QUARTER	I	6.15	N/A	5.15	N/A	7.90	N/A
	II	6.24	N/A	5.24	N/A	8.03	N/A
	III	6.38	N/A	5.28	N/A	8.27	N/A
	IV	6.65	N/A	5.37	N/A	8.53	N/A
Year	1980	6.36	N/A	5.26	N/A	8.18	N/A
1981							
QUARTER	I	6.82	10.9	5.54	7.6	8.80	11.4
	II	6.92	10.9	5.64	7.6	9.07	13.0
	III	7.05	10.5	5.80	9.8	9.23	11.6
	IV	7.15	7.5	5.90	9.9	9.60	12.5
Year	1981	6.99	9.9	5.72	8.7	9.18	12.2
1982							
QUARTER	I	7.37	8.1	6.05	9.2	9.93	12.8
	II	7.72	11.6	6.19	9.8	10.17	12.1
	III	7.83	11.1	6.23	7.4	10.33	11.9
	IV	7.89	10.3	6.26	6.1	10.53	9.7
Year	1982	7.70	10.2	6.18	8.0	10.24	11.5
1983							
QUARTER	I	7.99	8.4	6.39	5.6	10.60	8.7
	II	7.89	2.2	6.42	3.7	10.50	3.2
	III	7.99	2.0	6.48	4.0	10.53	1.9
	IV	8.09	2.5	6.65	6.2	10.80	2.8
Year	1983	7.97	3.5	6.51	5.3	10.59	3.4
1984							
QUARTER	I	8.39	5.0	6.70	4.9	10.97	3.5
	II	8.45	7.1	6.60	2.8	11.10	5.7
	III	8.47	6.0	6.64	2.5	11.20	6.4
	IV	8.51	5.2	6.60	−0.8	11.30	4.6
Year	1984	8.46	6.2	6.64	2.0	11.14	5.2
1985							
QUARTER	I	8.74	4.2	6.68	−0.3	11.47	4.6
	II	8.71	3.1	6.88	4.2	11.50	3.6
	III	8.76	3.4	6.96	4.8	11.53	2.9
	IV	8.91	4.7	6.96	5.5	11.80	4.4
Year	1985	8.78	3.8	6.87	3.5	11.58	3.9
1986							
QUARTER	I	9.25	5.8	7.12	6.6	11.90	3.7
	II	9.19	5.5	7.10	3.2	11.83	2.9
	III	9.15	4.5	6.97	0.1	11.90	3.2
	IV	9.29	4.3	7.19	3.3	12.20	3.4
Year	1986	9.22	5.0	7.10	3.3	11.96	3.3
1987							
QUARTER	I	9.15	−1.1	7.44	4.5	12.20	2.5
	II	9.18	−0.1	6.78	−4.5	12.10	2.3
	III	9.25	1.1	7.29	4.6	12.20	2.5
	IV	9.38	1.0	7.42	3.2	12.47	2.2
Year	1987	9.24	0.2	7.23	1.8	12.24	2.3
1988							
	January	9.45	3.3	7.43	−0.1	12.60	3.3
	February	9.53	3.8	7.43	9.6	12.70	5.0
	March	9.83	4.1	7.44	2.1	12.70	4.1
	April	9.51	1.4	7.36	−0.8	12.70	1.8

* Data relate to employees paid by the hour and include overtime. Data have been adjusted to conform to the 1980 Standard Industrial Classification (SIC) definitions of these industries.

SOURCE: Statistics Canada, Cat. 72-002 and CANSIM Matrices 1435, 2932, 8005, and 8021.

Table A-12

COMPARISON BETWEEN AVERAGE WEEKLY EARNINGS* (IN CURRENT DOLLARS) IN THE TEXTILE AND CLOTHING INDUSTRIES AND IN TOTAL MANUFACTURING, by Quarter, 1980-1988

		Dollars			Per Cent		
		Textiles	Clothing	All Manufacturing	Textiles	Clothing	All Manufacturing
1980							
QUARTER	I	242.39	187.60	306.37	79.1	61.2	100.0
	II	238.73	187.65	309.13	77.2	60.7	100.0
	III	247.33	191.39	315.10	78.7	60.7	100.0
	IV	260.79	194.63	328.67	79.3	59.2	100.0
Year	1980	247.44	190.32	314.82	78.6	60.5	100.0
1981							
QUARTER	I	266.67	203.91	340.03	78.4	60.0	100.0
	II	270.66	205.18	351.50	77.0	58.4	100.0
	III	271.67	212.08	352.47	77.1	60.2	100.0
	IV	274.34	209.87	364.27	75.3	57.6	100.0
Year	1981	270.84	207.76	352.07	76.9	59.0	100.0
1982							
QUARTER	I	280.57	217.84	378.17	74.2	57.6	100.0
	II	285.66	214.27	382.97	74.6	55.9	100.0
	III	294.75	220.41	385.23	76.5	57.2	100.0
	IV	307.90	221.39	392.80	78.4	56.4	100.0
Year	1982	292.22	218.48	384.79	75.9	56.8	100.0
1983							
QUARTER	I	316.11	232.41	403.60	78.3	57.6	100.0
	II	309.53	228.68	402.10	77.0	56.9	100.0
	III	311.61	232.71	406.67	76.6	57.2	100.0
	IV	316.95	246.01	414.47	76.5	59.4	100.0
Year	1983	312.56	235.07	406.71	76.9	57.8	100.0
1984							
QUARTER	I	335.21	245.34	427.60	78.4	57.4	100.0
	II	331.32	234.97	430.20	77.0	54.6	100.0
	III	332.55	238.96	430.47	77.3	55.5	100.0
	IV	333.80	231.90	431.27	77.4	53.8	100.0
Year	1984	333.22	237.79	429.89	77.5	55.3	100.0
1985							
QUARTER	I	344.08	245.78	444.93	77.3	55.2	100.0
	II	347.14	254.19	448.73	77.4	56.6	100.0
	III	351.40	253.00	448.23	78.4	56.4	100.0
	IV	344.45	251.82	457.73	75.3	55.0	100.0
Year	1985	346.77	251.20	449.91	77.1	55.8	100.0
1986							
QUARTER	I	365.64	256.50	464.40	78.7	55.2	100.0
	II	358.35	252.11	460.37	77.8	54.8	100.0
	III	344.77	251.70	457.17	75.4	55.1	100.0
	IV	355.29	261.32	470.13	75.6	55.6	100.0
Year	1986	356.01	255.41	463.02	76.9	55.2	100.0
1987							
QUARTER	I	356.55	271.57	473.33	75.3	57.4	100.0
	II	357.45	265.48	471.87	75.8	56.3	100.0
	III	361.43	261.51	470.43	76.8	55.6	100.0
	IV	369.71	265.97	481.87	76.7	55.2	100.0
Year	1987	361.29	266.13	474.38	76.2	56.1	100.0
1988							
	January	375.51	270.10	491.90	76.3	54.9	100.0
	February	380.04	271.58	491.60	77.3	55.2	100.0
	March	379.84	273.72	495.50	76.7	55.2	100.0
	April	367.22	270.47	496.90	73.9	54.4	100.0

* Data relate to employees paid by the hour and include overtime. Data have been adjusted to conform to the 1980 Standard Industrial Classification (SIC) definitions of these industries.

SOURCE: Statistics Canada, Cat. 72-002 and CANSIM Matrices 2908, 2932, 8005 and 8009.

Table A-13

BROADWOVEN FABRIC[1] IMPORTS BY CATEGORY OF IMPORTERS, 1984-1987

Category of Importers	No. of Importers				Quantity (thousand pounds)				Value (thousand dollars)				Unit Value (dollars)				Per Cent of Total: Quantity				Per Cent of Total: Value			
	1984	1985	1986	1987	1984	1985	1986	1987	1984	1985	1986	1987	1984	1985	1986	1987	1984	1985	1986	1987	1984	1985	1986	1987
Clothing Manufacturers[2]	621	615	639	679	36,816	45,766	42,692	44,754	203,091	246,924	267,125	260,101	5.52	5.40	6.26	5.81	30.9	32.4	29.3	26.8	37.4	40.1	38.4	34.5
Importers/ wholesalers[3]	362	362	341	376	47,263	53,236	51,270	63,676	190,402	202,441	216,621	260,495	4.04	3.80	4.23	4.09	39.1	37.7	34.2	38.1	34.8	32.9	31.1	34.5
Furnishing Manufacturers[4]	247	270	254	299	10,057	9,495	10,729	12,306	46,246	48,693	58,329	64,220	4.60	5.15	5.44	5.21	8.4	6.7	7.4	7.4	8.5	7.9	8.4	8.5
Fabric Manufacturers[5]	46	45	52	57	6,305	10,559	16,558	15,029	20,132	29,436	46,467	42,638	3.19	2.79	2.92	2.63	5.2	7.5	11.4	9.0	3.7	4.8	7.0	5.7
Converters[6]	19	21	20	22	6,657	7,577	9,384	11,373	19,944	20,930	27,903	35,143	3.00	2.76	2.97	3.09	5.5	5.4	6.4	6.8	3.7	3.4	4.0	4.7
Others	409	497	527	712	8,914	13,791	13,206	13,613	41,401	63,875	71,371	72,482	4.64	4.63	5.40	5.32	7.4	9.8	9.1	8.2	7.6	10.4	10.2	9.6
Unidentifiable	174	67	93	148	4,087	841	1,727	6,225	23,805	3,169	6,715	19,152	5.62	3.76	3.89	3.07	3.4	0.5	1.2	3.7	4.4	0.5	0.9	2.5
TOTAL	**1,878**	**1,897**	**1,926**	**2,293**	**120,120**	**141,265**	**145,566**	**188,978**	**545,021**	**615,668**	**896,531**	**754,231**	**4.54**	**4.35**	**4.78**	**4.51**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

(1) Cotton, wool, man-made broadwovens.
(2) Firms importing fabrics for use in the clothing manufacturing process.
(3) Firms importing fabrics for resale.
(4) Manufactures of curtains, draperies, bedding, linens, various other home furnishings; also, makers of furniture, upholsterers (excl. automotive), and interior decorators.
(5) Weavers of fabrics who also import.
(6) Firms importing fabrics for further processing as fabrics.

