

Tekstilna industrija



1868 - 2020

SAVEZ INŽENJERA I TEHNIČARA TEKSTILACA SRBIJE
UNION OF TEXTILE ENGINEERS AND TECHNICIANS
OF SERBIA



THIMBLE



TAILOR'S RULER



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NEEDLE



FABRIC Naučni i stručni časopis tekstilne i odevne industrije NG NEEDLES SKIN OF YARN ZIPPER
Scientific and professional journal of the Union of textile engineers and technicians of Serbia



TAILOR'S DUMMY



SPOOL



IRON



CROCHET



LEATHER



JACKET



SEWING PATTERN



CROSS-STITCH



BOBBIN



TAILOR'S SHEARS



KNITWEAR



BUTTONS



SAFETY PIN



KNITTING



BOWKNOT



CLOTHING



MEASURING TAPE



DRESS SHIRT



CLOTH



SEWING MACHI

Najbolja publikacija za 2018. godinu



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REČ UREDNIKA

Zbog novonastale situacije izazvane pademijom virusa COVID 19, a u skladu sa merama koje su preduzete u cilju suzbijanja istog, III Međunarodna konferencija "Savremeni trendovi i inovacije u tekstilnoj industriji" nije održana u predviđenom terminu od 21. do 22. maja 2020. godine. Poštujući sve preporuke za bezbedno održavanje javnih skupova konferencija se održala od 17. do 18. septembra 2020. godine u Beogradu u svečanoj sali Doma inženjera "Nikola Tesla".

Konferencija se po prvi put održala u kombinovanom obliku, tako što su Plenarna sekcija i Sekcija 1 održane uživo sa dozvoljenih trideset prisustnih u sali. Zatim, u Online sekciji, autori iz inostranstva, ali i autori iz naše zemlje koji nisu bili u mogućnosti da prisustvuju konferenciji, uključili su se putem video linka i time je omogućeno praćenje njihovih prezentacija. U Poster elektronskoj sekciji radovi autora su postavljeni na sajt Saveza inženjera i tehničara Srbije, na stranici Saveza inženjera i tehničara tekstilaca Srbije na srpskom i engleskom jeziku, te je na taj način poster sekcija bila dostupna svim učesnicima konferencije, ali i široj javnosti.

I u ovim vanrednim okolnostima ostvaren je cilj konferencije, a organizovanje ovog naučnog skupa je opravdalo dato poverenje. Nadamo se da ćemo se sledeće godine, 2021. godine na IV Međunarodnoj konferenciji "Savremeni trendovi i inovacije u tekstilnoj industriji" okupiti u većom broju i u drugim, boljim okolnostima.

Glavni i odgovorni urednik
Prof. dr Snežana Urošević

TEXTILE INDUSTRY IN NORTH MACEDONIA

Silvana Zezova^{1*}, Sonja Jordeva¹, Sashka Golomeova Longurova¹, Aco Janevski¹

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Abstract: *The textile industry in North Macedonia is one of the most important industry sectors with a long tradition and experience and plays an enormous part in the general economic performance and external position of the country. According to the latest structural data, the textile and garment industry in 2019 recruits around 35,000 workers, or 27 % of the total number of employees in the manufacturing sector, dealing with the industry. The textile sector participates with 13% in the industry's GDP and represents 10% of the total exports in average. The purpose of this paper is to explore the development of the textile industry in the Republic of North Macedonia in the last 10 years.*

Keywords: textile production, wearing apparel, net wage, Industrial production volume indices

TEKSTILNA INDUSTRIJA U SEVERNOJ MAKEDONIJI

Apstract: *Tekstilna industrija u Severnoj Makedoniji jedan je od najvažnijih industrijskih sektora sa dugom tradicijom i iskustvom i igra veoma veliku ulogu u ukupnom ekonomskom učinku i spoljnoj poziciji zemlje. Prema poslednjim relevantnim podacima, tekstilna i odevna industrija u 2019. godini zapošljavaju oko 35.000 radnika, odnosno 27% ukupnog broja zaposlenih u industrijskom proizvodnom sektoru. Tekstilni sektor učestvuje sa 13% u industrijskom BDP-u i predstavlja 10% ukupnog izvoza u proseku. Svrha ovog rada je istražiti razvoj tekstilne industrije u Republici Severnoj Makedoniji u poslednjih 10 godina.*

Ključne reči: tekstilna proizvodnja, odeća, neto plate, indeksi obima industrijske proizvodnje.