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

Table A-14

IMPORTS BY CATEGORY OF IMPORTERS BY CONTROL NUMBER IN UNITS OF CLOTHING 1978 – 1987

Firms importing 1000 units or more

		CONTROL CATEGORY																
		32	37	38	39	40	41	42	43	44	45	46	47	48	49	50		
Year	No. of Firms	Winter Outerwear	Pants Slacks	Unstructured Suits	Blouses	Pyjamas and Sleepwear	Raincoats	Dresses, Skirts, Coordinates, Ladies Suits	Foundation Garments	Swimsuits	Underwear	Outer Jackets, Topcoats	Structured Suits, Sportcoats Blazers	Leather Jackets	Tailored Collar Shirts	Sweaters	Total for Category of Importer	Per Cent of Imports
CLOTHING MANUFACTURERS																		
1978	178	225,419	4,100,816	62,155	7,071,196	931,346	70,613	1,472,890	1,235,148	881,700	3,289,898	861,481	32,917	1,452	2,492,721	1,972,161	24,522,115	16.4
1979	200	453,240	4,353,330	85,236	6,601,687	1,092,645	195,113	1,547,109	1,446,160	721,886	4,125,717	1,011,197	197,638	7,501	2,670,640	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	2,466,816	1,097,279	66,368	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	2,268,395	1,427,700	467,026	3,058,105	1,684,663	89,948	included	4,095,421	3,749,721	26,875,886	18.8
1982	274	304,251	3,542,217	in	6,749,040	1,071,741	131,126	1,920,954	1,078,656	431,361	3,184,364	2,569,590	307,570	in	6,267,293	4,213,001	31,771,184	20.6
1983	299	263,750	5,141,771	42	9,689,628	1,626,061	134,037	3,407,718	2,124,984	678,686	3,900,615	2,661,995	173,753	46	6,192,863	5,030,373	41,006,834	21.9
1984	325	294,686	5,525,162		11,171,985	2,124,237	130,959	5,353,199	2,311,068	913,702	4,342,702	3,807,267	186,005		5,698,221	4,676,544	46,533,777	21.0
1985	319	373,735	5,611,825		11,222,551	2,053,042	166,866	5,241,341	2,093,712	964,261	5,638,517	3,952,322	185,013		7,723,482	4,040,225	49,466,892	21.7
1986	346	511,015	6,283,294		11,430,631	2,474,732	131,282	5,973,331	3,048,552	450,637	7,192,070	3,845,347	213,944		7,426,378	4,146,494	53,129,687	21.6
1987	379	416,170	7,094,719		11,166,226	2,740,689	477,821	7,895,369	3,136,956	864,918	5,754,550	4,629,330	220,183		8,745,408	5,721,048	58,863,187	22.9
RETAILERS																		
1978	274	174,408	3,135,783	38,659	4,998,587	686,550	95,065	1,641,247	189,360	288,834	1,428,402	581,632	88,184	16,873	1,650,458	3,139,107	18,153,167	12.1
1979	296	370,666	2,863,155	36,573	5,800,185	986,422	57,536	2,231,659	261,336	272,952	1,317,168	569,851	42,634	17,290	2,155,960	3,832,977	20,638,386	13.4
1980	354	349,042	2,474,237	now	5,062,746	801,485	68,558	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	28,041,759	16.9
1982	418	207,769	2,686,910	in	6,687,099	930,852	136,835	2,199,671	140,304	388,191	1,485,637	1,264,078	70,887	in	2,046,124	4,359,164	22,603,521	14.7
1983	407	315,709	3,064,041	42	7,083,997	1,065,751	147,589	2,966,601	174,816	257,679	2,272,962	1,381,280	67,424	46	2,533,721	5,328,359	26,879,929	14.2
1984	465	270,693	4,209,594		10,845,575	1,586,694	143,579	4,001,415	201,312	461,120	2,498,488	1,912,088	112,621		2,574,493	6,264,350	35,062,022	15.8
1965	453	217,814	4,348,501		10,264,125	2,318,040	134,930	4,633,752	190,904	630,958	3,101,556	1,868,644	174,129		2,654,160	6,667,219	37,224,232	16.3
1986	554	229,101	4,931,270		12,574,360	1,845,316	153,420	5,691,539	357,012	862,736	2,327,473	1,618,661	211,388		3,023,211	8,022,105	41,827,592	17.0
1987	579	142,601	5,467,537		13,579,267	1,315,521	272,311	5,022,837	660,706	791,481	1,630,201	1,494,603	166,684		2,833,407	6,134,156	41,511,314	16.2
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	458,888	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	5,527,693	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	828,317	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	448	816,401	12,278,254	in	24,712,002	2,485,360	670,239	7,731,038	126,860	2,124,738	8,078,333	4,061,055	166,194	in	7,171,601	9,626,473	80,050,568	52.0
1983	484	884,748	16,383,373	42	26,047,595	3,021,711	997,367	11,842,367	155,256	2,914,201	7,844,208	4,210,168	131,617	46	7,902,907	11,802,609	94,138,127	50.2
1984	575	854,545	20,306,703		38,446,669	3,592,194	1,278,867	14,821,845	206,340	4,650,300	9,363,951	5,860,371	293,753		7,816,241	14,920,615	122,432,394	55.3
1985	569	778,571	14,861,763		35,444,277	4,151,535	563,923	13,490,211	731,448	4,602,667	11,109,898	5,085,440	257,449		10,140,255	16,350,806	117,568,243	51.5
1986	726	791,556	22,503,940		42,245,671	3,986,993	539,035	18,134,778	979,140	4,831,103	11,871,403	5,992,445	471,662		13,346,555	21,459,082	147,083,563	59.8
1987	811	838,210	22,043,792		43,440,717	4,993,064	1,000,853	19,860,190	1,081,548	4,429,269	13,125,096	5,936,771	417,896		12,646,677	21,654,213	151,490,298	59.0
OTHER																		
1978	566	141,786	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	86,161	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	8,101,113	478,841	183,991	2,837,862	93,120	56,309	924,152	878,824	35,859	included	1,640,762	3,199,691	19,564,294	12.7
1982	677	216,735	3,854,291	in	5,864,465	205,159	161,047	2,072,917	85,296	45,485	902,690	1,414,003	58,968	in	1,910,647	2,919,024	19,530,727	12.7
1983	860	111,310	4,507,616	42	6,268,864	304,436	388,479	2,706,139	194,844	287,735	1,582,494	1,536,806	39,994	46	2,268,465	3,461,997	25,657,179	13.7
1984	611	80,580	2,098,255		5,020,410	77,179	736,879	2,502,109	304,776	442,578	2,237,405	1,266,334	50,531		1,051,361	1,603,546	17,453,923	7.9
1965	603	79,618	4,142,955		6,739,623	349,177	337,956	3,767,528	330,408	611,269	2,783,565	1,146,025	26,623		1,543,391	2,292,246	24,130,384	10.6
1986	529	11,108	403,957		842,264	70,822	630,957	721,628	43,224	34,295	380,112	224,754	20,737		287,411	326,574	4,035,643	1.6
1987	586	18,069	672,301		1,048,289	119,500	465,711	820,942	44,292	9,246	745,328	218,684	25,752		264,612	461,501	4,914,227	1.9

SOURCE: Textile and Clothing Board and External Trade Division, Statistics Canada. 1982 data revised by Statistics Canada.

IMPORTS BY CATEGORY OF IMPORTERS BY CONTROL NUMBER
1978 - 1987
IN THOUSANDS OF CANADIAN DOLLARS F.O.B. COUNTRY OF EXPORT
Firms importing 1000 units or more

		CONTROL CATEGORY																
		32	37	38	39	40	41	42	43	44	45	46	47	48	49	50		
Year	No. of Firms	Winter Outerwear	Pants Slacks	Unstructured Suits	Blouses	Pyjamas and Sleepwear	Raincoats	Dresses, Skirts, Coordinates, Ladies Suits	Foundation Garments	Swimsuits	Underwear	Outer Jackets, Topcoats	Structured Suits, Sportcoats Blazers	Leather Jackets	Tailored Collar Shirts	Sweaters	Total for Category of Importer[1]	Per Cent of Imports
CLOTHING 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	7,148	8,925	88,479	18.3
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	10,576	120,333	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	12,841	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	157,686	21.5
1982	274	4,805	19,928	in	29,832	4,406	2,062	20,936	1,652	1,435	2,026	31,007	9,041	in	27,382	27,207	181,917	23.5
1983	299	3,891	28,024	42	42,022	7,282	1,721	30,702	3,267	1,770	2,347	32,466	6,059	46	26,289	30,384	216,226	23.0
1984	325	5,576	34,259		52,510	9,825	1,122	42,390	3,693	2,497	2,799	50,247	6,220		27,812	34,197	273,147	21.4
1985	319	7,005	35,101		48,382	9,468	1,173	39,936	3,108	2,910	3,236	47,018	6,087		37,609	29,168	270,202	20.9
1986	346	10,793	38,549		51,716	13,446	1,579	49,350	3,990	1,780	4,521	51,283	6,092		36,848	37,424	307,307	19.5
1987	379	10,430	46,156		57,969	17,162	6,843	69,816	4,791	3,178	4,024	70,732	6,552		48,435	54,237	400,325	22.4
RETAILERS																		
1978	274	1,861	11,091	483	12,412	2,576	588	15,054	495	686	1,474	6,858	2,592	1,852	4,892	16,519	79,410	18.4
1979	296	5,141	11,391	549	18,303	4,140	665	19,025	710	846	1,462	9,332	1,198	1,679	7,906	21,241	103,788	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	418	3,977	13,703	in	26,056	4,385	877	22,948	550	1,042	2,036	19,405	2,241	in	10,159	30,997	138,376	17.9
1983	407	4,505	16,939	42	30,123	5,507	933	31,340	697	896	2,650	22,833	2,933	46	12,543	38,256	170,155	18.1
1984	465	6,599	28,881		52,387	7,930	1,181	48,978	854	1,747	3,000	34,946	6,164		14,348	57,007	283,983	20.7
1985	453	5,690	32,195		50,006	10,887	902	50,059	839	2,046	2,878	35,875	9,941		16,030	55,642	272,991	21.1
1986	554	6,690	36,980		66,768	10,356	1,314	69,635	1,613	3,099	3,840	36,278	15,437		20,239	76,436	350,685	22.2
1987	579	4,477	45,887		78,196	9,476	3,039	89,414	2,458	2,868	3,125	39,714	14,876		19,118	88,733	379,560	21.2
IMPORTERS/WHOLESALERS																		
1978	310	9,937	39,003	2,447	64,050	8,141	3,410	32,858	252	2,226	3,926	13,700	10,945	468	20,384	44,799	254,526	52.6
1979	341	18,897	47,669	2,959	70,389	9,415	4,350	39,654	1,036	3,325	4,648	23,218	14,912	459	24,678	38,338	304,146	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	9,586	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	448	11,378	59,628	in	72,228	7,347	2,374	48,264	681	3,895	5,042	39,226	6,177	in	26,730	54,050	337,017	43.5
1983	484	13,451	80,672	42	80,970	9,814	2,952	71,909	879	6,380	8,056	38,095	4,245	46	28,705	67,052	411,180	43.8
1984	575	14,033	107,697		132,518	11,809	3,636	110,367	1,184	10,554	7,606	65,245	9,567		33,432	105,348	612,997	48.0
1985	569	13,871	92,186		132,471	14,683	2,361	99,846	2,190	9,420	8,045	61,422	9,083		45,629	110,953	601,983	46.6
1986	728	17,190	139,597		187,952	16,375	2,655	158,558	3,887	10,282	11,839	77,637	14,132		61,609	177,853	879,345	55.6
1987	811	18,703	143,457		192,116	20,908	6,065	184,049	4,129	10,667	12,673	89,678	15,815		59,300	196,873	954,433	53.4
OTHER																		
1978	566	2,178	6,018	496	13,081	595	660	15,303	470	418	1,353	4,413	2,123	671	2,878	11,227	81,884	12.8
1979	850	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	60,249	13.2
1980	858	1,334	13,372	now	14,159	801	672	17,352	338	236	988	7,164	1,192	now	6,080	13,427	77,295	13.1
1981	709	1,984	18,325	included	23,267	760	900	24,991	350	220	1,102	8,546	1,453	included	7,858	18,864	108,600	14.6
1982	677	3,872	21,006	in	23,035	944	1,040	23,235	375	195	992	14,610	1,666	in	8,900	16,281	116,570	15.1
1983	660	1,829	26,297	42	31,083	1,113	1,104	25,401	829	744	1,542	18,094	1,835	46	10,789	20,836	141,498	15.1
1984	811	2,027	16,575		24,548	638	1,623	28,106	951	828	1,983	23,771	2,071		6,202	16,446	125,769	9.9
1985	603	2,421	24,834		27,909	1,744	1,046	33,403	1,077	1,268	2,614	19,514	1,655		8,517	21,529	147,530	11.4
1986	529	671	4,933		5,917	780	1,065	10,985	319	302	653	6,722	1,220		2,801	6,000	42,077	2.7
1987	566	1,082	8,353		7,679	1,447	2,290	10,231	240	121	1,060	7,424	1,819		2,940	8,176	53,063	3.0

(1) Totals may not add due to rounding.

SOURCE: Textile and Clothing Board and External Trade Division, Statistics Canada. 1982 data revised by Statistics Canada.

IMPORTS BY CATEGORY OF IMPORTERS BY CONTROL NUMBER
1978 – 1987
AVERAGE VALUES IN CANADIAN DOLLARS F.O.B. COUNTRY OF EXPORT

Firms importing 1000 units or more

		CONTROL CATEGORY															
		32	37	38	39	40	41	42	43	44	45	46	47	48	49	50	
Year	No. of Firms	Winter Outerwear	Pants Slacks	Unstructured Suites	Blouses	Pyjamas and Sleepwear	Raincoats	Dresses, Skirts, Coordinates, Ladies Suits	Foundation Garments	Swimsuits	Underwear	Outer Jackets, Topcoats	Structured Suits, Sportcoats Blazers	Leather Jackets	Tailored Collar Shirts	Sweaters	Total for Category of Importer
CLOTHING MANUFACTURERS																	
1978	178	12.16	6.06	9.85	2.61	3.04	9.16	8.56	1.72	2.25	0.44	9.49	15.68	41.32	2.87	4.53	3.60
1979	200	15.00	5.96	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	4.46
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	6.61	1.90	3.66	0.71	12.60	24.35	included	4.65	6.50	5.46
1982	274	15.79	5.63	in	4.42	4.11	15.72	10.90	1.72	3.41	0.64	12.07	29.40	in	4.37	6.46	5.73
1983	299	14.75	5.45	42	4.35	4.48	12.84	9.01	1.54	2.61	0.60	12.20	34.87	46	4.24	6.04	5.27
1984	325	16.92	6.20		4.70	4.83	8.56	7.92	1.60	2.73	.64	13.20	33.44		4.88	7.31	5.67
1985	319	18.74	6.25		4.31	4.81	7.03	7.62	1.48	3.02	.55	11.90	32.90		4.67	7.22	5.46
1986	348	21.20	6.14		4.52	5.43	12.03	8.26	1.31	3.95	.63	13.34	28.46		4.96	9.02	5.79
1987	379	25.06	6.51		5.19	6.26	14.33	8.84	1.53	3.67	.70	15.28	29.76		5.54	9.48	6.80
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	298	13.67	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	4.96
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	6.56	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	27.86	included	4.61	6.89	5.94
1982	418	19.14	5.10	in	3.90	4.71	6.41	10.43	3.92	2.69	1.37	15.35	31.61	in	4.96	7.11	6.12
1983	407	14.27	5.53	42	4.25	5.17	6.72	10.49	3.99	3.48	1.17	16.53	43.50	46	4.95	7.18	6.38
1984	485	24.23	6.86		4.83	5.06	8.22	12.24	4.24	3.79	1.20	18.26	54.74		5.57	9.10	7.53
1985	453	26.12	7.40		4.87	4.70	6.68	10.60	4.41	3.24	.93	19.20	57.09		6.04	8.32	7.33
1986	554	29.20	7.90		5.31	5.81	8.56	12.23	4.52	3.59	1.65	22.41	73.03		8.69	9.55	8.38
1987	579	31.40	6.39		5.76	7.20	11.16	13.62	3.72	3.62	1.92	25.37	89.26		6.75	10.91	9.14
IMPORTERS/WHOLESALERS																	
1978	310	11.03	2.95	12.11	1.88	2.38	3.43	6.03	2.29	2.03	0.69	6.69	26.48	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	2.08	0.68	6.65	30.76	60.32	2.79	3.66	3.43
1980	349	13.38	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	389	12.67	4.56	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	448	13.93	4.86	in	2.92	2.98	3.54	6.24	5.28	1.83	0.62	9.66	37.16	in	3.73	5.61	4.21
1983	484	15.20	4.92	42	3.11	3.25	2.96	8.07	5.86	2.19	0.77	9.05	32.25	46	3.63	5.68	4.37
1984	575	16.42	5.30		3.45	3.29	2.84	7.45	5.74	2.27	.81	11.13	32.57		4.28	7.06	5.01
1985	569	17.56	6.20		3.74	3.54	4.22	7.40	2.99	2.05	.72	12.08	35.28		4.50	6.79	5.12
1986	728	21.72	6.20		4.45	4.11	4.92	8.74	3.97	2.12	1.00	13.11	29.95		4.62	8.28	5.96
1987	811	22.31	6.51		4.42	4.19	6.06	9.26	3.82	2.41	.98	15.10	37.37		4.69	9.09	6.30
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	2.76	0.82	9.91	32.72	now	4.43	5.16	5.17
1981	709	16.45	5.70	included	3.61	1.59	4.89	9.47	3.75	3.90	1.19	9.72	40.53	included	4.79	5.90	5.55
1982	677	17.86	5.75	in	3.93	4.60	5.74	11.21	4.40	4.29	1.10	10.47	31.98	in	4.86	5.58	5.97
1983	860	16.43	5.83	42	3.76	3.65	2.84	9.39	4.26	2.59	0.97	11.77	45.89	46	4.76	6.02	5.51
1984	611	33.46	7.90		4.89	8.26	2.20	11.23	3.12	1.67	.89	16.74	40.99		5.90	10.26	7.21
1985	603	30.41	5.99		4.14	5.00	3.10	8.87	3.26	2.07	.95	17.03	62.18		5.52	9.39	6.11
1986	529	60.38	12.21		7.03	11.05	1.89	14.30	7.39	8.80	1.72	30.17	58.85		9.05	16.37	10.43
1987	566	59.87	12.42		7.52	12.11	4.92	12.48	5.41	13.05	1.42	33.95	70.64		11.11	17.72	10.60

SOURCE: Textile and Clothing Board and External Trade Division, Statistics Canada. 1982 Statistics Canada Revision.