1. INTRODUCTION

The textile industry in North Macedonia is one of the most important industry sectors with a long tradition and experience and plays an enormous part in the Macedonian economy [1, 2]. According to the national Classification of Activity (NCA), textile companies in North Macedonia are divided into two groups [3]:

1. manufacturers of textile materials;
2. manufacturers of wearing apparel, dressing and dyeing of fur.

According to the NACE Rev.21 classification in 2017 year, a total of 1076 companies were registered, 875 companies were registered in the clothing manufacturing segment and 201 in the production of textiles, as it is shown in the Table 1.

Table 1: Number of companies in the Textile and Garment Industry (NACE Rev.2)

Classification	2011	2012	2013	2014	2015	2016	2017
B 13. - Manufacture of textiles	202	203	192	200	193	195	201
B 13.1 - Preparation and spinning of textile fibres	9	9	6	5	6	8	6
B 13.2 - Weaving of textiles	10	9	9	11	8	11	9
B 13.3 - Finishing of textiles	51	52	46	46	52	46	47
B 13.9 - Manufacture of other textiles	132	133	131	138	127	130	139
B 13.91 - Manufacture of knitted and crocheted fabrics	5	3	2	2	2	2	4
B 13.92 - Manufacture of made-up textile articles, except apparel	72	73	74	75	76	75	78
B 13.93 - Manufacture of carpets and rugs	5	5	5	4	2	1	/
B 13.94 - Manufacture of cordage, rope, twine and netting	4	5	5	6	5	5	4
B 13.95 - Manufacture of non-woven and articles made from non-woven, except apparel	4	4	3	2	1	2	/
B 13.96 - Manufacture of other technical and industrial textiles	1	2	1	1	1	3	/
B 13.99 - Manufacture of other textiles n.e.c.	41	41	41	48	40	42	47
B14 - Manufacture of wearing apparel	968	943	916	878	894	916	875
B14. 1 Manufacture of wearing apparel, except fur apparel	920	900	877	839	857	877	839
B14.11 - Manufacture of leather clothes	7	7	7	6	4	5	4
B14.12 - Manufacture of workwear	74	72	70	69	70	72	71
B14.13 - Manufacture of other outerwear	754	739	716	684	704	719	692
B14.14 - Manufacture of underwear	48	50	54	51	48	53	49
B14.19 - Manufacture of other wearing apparel and accessories	37	32	30	29	31	28	23
B14.2 - Manufacture of articles of fur	4	4	3	3	4	4	4
B14.3 - Manufacture of knitted and crocheted apparel	44	39	36	36	33	35	32
B14.31- Manufacture of knitted and crocheted hosiery	24	23	21	19	19	18	16
B14.39- Manufacture of other knitted and crocheted apparel	20	16	15	17	14	17	16

Source: State Statistical Office, The Republic of North Macedonia (MAKSTAT Database) [4]

According to the latest structural data, in the clothing manufacturing sector around 500 companies are active and recruit around 27.000 employees in total. According to the number of employees, 50%

are small enterprises recruiting between 10 and 49 workers, 35% are medium size enterprises who recruit between 50 and 249 workers and only 5 % are large company with more than 250 employees (Table 2).

Table 2: Number of enterprises in the Textile and Garment Industry

Type of enterprises	Number of employees	Total number of enterprises
Micro enterprises	< 10	60
Small enterprises	10 - 49	253
Medium – sized enterprises	50 - 249	170
Large enterprises	> 250	24

Source: State Statistical Office, The Republic of North Macedonia (MAKSTAT Database) [4]

Textile industry is covering the entire territory of the Republic of North Macedonia and there are 8 large regions regarding the spatial concentration of textile companies throughout the country (Table 3). More than a 40% (209 active companies) of the total textile companies are placed in the Eastern Statistical region. 14% or 65 companies are located in Southeastern region, followed by Skopje planning region with 11% (56 active companies), the Pelagonia region with 5%

(43 companies), the Vardar region with 32 companies the Southwest region with 26 companies, the Northeast region with 21 companies and the Polog region with 15 active companies [5].

The center of the textile and garment industry is the town of Shtip, with 77 apparel companies, followed by Kocani with more than 50 companies, and Delchevo with about 30 companies (table 3).

Table 3: Number of textile and apparel companies per city [5]

City	Number of companies	City	Number of companies
EAST REGION (209)		VARDAR REGION (32)	
Shtip	77	Veles	9
Kocani	53	Kavadarci	9
Vinica	22	Sveti Nikole	7
Probishtip	8	Negotino	7
Delchevo	31	SKOPJE REGION (56)	
Berovo	6	Skopje	56
Makedonska Kamenica	7	PELAGONIA REGION (43)	
Zrnovci	5	Prilep	25
SOUTHEAST REGION (65)		Bitola	18
Radovish	13	SOUTHWEST REGION (26)	
Strumica	22	Ohrid	17
Gevgelija	21	Struga	9
Valandovo	9		
NORTHEAST REGION (21)		POLOG REGION (15)	
Kumanovo	15	Tetovo	15
Kratovo	6		

Source: Textile Trade Association -Textile Cluster

2. NUMBER OF EMPLOYEES

According to the structural data shown in table 4 the textile and garment industry in 2019 employs around 35,000 workers, or 27 % of the total number of employees in the manufacturing sector, dealing with the industry. Over the entire period between 2011 and 2018, approximately 7 % of the total number of employees in the country were engaged in the textile and clothing industry.

In the past 9 years the number of employees in the apparel industry is reduced for near 8000 workers or 23 %. On the other hand, in the sector for manufacture of textile there is an increase in the number of employees, from 3,714 employees in 2010 to 7,316 in 2019, i.e. an increase of 3602 employees [6].

Today, the situation in the textile industry is even more difficult due to the crisis imposed by the corona virus, which has contributed to the reduction in the number of employees in the textile and clothing industry.

The salaries of textile employees are perhaps the most problematic issues of this industry. In table 5 is presented the average net wage per employee within the period from 2010 to 2019. The data show that for the period from 2010 to 2019 the average net wage in both sectors have been growing continuously. The average net wage in the textile sector are higher than net wage in the clothing industry. The average net wage in the clothing industry is around 270 EUR, which puts the garment industry among the least paid industries in the country [7].

Table 4: Number of employees in the textile industry, 2010-2019

Year	SECTOR				Total of employees in textile sector
	Total number of employees in North Macedonia	Total number of employees in manufacturing	Manufacture of textiles	Manufacture of wearing apparel	
2010	435078	101093	3714	34680	38394
2011	458873	100878	3158	32525	35683
2012	474398	101132	2717	33360	36077
2013	483447	104214	2737	32611	35348
2014	501788	111559	4928	32913	37841
2015	519031	111208	5135	31742	36877
2016	534200	111402	5286	30919	36205
2017	548681	115614	6027	30243	36270
2018	567230	124359	7519	28232	35751
2019	619663	127831	7316	26920	34236

Source: State Statistical Office, The Republic of North Macedonia [4]

Table 5: Average net wage paid per employee, 2010-2019

Year	Net wage paid per employee			
	Total	Total manufacturing	Manufacture of textiles	Manufacture of wearing apparel
2010	20 553	14 674	9 746	9 728
2011	20 847	15 176	9 623	10 411
2012	20 902	15 300	10 059	10 440
2013	21 145	15 747	11 067	10 831
2014	21 394	16 177	12 662	11 442
2015	21 906	16 594	14 107	12 113
2016	22 342	17 096	15 435	12 641
2017	22 928	18 112	17 949	13 795
2018	24 276	20 073	19 767	15 421
2019	25 213	21 146	21 129	16 191