Table A-17

SUMMARY
TOTAL IMPORTS BY CONTROL NUMBER
1978 – 1987
Firms importing 1000 units or more

		CONTROL CATEGORY																
		32	37	38	39	40	41	42	43	44	45	46	47	48	49	50		
Year	No. of Firms	Winter Outerwear	Pants Slacks	Unstructured Suits	Blouses	Pyjamas and Sleepwear	Raincoats	Dresses, Skirts, Coordinates, Ladies Suits	Foundation Garments	Swimsuits	Underwear	Outer Jackets, Topcoats	Structured Suits, Sportcoats Blazers	Leather Jackets	Tailored Collar Shirts	Sweaters	Total for Category of Importer(1)	of Change
									TOTAL UNITS									
1978	1,329	1,442,353	21,841,622	352,756	52,396,823	4,318,252	1,469,378	10,629,366	1,675,388	2,381,950	12,062,467	3,839,185	609,337	31,631	13,790,018	22,573,915	149,412,241	n.a.
1979	1,487	2,275,546	22,242,913	449,817	50,626,182	5,915,240	1,817,458	13,321,468	2,309,856	2,715,344	13,534,388	4,905,171	776,653	41,828	15,520,735	19,267,762	155,520,341	+ 4.1
1980	1,583	1,400,034	19,936,227	now	37,015,863	3,782,804	1,640,102	10,685,119	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
1961	1,689	1,392,129	23,143,287	included	45,809,211	4,878,900	1,356,335	14,007,001	1,964,608	2,847,983	13,810,845	7,354,577	381,945	included	14,944,600	21,867,178	153,756,800	+16.5
1982	1,617	1,545,156	22,161,872	in	44,012,606	4,692,912	1,119,247	13,924,580	1,433,138	2,989,775	13,651,224	9,308,726	603,619	in	17,395,665	21,117,662	153,955,980	neg
1983	1,850	1,575,517	29,096,801	42	51,068,284	6,017,959	1,687,472	20,942,825	2,649,900	4,138,501	15,600,479	9,790,249	412,786	46	18,897,956	25,623,338	187,482,069	+21.8
1984	1,976	4,804,844	32,139,934		85,484,839	7,360,304	2,290,284	26,678,566	3,023,498	6,467,700	18,462,546	12,848,080	642,910		17,138,316	27,465,055	221,482,116	+18.1
1985	1,944	1,449,738	28,965,044		63,670,578	8,671,794	1,203,675	27,132,832	3,348,472	6,809,155	22,813,538	12,052,431	643,214		22,061,288	29,370,496	226,389,751	+ 3.1
1986	2,157	1,542,780	34,122,461		67,092,928	8,377,663	1,454,674	30,561,276	4,427,928	6,178,771	21,771,058	11,609,207	917,931		24,083,555	33,936,255	246,076,485	+ 7.7
1987	2,335	1,415,050	35,276,349		69,234,499	9,168,774	2,216,496	33,619,336	4,923,504	6,094,914	21,255,177	22,281,388	830,515		24,490,104	35,970,918	256,779,026	+ 4.3
									TOTAL VALUE ($'000) CANADIAN F.O.B. COUNTRY OF EXPORT									
1978	1,328	16,714	80,981	4,040	107,967	12,140	5,267	72,882	3,338	5,318	8,214	31,436	16,182	3,051	35,280	81,470	484,302	n.a.
1979	1,487	33,046	94,219	6,258	130,510	17,949	6,976	90,900	5,167	6,720	9,341	51,471	21,525	3,252	50,252	80,930	608,517	+25.6
1980	1,583	20,301	96,570	now	109,945	13,616	9,309	90,829	4,357	7,335	8,876	56,603	19,280	now	54,320	97,634	589,175	− 3.2
1981	1,689	19,875	118,334	included	146,833	17,101	6,294	115,549	4,662	7,042	10,632	78,740	12,994	included	62,998	130,622	733,775	+24.5
1982	1,817	24,030	114,263	in	151,151	17,062	6,353	115,383	3,458	6,567	10,096	104,448	19,345	in	73,171	128,535	773,882	+ 5.5
1983	1,850	23,876	151,932	42	184,198	23,716	8,710	159,352	5,672	9,790	12,595	111,490	15,072	46	78,328	156,530	939,059	+21.3
1984	1,976	26,195	187,392		261,963	30,202	7,562	229,841	6,682	15,626	15,390	174,209	24,022		81,794	212,996	1,275,878	+35.9
1985	1,944	28,787	184,318		258,768	36,782	5,502	223,244	6,214	15,644	16,773	163,829	26,766		107,785	217,292	1,292,706	+ 1.3
1986	2,157	35,343	222,059		3,12,353	40,958	6,612	286,438	9,809	15,442	20,852	171,919	36,881		121,296	297,513	1,579,477	+22.2
1987	2,335	34,692	243,833		338,160	46,994	18,237	333,510	11,617	16,633	21,083	205,748	38,864		1269,792	348,019	1,787,361	+13.2

n.a. – Not available

neg – negligible

(1) Totals may not add due to rounding.

SOURCE: Textile and Clothing Board and External Trade Division; Statistics Canada. 1982 Statistics Canada Revisions.

Table A-18

APPARENT CANADIAN MARKET
ALL CLOTHING SUBJECT TO RESTRAINT MEASURES, 1975, 1981-1987

CONTROL NOS. 32, 37-50

	1975	1981	1982	1983	1984	1985	1986	1987
				— Thousand garments —				
Total Shipments	345,834	372,876	336,112	338,500	339,724	355,592	381,327	392,903
Less Exports	3,531	4,383	4,606	4,426	4,998	5,137	6,387	10,638
Domestic Shipments	342,303	368,493	331,506	334,074	334,726	350,455	374,940	382,265
Imports	180,933	165,489	166,402	202,453	237,277	246,989	267,051	274,635
of which 'Low-Cost'	(151,726)	(146,078)	(148,698)	(184,683)	(213,941)	(219,538)	(237,696)	(249,057)
Apparent Canadian Market	523,236	533,982	497,908	536,527	572,003	597,444	641,991	656,900
Share of market held by:				— Per cent —				
Domestic Shipments	65	69	67	62	59	59	58	58
Imports	35	31	33	38	41	41	42	42
of which 'Low-Cost'	(29)	(27)	(30)	(34)	(37)	(37)	(37)	(38)

SOURCE: Total shipments: Estimates by the Textile and Clothing Board for 1987; Statistics Canada, Census of Manufactures for other years.
Imports and Exports: Statistics Canada, External Trade Division.

Table A-19

APPARENT CANADIAN MARKET
ALL CLOTHING SUBJECT TO RESTRAINT MEASURES 1981-1987

CONTROL NOS. 32, 37-50

	1981	1982	1983	1984	1985	1986	1987
				— Thousand dollars —			
Total Shipments	3,543,655	3,398,647	3,588,404	3,714,402	4,076,145	4,519,734	4,760,825
Less Exports	77,811	84,405	83,588	105,065	114,977	131,700	176,275
Domestic Shipments	3,465,844	3,314,242	3,504,816	3,609,337	3,961,168	4,388,034	4,584,550
Imports[1]	820,417	858,834	1,048,451	1,402,508	1,454,467	1,783,247	1,974,716
of which 'Low-Cost'	(658,844)	(699,770)	(870,586)	(1,161,740)	(1,141,381)	(1,373,049)	(1,574,311)
Apparent Canadian Market	4,286,261	4,173,076	4,553,267	5,011,845	5,415,635	6,171,281	6,559,266
Share of market held by:				— Per cent —			
Domestic Shipments	81	79	77	72	73	71	70
Imports	19	21	23	28	27	29	30
of which 'Low-Cost'	(15)	(17)	(19)	(23)	(21)	(22)	(24)

(1) F.o.b. value.

SOURCE: Total shipments: Estimates by the Textile and Clothing Board for 1987; Statistics Canada, Census of Manufactures for other years.
Imports and Exports: Statistics Canada, External Trade Division.

Table A-20

PERSONAL EXPENDITURES ON CONSUMER GOODS AND SERVICES, 1981-87
MILLIONS OF CURRENT DOLLARS AND PERCENTAGE DISTRIBUTION

	1981		1982		1983		1984		1985		1986		1987	
Expenditure Category	**$Million**	**%**	**$Million**	**%**	**$Million**	**%**	**$Million**	**%**	**$Million**	**%**	**$Million**	**%**	**$Million**	**%**
Food, Beverages and Tobacco	36,335	18.5	39,291	18.7	41,695	18.0	44,478	17.7	47,598	17.3	50,840	17.1	54,176	16.8
CLOTHING	10,798	5.5	11,011	5.2	11,884	5.1	12,936	5.1	14,215	5.2	15,452	5.2	16,599	5.1
Footwear	2,039	1.0	1,985	0.9	2,100	0.9	2,289	0.9	2,467	0.9	2,687	0.9	2,848	0.9
Gross Rent, Fuel & Power	40,651	20.7	47,279	22.5	52,247	22.6	56,057	22.3	60,411	22.0	64,394	21.7	68,250	21.1
Furniture, Furnishings, etc.	18,794	9.6	18,895	9.0	20,878	9.0	22,877	9.1	24,878	9.0	27,551	9.3	30,516	9.4
Medical Care & Health Services	7,155	3.7	7,965	3.8	9,132	3.9	10,314	4.1	11,206	4.1	12,160	4.1	13,298	4.1
Transportation & Communications	29,615	15.1	30,469	14.5	33,713	14.6	37,757	15.0	43,004	15.6	45,620	15.3	49,230	15.2
Recreation, Education, etc.	20,137	10.3	21,252	10.1	23,439	10.1	26,235	10.4	28,476	10.4	31,570	10.6	34,638	10.7
Personal Goods and Services	30,250	15.4	31,745	15.1	34,917	15.1	37,439	14.9	41,572	15.1	46,911	15.8	52,092	16.1
Net Expenditures Abroad	417	0.2	617	0.2	1,447	0.7	1,263	0.5	1,119	0.4	119	0.0	1,323	0.6
TOTAL	**196,191**	**100.0**	**210,509**	**100.0**	**231,452**	**100.0**	**251,645**	**100.0**	**274,946**	**100.0**	**297,304**	**100.0**	**322,970**	**100.0**

SOURCE: Statistics Canada, Income and Expenditure Accounts Division and Cat. No. 13-531 Occasional.

Table A-21

PERSONAL EXPENDITURES ON CONSUMER GOODS AND SERVICES, 1981-87
MILLIONS OF CONSTANT (1981) DOLLARS AND PERCENTAGE DISTRIBUTION

	1981		1982		1983		1984		1985		1986		1987	
Expenditure Category	**$Million**	**%**	**$Million**	**%**	**$Million**	**%**	**$Million**	**%**	**$Million**	**%**	**$Million**	**%**	**$Million**	**%**
Food, Beverages and Tobacco	36,335	18.5	35,865	18.8	36,026	18.2	36,132	17.5	37,057	17.0	37,028	16.3	37,687	15.8
CLOTHING	10,798	5.5	10,338	5.4	10,684	5.4	11,317	5.5	12,039	5.5	12,749	5.6	13,153	5.5
Footwear	2,039	1.0	1,877	1.0	1,920	1.0	2,053	1.0	2,159	1.0	2,297	1.0	2,338	1.0
Gross Rent, Fuel and Power	40,651	20.7	42,291	22.1	43,453	22.0	45,061	21.8	46,799	21.5	48,496	21.3	50,344	21.2
Furniture, Furnishings, etc.	18,794	9.6	17,322	9.1	18,210	9.2	19,384	9.4	20,558	9.4	21,968	9.7	23,493	9.9
Medical Care & Health Services	7,155	3.7	7,025	3.7	7,510	3.8	8,042	3.9	8,321	3.8	8,605	3.8	8,820	3.7
Transportation & Communications	29,615	15.1	26,700	14.0	28,238	14.3	30,675	14.8	33,756	15.5	35,363	15.6	37,259	15.7
Recreation, Education, etc.	20,137	10.3	19,866	10.4	20,865	10.6	22,725	11.0	24,021	11.0	25,791	11.4	27,290	11.5
Personal Goods and Services	30,250	15.4	28,906	15.1	29,139	14.8	30,162	14.6	32,395	14.9	34,832	15.3	36,512	15.3
Net Expenditures Abroad	417	0.2	783	0.4	1,501	0.7	1,113	0.5	754	0.3	35	0.0	1,034	0.4
TOTAL	**196,191**	**100.0**	**190,993**	**100.0**	**197,546**	**100.0**	**206,664**	**100.0**	**217,859**	**100.0**	**227,164**	**100.0**	**237,930**	**100.0**

SOURCE: Statistics Canada, Income and Expenditure Accounts Division and Cat. No. 13-531 Occasional.

Table A-22

RETAIL SALES OF CLOTHING, 1981-1987
ANNUAL SALES AND PERCENTAGE CHANGE FROM PREVIOUS YEAR

Types of Store	Sales (Millions of Dollars) 1981	1982	1983	1984	1985	1986	1987	Percentage Change 1982/81	1983/82	1984/83	1985/84	1986/85	1987/86
							(Current Dollars)						
Department stores	3,064.2	3,097.8	3,278.5	3,509.1	3,782.2	4,114.5	4,265.2	1.1	5.8	7.0	7.8	8.8	3.7
Specialized clothing stores:													
– chain	2,183.0	2,295.0	2,861.1	3,249.1	3,754.0	4,201.6	4,662.9	5.1	24.7	13.6	15.5	11.9	11.0
– independent	2,069.4	2,006.9	2,012.7	2,046.2	2,214.7	2,351.2	2,420.5	−3.0	0.3	1.7	8.2	6.2	2.9
TOTAL	**7,316.6**	**7,399.7**	**8,152.3**	**8,804.4**	**9,750.9**	**10,667.3**	**11,348.6**	**1.1**	**10.2**	**8.0**	**10.8**	**9.4**	**6.4**
							(Constant Dollars)						
Department stores	3,064.2	2,934.2	2,984.8	3,118.8	3,270.9	3,462.9	3,445.7	−4.2	1.7	4.5	4.9	5.9	−0.5
Specialized clothing stores:													
– chain	2,183.0	2,173.8	2,604.8	2,887.6	3,246.4	3,536.2	3,767.0	−0.4	19.8	10.9	12.4	8.9	6.5
– independent	2,069.4	1,900.9	1,832.3	1,818.5	1,915.3	1,978.9	1,955.4	−8.1	−3.6	−0.8	5.3	3.3	−1.2
TOTAL	**7,316.6**	**7,008.9**	**7,421.9**	**7,824.9**	**8,432.6**	**8,978.0**	**9,168.1**	**−4.2**	**5.9**	**5.4**	**7.8**	**6.5**	**2.1**

SOURCE: Statistics Canada, Cat. Nos. 62-001, 63-002 and 63-005.

Table A-23

BANGLADESH
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	–	–	–	–	–	–	–	–	–	–
37 Pants, Shorts, Overalls	–	–	–	–	–	–	–	–	87	87
39 Blouses and Shirts	–	–	–	–	–	–	–	–	–	–
40 Sleepwear	–	–	–	–	–	–	–	–	–	–
42 Sportswear	–	–	–	–	–	–	–	–	–	–
43 Foundation Garments	–	–	–	–	–	–	–	–	–	–
44 Swimwear	–	–	–	–	–	–	–	–	–	–
45 Underwear	–	–	–	–	–	–	–	–	–	–
46 Jackets, Coats, Rainwear	–	–	–	–	–	–	90	90	51	49
47 Fine Suits, Blazers	–	–	–	–	–	–	–	–	–	–
49 Tailored Collar Shirts	–	–	–	–	–	–	53	53	114	100
50 Sweaters	–	–	–	–	–	–	–	–	–	–
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	–	–	–	–	–	–	70	70	90	83
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	–	–	–	–	–	–	–	–	–	–
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	–	–	–	–	–	–	–	–	–	–
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	–	–	–	–	–	–	–	–	–	–

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint

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

Table A-24

BRAZIL
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	–	–	–	–	–	–	–	–	–	–
37 Pants, Shorts, Overalls	–	–	–	–	–	–	–	–	–	–
39 Blouses and Shirts	–	–	–	–	–	–	68	68	22	22
40 Sleepwear	–	–	–	–	–	–	–	–	–	–
42 Sportswear	–	–	–	–	–	–	–	–	6	6
43 Foundation Garments	–	–	–	–	–	–	–	–	–	–
44 Swimwear	–	–	–	–	–	–	–	–	–	–
45 Underwear	–	–	–	–	–	–	–	–	–	–
46 Jackets, Coats, Rainwear	–	–	–	–	–	–	–	–	–	–
47 Fine Suits, Blazers	–	–	–	–	–	–	–	–	–	–
49 Tailored Collar Shirts	–	–	–	–	–	–	–	–	–	–
50 Sweaters	–	–	–	–	–	–	–	–	–	–
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	–	–	–	–	–	–	68	68	17	17
TEXTILE										
Yarns	–	–	57	57	81	78	98	89	55	55
Fabrics	–	–	–	–	–	–	–	–	–	–
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	–	–	–	–	–	–	–	–	–	–
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	–	–	–	–	–	–	–	–	86	86

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint

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

Table A-25

BULGARIA
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	0	0	80	80	93	93	214	214	80	80
37 Pants, Shorts, Overalls	21	21	30	30	95	95	58	58	37	37
39 Blouses and Shirts	0	0	0	0	1	1	29	29	6	6
40 Sleepwear	–	–	–	–	–	–	–	–	–	–
42 Sportswear	–	–	–	–	–	–	–	–	–	–
43 Foundation Garments	–	–	–	–	–	–	–	–	–	–
44 Swimwear	–	–	–	–	–	–	–	–	–	–
45 Underwear	–	–	–	–	–	–	–	–	–	–
46 Jackets, Coats, Rainwear	21	21	55	55	73	68	75	69	41	42
47 Fine Suits, Blazers	110	100	0	0	3	3	68	68	102	93
49 Tailored Collar Shirts	0	0	0	0	32	32	68	75	32	30
50 Sweaters	0	0	8	8	67	67	55	55	111	100
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	13	13	25	25	54	53	66	66	47	46
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	–	–	–	–	–	–	–	–	–	–
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	–	–	–	–	–	–	–	–	–	–
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	–	–	–	–	–	–	–	–	–	–

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint
0: no performance against restraint level

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

Table A-26

CHINA, P.R.
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	60	60	94	94	98	98	94	94	117	108
37 Pants, Shorts, Overalls	103	100	111	111	110	100	101	102	122	121
39 Blouses and Shirts	59	59	90	90	127	100	93	100	100	107
40 Sleepwear	83	83	102	102	107	100	96	96	96	93
42 Sportswear	27	31	87	87	118	100	86	90	113	108
43 Foundation Garments	–	–	–	–	139	100	70	100	101	101
44 Swimwear	89	89	254	254	934	934	603	603	78	78
45 Underwear	40	40	107	107	110	100	103	106	127	127
46 Jackets, Coats, Rainwear	47	47	80	88	66	94	58	58	88	88
47 Fine Suits, Blazers	20	20	130	130	115	115	143	143	19	19
49 Tailored Collar Shirts	101	101	99	100	99	99	93	93	120	118
50 Sweaters	95	95	97	97	100	100	95	95	112	105
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	74	74	101	101	122	109	98	101	108	107
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	19	19	36	35	40	40	27	27	39	39
Hosiery	66	71	113	105	108	100	88	90	93	85
Work Gloves	62	62	97	97	103	100	98	98	100	97
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	31	31	41	43	53	53	48	48	62	57
Other Household	44	49	35	35	47	54	62	62	54	54
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	95	87	113	105	114	100	74	79	76	70