Source: State Statistical Office, The Republic of North Macedonia [4]

3. INDUSTRIAL PRODUCTION

The textile industry is one of the leading manufacturing industries in North Macedonia with significant participation in GDP formation. The textile sector participates with 13% in the industry's GDP. In table 6 are presented industrial production volume indices in textile industry for the past nine year. The data show that from 2016 to 2019, the manufacturing industry and the production of textiles have been growing

continuously. On the other hand, the clothing industry registered a decline in industrial production. Industrial production in the garment industry in 2019 decreased by 26% compared to 2016 [8, 9].

In table 7 are presented industrial production volume indices in textile industry for the last 5 months of 2020 compared to the same period in 2019 year. Since March 2020, the indices of industrial production in the textile and clothing industry have been steadily declining.

Table 6: Industrial production volume indices in textile industry, 2010-2019

Year	Industrial production volume indices			
	Total	Manufacturing	Manufacture of textiles	Manufacture of wearing apparel
2010	100	99	68	63
2011	104	104	50	75
2012	97	97	54	69
2013	107	110	161	118
2014	112	120	171	123
2015	118	127	196	131
2016	103	105	111	93
2017	104	105	113	78
2018	109	112	124	75
2019	113	114	133,5	69

Source: State Statistical Office, The Republic of North Macedonia, (MAKSTAT Database) [4]

Table 7: Industrial production volume indices in textile industry 2020 (M01-05) vs 2019 (M01-05)

Year	Industrial production volume indices							
	Total		Manufacturing		Manufacture of textiles		Manufacture of wearing apparel	
	2019	2020	2019	2020	2019	2020	2019	2020
January	99,5	99,8	90,0	94,1	115,5	137,7	64,7	68,7
February	104,4	108,0	102,6	109,3	132,5	148,3	72,3	79,1
March	117,5	101,7	119,4	102,3	144,3	121,9	73,2	61,6
April	107,6	71,6	111,1	66,0	139,4	52,3	73,4	40,5
May	112,4	82,1	118,1	80,1	144,1	79,3	72,2	46,3

Source: State Statistical Office, The Republic of North Macedonia, (MAKSTAT Database) [4]