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint

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

Table A-27

CZECHOSLOVAKIA
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	–	–	–	–	–	–	–	–	–	–
37 Pants, Shorts, Overalls	58	44	53	49	30	31	8	8	12	12
39 Blouses and Shirts	–	–	–	–	–	–	–	–	–	–
40 Sleepwear	–	–	–	–	–	–	–	–	–	–
42 Sportswear	–	–	–	–	–	–	–	–	–	–
43 Foundation Garments	–	–	–	–	–	–	–	–	–	–
44 Swimwear	–	–	–	–	–	–	–	–	–	–
45 Underwear	–	–	–	–	–	–	–	–	–	–
46 Jackets, Coats, Rainwear	–	–	–	–	–	–	–	–	–	–
47 Fine Suits, Blazers	106	96	103	93	97	97	76	77	91	91
49 Tailored Collar Shirts	–	–	–	–	–	–	–	–	–	–
50 Sweaters	–	–	–	–	–	–	–	–	–	–
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	62	48	57	53	36	36	14	14	18	18
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	44	40	79	76	84	80	70	73	89	89
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	–	–	–	–	–	–	–	–	–	–
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	70	74	112	99	102	99	82	86	85	85

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint

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

Table A-28

HONG KONG
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	104	104	86	87	110	110	86	86	94	94
37 Pants, Shorts, Overalls	109	104	110	104	107	102	111	106	106	102
39 Blouses and Shirts	71	79	94	104	93	99	101	98	102	101
40 Sleepwear	32	32	100	100	97	93	98	89	76	76
42 Sportswear	79	75	96	96	95	95	105	101	106	101
43 Foundation Garments	46	46	58	58	95	95	108	100	101	101
44 Swimwear	52	52	100	100	111	111	103	103	79	79
45 Underwear	104	102	103	101	106	105	108	107	99	100
46 Jackets, Coats, Rainwear	92	92	97	97	107	107	109	109	98	98
47 Fine Suits, Blazers	8	8	4	4	40	40	81	81	282	282
49 Tailored Collar Shirts	107	107	101	102	104	104	106	106	103	104
50 Sweaters	68	85	90	105	82	91	90	85	108	101
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	84	88	97	101	97	99	103	99	103	101
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	–	–	83	83	56	56	102	102	69	65
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	62	77	66	78	91	101	94	99	90	93
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	102	102	98	98	61	56	32	32
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	97	97	101	101	89	89	68	68	39	39

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint

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

Table A-29

HUNGARY
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	–	–	–	–	–	–	–	–	–	–
37 Pants, Shorts, Overalls	–	–	–	–	–	–	–	–	–	–
39 Blouses and Shirts	–	–	–	–	–	–	–	–	–	–
40 Sleepwear	–	–	–	–	–	–	–	–	–	–
42 Sportswear	–	–	–	–	–	–	–	–	–	–
43 Foundation Garments	–	–	–	–	–	–	–	–	–	–
44 Swimwear	–	–	–	–	–	–	–	–	–	–
45 Underwear	–	–	–	–	–	–	–	–	–	–
46 Jackets, Coats, Rainwear	–	–	–	–	–	–	–	–	–	–
47 Fine Suits, Blazers	75	75	10	10	32	32	26	26	43	43
49 Tailored Collar Shirts	–	–	–	–	–	–	–	–	–	–
50 Sweaters	–	–	–	–	–	–	–	–	–	–
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	75	75	10	10	32	32	26	26	43	43
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	–	–	–	–	–	–	–	–	–	–
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	–	–	–	–	–	–	–	–	–	–
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	–	–	–	–	–	–	–	–	–	–

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint

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

Table A-30

INDIA
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	–	–	–	–	–	–	–	–	–	–
37 Pants, Shorts, Overalls	61	58	109	93	106	93	113	97	90	86
39 Blouses and Shirts	79	78	CA	CA	CA	CA	CA	CA	CA	CA
40 Sleepwear	–	–	–	–	–	–	–	–	–	–
42 Sportswear	83	79	CA	CA	CA	CA	CA	CA	CA	CA
43 Foundation Garments	–	–	–	–	–	–	–	–	–	–
44 Swimwear	–	–	–	–	–	–	–	–	–	–
45 Underwear	–	–	–	–	–	–	–	–	–	–
46 Jackets, Coats, Rainwear	12	11	CA	CA	CA	CA	CA	CA	CA	CA
47 Fine Suits, Blazers	–	–	–	–	–	–	–	–	–	–
49 Tailored Collar Shirts	76	89	67	61	111	100	100	89	111	99
50 Sweaters	–	–	–	–	–	–	–	–	–	–
99 Clothing Aggregates	–	–	79	73	99	86	98	98	83	80
Total	74	73	81	73	100	87	100	98	85	82
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	29	29	68	68	83	83	75	75	66	66
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	0	0	TA	TA	TA	TA	TA	TA	0	0
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	20	20	TA	TA	TA	TA	TA	TA	95	95

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint
0: no performance against restraint level
CA: clothing aggregates
TA: textile aggregates

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

Table A-31

INDONESIA
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	–	–	–	–	–	–	–	–	14	14
37 Pants, Shorts, Overalls	–	–	236	236	97	62	95	101	103	94
39 Blouses and Shirts	–	–	–	–	–	–	56	56	71	72
40 Sleepwear	–	–	–	–	–	–	–	–	41	43
42 Sportswear	–	–	–	–	–	–	102	100	71	71
43 Foundation Garments	–	–	–	–	–	–	–	–	–	–
44 Swimwear	–	–	–	–	–	–	–	–	–	–
45 Underwear	–	–	–	–	–	–	–	–	92	92
46 Jackets, Coats, Rainwear	–	–	–	–	–	–	–	–	9	9
47 Fine Suits, Blazers	–	–	–	–	–	–	–	–	–	–
49 Tailored Collar Shirts	–	–	177	177	107	96	102	94	67	95
50 Sweaters	–	–	–	–	–	–	–	–	106	100
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	–	–	205	205	102	90	66	65	74	74
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	–	–	–	–	–	–	–	–	–	–
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	–	–	–	–	–	–	–	–	–	–
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	–	–	–	–	–	–	–	–	–	–

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint

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

Table A-32

KOREA, NORTH
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	–	–	–	–	–	–	–	–	0	0
37 Pants, Shorts, Overalls	–	–	–	–	–	–	–	–	54	54
39 Blouses and Shirts	–	–	–	–	–	–	–	–	0	0
40 Sleepwear	–	–	–	–	–	–	–	–	–	–
42 Sportswear	–	–	–	–	–	–	–	–	38	38
43 Foundation Garments	–	–	–	–	–	–	–	–	–	–
44 Swimwear	–	–	–	–	–	–	–	–	–	–
45 Underwear	–	–	–	–	–	–	–	–	–	–
46 Jackets, Coats, Rainwear	–	–	–	–	–	–	–	–	72	72
47 Fine Suits, Blazers	–	–	–	–	–	–	–	–	–	–
49 Tailored Collar Shirts	–	–	–	–	–	–	–	–	–	–
50 Sweaters	–	–	–	–	–	–	–	–	0	0
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	–	–	–	–	–	–	–	–	30	30
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	–	–	–	–	–	–	–	–	–	–
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	–	–	–	–	–	–	–	–	–	–
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	–	–	–	–	–	–	–	–	–	–

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint
0: no performance against restraint level

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

Table A-33

KOREA, SOUTH
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	103	100	100	99	102	100	101	99	102	100
37 Pants, Shorts, Overalls	74	84	103	99	101	100	92	100	100	100
39 Blouses and Shirts	105	95	99	99	100	99	96	98	100	100
40 Sleepwear	6	44	45	83	80	74	94	87	72	81
42 Sportswear	99	93	100	97	97	94	105	99	103	98
43 Foundation Garments	R	R	R	R	R	R	R	R	R	R
44 Swimwear	0	0	44	100	96	96	86	83	111	100
45 Underwear	62	62	105	100	92	92	22	33	52	66
46 Jackets, Coats, Rainwear	112	100	102	99	100	99	107	97	85	92
47 Fine Suits, Blazers	93	93	92	90	96	99	88	98	88	99
49 Tailored Collar Shirts	102	99	101	100	100	100	103	100	100	100
50 Sweaters	87	94	96	99	100	99	103	100	101	100
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	97	95	99	99	100	99	100	99	99	99
TEXTILE										
Yarns	74	70	70	63	71	62	85	79	96	83
Fabrics	90	83	107	91	104	90	108	96	98	91
Hosiery	109	99	101	100	99	94	109	98	102	98
Work Gloves	5	6	3	3	27	38	88	80	73	67
Handbags	73	73	78	71	64	58	52	53	45	45
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	7	7	7	6	43	38	8	8	3	2
Coated Fabrics, Cordage	18	20	35	34	28	25	22	23	30	33
Cotton Terry Towels	–	–	–	–	–	–	–	–	–	–

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint
0: no performance against restraint level
R: under restraint, but included with another category

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

Table A-34

MACAU
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	99	99	97	96	106	100	106	100	105	99
37 Pants, Shorts, Overalls	94	99	100	100	99	99	105	98	105	99
39 Blouses and Shirts	CA	CA	CA	CA	CA	CA	CA	CA	CA	CA
40 Sleepwear	CA	CA	CA	CA	CA	CA	CA	CA	CA	CA
42 Sportswear	CA	CA	CA	CA	CA	CA	CA	CA	CA	CA
43 Foundation Garments	CA	CA	CA	CA	CA	CA	CA	CA	CA	CA
44 Swimwear	CA	CA	CA	CA	CA	CA	CA	CA	CA	CA
45 Underwear	CA	CA	CA	CA	CA	CA	CA	CA	CA	CA
46 Jackets, Coats, Rainwear	22	23	48	48	65	65	73	76	45	47
47 Fine Suits, Blazers	0	0	0	0	0	0	0	0	0	0
49 Tailored Collar Shirts	62	62	105	94	93	93	111	100	106	100
50 Sweaters	58	58	95	95	99	99	70	70	110	99
99 Clothing Aggregates	85	88	138	101	118	118	112	112	128	126
Total	70	72	101	91	98	98	95	93	102	99
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	–	–	–	–	–	–	–	–	–	–
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	36	36	100	90	94	94	88	88	90	81
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	–	–	–	–	–	–	–	–	–	–

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint
0: no performance against restraint level
CA: clothing aggregates

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

Table A-35

MALAYSIA
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	–	–	–	–	–	–	–	–	–	–
37 Pants, Shorts, Overalls	–	–	–	–	89	89	88	88	89	77
39 Blouses and Shirts	2	2	15	14	124	71	55	63	82	73
40 Sleepwear	–	–	–	–	–	–	–	–	–	–
42 Sportswear	–	–	–	–	–	–	49	49	77	61
43 Foundation Garments	–	–	–	–	–	–	–	–	–	–
44 Swimwear	–	–	–	–	–	–	–	–	–	–
45 Underwear	–	–	–	–	–	–	–	–	–	–
46 Jackets, Coats, Rainwear	–	–	–	–	–	–	–	–	–	–
47 Fine Suits, Blazers	–	–	–	–	–	–	–	–	–	–
49 Tailored Collar Shirts	95	95	63	63	115	100	106	99	105	98
50 Sweaters	69	69	34	34	30	38	35	45	32	46
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	55	55	40	39	102	79	66	70	81	73
TEXTILE										
Yarns	235	100	204	100	65	65	100	100	78	78
Fabrics	–	–	–	–	–	–	–	–	–	–
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	–	–	–	–	–	–	–	–	–	–
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	–	–	–	–	–	–	–	–	–	–

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint

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

Table A-36

MALDIVES
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	–	–	–	–	–	–	–	–	0	0
37 Pants, Shorts, Overalls	–	–	–	–	–	–	–	–	0	0
39 Blouses and Shirts	–	–	–	–	–	–	–	–	0	0
40 Sleepwear	–	–	–	–	–	–	–	–	CA	CA
42 Sportswear	–	–	–	–	–	–	–	–	0	0
43 Foundation Garments	–	–	–	–	–	–	–	–	CA	CA
44 Swimwear	–	–	–	–	–	–	–	–	CA	CA
45 Underwear	–	–	–	–	–	–	–	–	CA	CA
46 Jackets, Coats, Rainwear	–	–	–	–	–	–	–	–	0	0
47 Fine Suits, Blazers	–	–	–	–	–	–	–	–	0	0
49 Tailored Collar Shirts	–	–	–	–	–	–	–	–	41	41
50 Sweaters	–	–	–	–	–	–	–	–	28	28
99 Clothing Aggregates	–	–	–	–	–	–	–	–	0	0
Total	–	–	–	–	–	–	–	–	9	9
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	–	–	–	–	–	–	–	–	–	–
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	–	–	–	–	–	–	–	–	–	–
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	–	–	–	–	–	–	–	–	–	–

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint
0: no performance against restraint level
CA: clothing aggregates

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

Table A-37

MAURITIUS
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	–	–	–	–	–	–	–	–	–	–
37 Pants, Shorts, Overalls	–	–	–	–	–	–	–	–	–	–
39 Blouses and Shirts	–	–	–	–	–	–	–	–	–	–
40 Sleepwear	–	–	–	–	–	–	–	–	–	–
42 Sportswear	–	–	–	–	–	–	–	–	–	–
43 Foundation Garments	–	–	–	–	–	–	–	–	–	–
44 Swimwear	–	–	–	–	–	–	–	–	–	–
45 Underwear	–	–	–	–	–	–	–	–	–	–
46 Jackets, Coats, Rainwear	–	–	–	–	–	–	–	–	–	–
47 Fine Suits, Blazers	–	–	–	–	–	–	–	–	–	–
49 Tailored Collar Shirts	–	–	–	–	–	–	–	–	104	99
50 Sweaters	–	–	–	–	51	51	98	99	75	68
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	–	–	–	–	51	51	98	99	92	85
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	–	–	–	–	–	–	–	–	–	–
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	–	–	–	–	–	–	–	–	–	–
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	–	–	–	–	–	–	–	–	–	–

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint

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

Table A-38

PAKISTAN
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	–	–	–	–	–	–	–	–	–	–
37 Pants, Shorts, Overalls	–	–	72	72	92	92	106	98	92	92
39 Blouses and Shirts	–	–	58	58	86	86	87	81	101	101
40 Sleepwear	–	–	–	–	–	–	–	–	–	–
42 Sportswear	–	–	64	64	27	27	15	16	20	20
43 Foundation Garments	–	–	–	–	–	–	–	–	–	–
44 Swimwear	–	–	–	–	–	–	–	–	–	–
45 Underwear	–	–	–	–	–	–	–	–	7	7
46 Jackets, Coats, Rainwear	–	–	–	–	–	–	–	–	–	–
47 Fine Suits, Blazers	–	–	–	–	–	–	–	–	–	–
49 Tailored Collar Shirts	–	–	2	2	8	8	94	80	86	86
50 Sweaters	–	–	–	–	–	–	–	–	–	–
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	–	–	56	56	69	69	74	70	73	73
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	–	–	–	–	–	–	–	–	–	–
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	–	–	97	103	94	94	77	94	102	102
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	106	106	114	100	109	100	97	100	96	98

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint

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

Table A-39

PHILIPPINES
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	57	57	107	91	111	94	94	84	85	86
37 Pants, Shorts, Overalls	99	91	121	96	77	85	97	100	86	80
39 Blouses and Shirts	66	66	100	100	95	95	88	88	100	97
40 Sleepwear	54	54	79	68	92	84	61	61	69	69
42 Sportswear	15	15	28	28	87	87	54	54	82	74
43 Foundation Garments	9	9	8	8	12	30	13	27	21	69
44 Swimwear	–	–	–	–	–	–	–	–	–	–
45 Underwear	86	86	130	100	96	95	75	75	105	100
46 Jackets, Coats, Rainwear	33	33	67	67	98	98	62	62	67	61
47 Fine Suits, Blazers	27	27	11	11	42	42	114	97	52	54
49 Tailored Collar Shirts	6	6	61	64	114	96	91	91	94	90
50 Sweaters	11	11	21	21	68	68	84	84	107	107
99 Clothing Aggregates	73	73	102	92	114	101	104	93	63	62
Total	51	50	73	68	82	89	73	78	65	74
TEXTILE										
Yarns	58	58	0	0	0	0	0	0	0	0
Fabrics	–	–	–	–	–	–	–	–	–	–
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	–	–	–	–	–	–	–	–	–	–
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	–	–	–	–	–	–	–	–	–	–

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint
0: no performance against restraint level

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

Table A-40

POLAND
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	–	–	–	–	–	–	–	–	–	–
37 Pants, Shorts, Overalls	64	64	35	35	74	67	46	46	85	77
39 Blouses and Shirts	33	32	36	36	30	30	19	19	21	21
40 Sleepwear	100	100	104	99	110	100	105	99	81	79
42 Sportswear	–	–	–	–	–	–	–	–	–	–
43 Foundation Garments	–	–	–	–	–	–	–	–	–	–
44 Swimwear	–	–	–	–	–	–	–	–	–	–
45 Underwear	–	–	–	–	–	–	–	–	–	–
46 Jackets, Coats, Rainwear	36	36	20	20	21	21	15	15	25	26
47 Fine Suits, Blazers	102	97	73	72	46	42	67	67	126	100
49 Tailored Collar Shirts	0	0	0	0	0	0	0	0	0	0
50 Sweaters	71	71	74	74	82	82	10	10	96	87
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	51	49	44	44	50	49	32	33	48	46
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	34	34	28	28	45	45	37	37	41	40
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	–	–	–	–	–	–	–	–	–	–
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	51	51	98	89	5	5	70	70	82	75

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint
O: no performance against restraint level

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

Table A-41

ROMANIA
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	52	52	58	58	108	99	67	67	64	64
37 Pants, Shorts, Overalls	29	29	83	83	30	68	20	20	59	59
39 Blouses and Shirts	17	17	4	4	44	32	35	36	47	47
40 Sleepwear	R	R	R	R	R	R	R	R	R	R
42 Sportswear	–	–	–	–	–	–	–	–	–	–
43 Foundation Garments	–	–	–	–	–	–	–	–	–	–
44 Swimwear	–	–	–	–	–	–	–	–	–	–
45 Underwear	–	–	–	–	–	–	–	–	–	–
46 Jackets, Coats, Rainwear	R	R	R	R	R	R	R	R	R	R
47 Fine Suits, Blazers	R	R	R	R	R	R	R	R	R	R
49 Tailored Collar Shirts	61	61	100	100	105	95	93	99	87	87
50 Sweaters	72	72	85	85	113	100	108	100	83	88
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	40	40	54	54	66	63	59	58	61	62
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	0	0	4	4	2	2	0	0	16	16
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	–	–	–	–	–	–	–	–	–	–
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	–	–	–	–	–	–	–	–	–	–

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint
0: no performance against restraint level
R: under restraint, but included with another category

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

Table A-42

SINGAPORE
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	8	8	57	57	44	44	31	31	33	33
37 Pants, Shorts, Overalls	92	92	101	101	89	89	60	60	87	87
39 Blouses and Shirts	19	19	48	48	98	98	59	59	90	90
40 Sleepwear	–	–	–	–	–	–	–	–	–	–
42 Sportswear	12	12	82	82	39	39	32	32	53	53
43 Foundation Garments	–	–	–	–	–	–	–	–	–	–
44 Swimwear	–	–	–	–	–	–	–	–	–	–
45 Underwear	–	–	–	–	–	–	2	2	4	4
46 Jackets, Coats, Rainwear	1	1	2	2	10	10	8	8	26	26
47 Fine Suits, Blazers	0	0	0	0	0	0	0	0	0	0
49 Tailored Collar Shirts	97	97	90	90	118	118	106	97	105	99
50 Sweaters	65	65	42	42	19	19	7	7	68	68
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	56	56	64	64	71	71	42	42	66	66
TEXTILE										
Yarns	100	100	72	61	101	96	111	97	0	0
Fabrics	–	–	–	–	–	–	–	–	–	–
Hosiery	–	–	506	506	0	0	0	0	0	0
Work Gloves	–	–	–	–	–	–	–	–	–	–
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	–	–	–	–	–	–	–	–	–	–

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint
0: no performance against restraint level

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

Table A-43

SRI LANKA
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	–	–	–	–	–	–	87	87	71	71
37 Pants, Shorts, Overalls	–	–	182	100	86	99	46	60	93	93
39 Blouses and Shirts	–	–	–	–	90	90	75	73	82	82
40 Sleepwear	–	–	–	–	–	–	–	–	–	–
42 Sportswear	–	–	–	–	–	–	–	–	–	–
43 Foundation Garments	–	–	–	–	–	–	–	–	–	–
44 Swimwear	–	–	–	–	–	–	–	–	–	–
45 Underwear	–	–	–	–	98	98	82	82	69	69
46 Jackets, Coats, Rainwear	34	34	34	34	81	93	87	87	23	23
47 Fine Suits, Blazers	–	–	–	–	–	–	–	–	–	–
49 Tailored Collar Shirts	98	98	107	100	101	100	97	99	95	95
50 Sweaters	–	–	–	–	–	–	–	–	–	–
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	65	65	95	78	91	96	80	82	71	71
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	–	–	–	–	–	–	–	–	–	–
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	–	–	112	100	87	98	93	93	90	90
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	–	–	–	–	–	–	–	–	–	–

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint

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

Table A-44

TAIWAN
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	95	95	96	96	99	99	99	99	100	100
37 Pants, Shorts, Overalls	104	99	105	96	101	95	101	96	98	100
39 Blouses and Shirts	96	98	99	99	101	97	100	98	99	99
40 Sleepwear	97	98	101	101	103	96	102	98	97	99
42 Sportswear	96	95	107	99	97	94	101	96	99	99
43 Foundation Garments	R	R	R	R	R	R	R	R	R	R
44 Swimwear	100	95	101	100	101	95	100	95	98	98
45 Underwear	105	100	98	98	104	98	102	98	92	95
46 Jackets, Coats, Rainwear	95	96	99	99	106	98	94	91	92	88
47 Fine Suits, Blazers	106	100	100	100	70	70	50	49	83	82
49 Tailored Collar Shirts	97	97	100	100	102	100	98	100	99	100
50 Sweaters	96	99	100	100	92	98	101	100	100	100
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	98	98	101	99	100	97	100	97	98	99
TEXTILE										
Yarns	91	87	91	86	92	83	105	94	90	81
Fabrics	60	60	89	85	86	78	102	92	102	92
Hosiery	104	99	103	98	102	92	108	98	101	95
Work Gloves	96	96	83	83	109	97	103	92	107	98
Handbags	94	90	96	91	99	89	97	87	100	90
Bed Sheets, Pillowcases	37	39	55	66	24	23	13	12	12	12
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	28	28	48	54	32	31	85	78	62	59
Cotton Terry Towels	88	88	102	98	102	92	91	82	109	98

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint
R: under restraint, but included with another category

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

Table A-45

THAILAND
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	20	19	114	97	106	95	107	95	100	93
37 Pants, Shorts, Overalls	121	121	211	90	96	85	109	93	103	94
39 Blouses and Shirts	50	47	106	90	102	90	109	97	104	99
40 Sleepwear	–	–	–	–	–	–	–	–	–	–
42 Sportswear	8	18	102	102	88	90	96	88	103	88
43 Foundation Garments	–	–	–	–	–	–	–	–	–	–
44 Swimwear	–	–	–	–	–	–	–	–	–	–
45 Underwear	–	–	–	–	–	–	38	53	102	88
46 Jackets, Coats, Rainwear	137	137	259	86	98	86	62	68	54	69
47 Fine Suits, Blazers	–	–	–	–	–	–	–	–	–	–
49 Tailored Collar Shirts	36	29	32	36	89	80	116	99	106	98
50 Sweaters	–	–	–	–	–	–	113	99	101	99
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	50	47	114	86	93	88	90	86	98	90
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	–	–	–	–	–	–	–	–	–	–
Hosiery	–	–	–	–	108	99	65	61	99	89
Work Gloves	27	26	42	42	102	89	70	66	52	65
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	–	–	–	–	–	–	–	–	–	–

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint

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

Table A-46

TURKEY
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	–	–	–	–	–	–	–	–	–	–
37 Pants, Shorts, Overalls	–	–	–	–	–	–	–	–	46	46
39 Blouses and Shirts	–	–	–	–	–	–	–	–	–	–
40 Sleepwear	–	–	–	–	–	–	–	–	–	–
42 Sportswear	–	–	–	–	–	–	–	–	–	–
43 Foundation Garments	–	–	–	–	–	–	–	–	–	–
44 Swimwear	–	–	–	–	–	–	–	–	–	–
45 Underwear	–	–	–	–	–	–	–	–	–	–
46 Jackets, Coats, Rainwear	–	–	–	–	–	–	–	–	–	–
47 Fine Suits, Blazers	–	–	–	–	–	–	–	–	–	–
49 Tailored Collar Shirts	–	–	–	–	–	–	–	–	–	–
50 Sweaters	–	–	–	–	–	–	–	–	–	–
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	–	–	–	–	–	–	–	–	46	46
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	–	–	–	–	–	–	–	–	–	–
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	–	–	–	–	–	–	–	–	–	–
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	–	–	–	–	–	–	–	–	–	–

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint

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

Table A-47

URUGUAY
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	–	–	–	–	–	–	–	–	–	–
37 Pants, Shorts, Overalls	–	–	–	–	–	–	–	–	–	–
39 Blouses and Shirts	–	–	–	–	–	–	–	–	–	–
40 Sleepwear	–	–	–	–	–	–	–	–	–	–
42 Sportswear	–	–	–	–	–	–	–	–	–	–
43 Foundation Garments	–	–	–	–	–	–	–	–	–	–
44 Swimwear	–	–	–	–	–	–	–	–	–	–
45 Underwear	–	–	–	–	–	–	–	–	–	–
46 Jackets, Coats, Rainwear	–	–	–	–	–	–	–	–	–	–
47 Fine Suits, Blazers	–	–	–	–	–	–	–	–	–	–
49 Tailored Collar Shirts	–	–	–	–	–	–	–	–	–	–
50 Sweaters	–	–	–	–	–	–	–	–	–	–
99 Clothing Aggregates	–	–	–	–	–	–	–	–	–	–
Total	–	–	–	–	–	–	–	–	–	–
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	–	–	96	93	99	99	90	90	69	69
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	–	–	–	–	–	–	–	–	–	–
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	–	–	–	–	–	–	–	–	–	–

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint

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

Table A-48

VIETNAM
RESTRAINT UTILIZATION
(per cent)

	1982		1983		1984		1985		1986	
	A	B	A	B	A	B	A	B	A	B
CLOTHING										
32 Winter Outerwear	–	–	–	–	–	–	–	–	0	0
37 Pants, Shorts, Overalls	–	–	–	–	–	–	–	–	0	0
39 Blouses and Shirts	–	–	–	–	–	–	–	–	52	52
40 Sleepwear	–	–	–	–	–	–	–	–	CA	CA
42 Sportswear	–	–	–	–	–	–	–	–	0	0
43 Foundation Garments	–	–	–	–	–	–	–	–	CA	CA
44 Swimwear	–	–	–	–	–	–	–	–	CA	CA
45 Underwear	–	–	–	–	–	–	–	–	CA	CA
46 Jackets, Coats, Rainwear	–	–	–	–	–	–	–	–	0	0
47 Fine Suits, Blazers	–	–	–	–	–	–	–	–	0	0
49 Tailored Collar Shirts	–	–	–	–	–	–	–	–	50	50
50 Sweaters	–	–	–	–	–	–	–	–	26	26
99 Clothing Aggregates	–	–	–	–	–	–	–	–	0	0
Total	–	–	–	–	–	–	–	–	39	39
TEXTILE										
Yarns	–	–	–	–	–	–	–	–	–	–
Fabrics	–	–	–	–	–	–	–	–	–	–
Hosiery	–	–	–	–	–	–	–	–	–	–
Work Gloves	–	–	–	–	–	–	–	–	–	–
Handbags	–	–	–	–	–	–	–	–	–	–
Bed Sheets, Pillowcases	–	–	–	–	–	–	–	–	–	–
Other Household	–	–	–	–	–	–	–	–	–	–
Coated Fabrics, Cordage	–	–	–	–	–	–	–	–	–	–
Cotton Terry Towels	–	–	–	–	–	–	–	–	–	–

A: based on the original restraint level
B: based on the adjusted restraint level
–: not under restraint
0: no performance against restraint level
CA: clothing aggregates

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

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