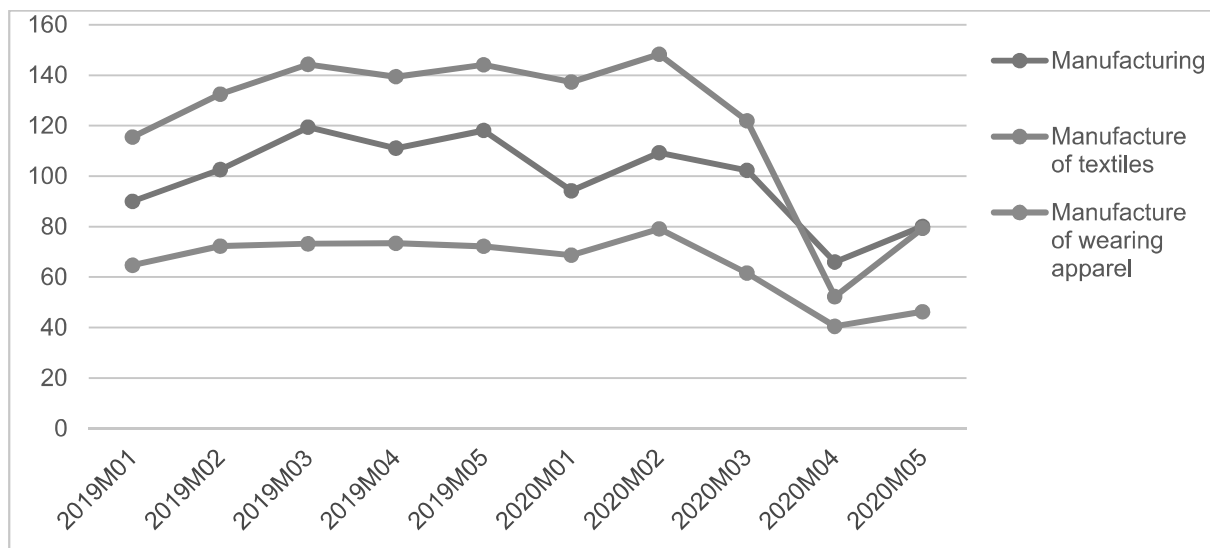


Figure 1: Industrial production volume indices in textile industry, January-May 2019, January-May 2020

According to the data on industrial production (Figure 1), in May 2020 the production of textile has reduced by 45 %, while the production of clothing has decreased by 35% compared to the same period in 2019. Predictions are that the downfall of these sectors however, will continue in the next months as a result of the crises caused by Covid 19.

4. EXPORT AND IMPORT OF TEXTILE

Apparel and textile production in The Republic of North Macedonia is an important export-oriented sector. About 93% of apparel manufacturing companies in The Republic of North Macedonia are oriented towards export (CM и CMT arrangement). This brings small profits even though the companies manufacture for a large number of well-known worldwide brands: Italy (Massimo Rebecchi, Versace, Diesel, Gucci, Nanette, Cinque, Pinko, MaxMara, Vestebene), Germany (Marc Cain, Steilman, Gerry Weber, Apanage, Wahler, Betty Barclay, Escada, Zommermann, A&R Quindici Rabe, Elite Moden, Franken Waelder, Marc Aurel, Mode Institut), Austria (Jones), Netherlands (Barnett & Barnett, La Salle), Belgium (Ahlers, L&V), Denmark (Bruns Bazaar, Bertoni, Samsoe&Samsoe), Czech Republic (Opro CZ) etc. Only a small number of apparel companies have complete production (from obtaining raw materials through creating the final product – OEM). The reasons for this are many because the complete production process is a long and hard process which requires certain capacities, such as technological-technical, financial and human resources [5, 9,10].

Textile is traditionally one of the most widely used products in the export of the Republic of North

Macedonia. The most important export destinations for Macedonian textile products, with over 65% of total exports are: Germany, the Netherlands, Austria, Bulgaria, the United Kingdom, Switzerland, Greece, Italy and the Czech Republic. The mostly exported groups of products are: women's and girls' blouses, T-shirts, suits, vests, jackets and blazers. The table 8 shows the progress of the export and import of textiles in the period from 2010 until 2020. In the past six years, there has been a decline in the value of clothing export by 15% in 2019 compared to 2014. The presented data show that the annual import of garments from 2010 - 2019 is continuously increasing and is usually imported from China, Greece, Turkey, Germany and Italy. Generally, the export of textiles is higher than the import, so the Republic of North Macedonia is a net exporter [10,11].

5. CONCLUSION

The textile industry is one of the leading manufacturing industries in the Republic of North Macedonia with significant participation in GDP formation, high labor absorption and exports. About 1100 companies are registered in the textile industry, out of which 500 are active in the clothing manufacturing sector and recruit around 35.000 employees in total. The total number of employees in textile industry constantly decreases from year to year, i.e. from 38394 employees in 2010, the number of employees decreased to 34236 employees in 2019, 7316 of whom worked in the field of manufacture of textile and 26920 in the field of garment production.

Table 8: Export and import of textile and wearing apparel, cumulative data, 2010-2020 (M01-M04)

Year	Export/ Value in thousand EUR			Import/ Value in thousand EUR			Difference (export – import)
	Textile	Wearing apparel	Total	Textile	Wearing apparel	Total	
2010	47 341	425 888	473229	307 951	45 708	353659	119570
2011	48 782	473 456	522238	344 218	43 625	387843	134395
2012	54 140	468 542	522682	340 014	46 496	386510	136172
2013	65 976	471 973	537949	358 626	51 327	409953	127996
2014	68 940	507 546	576486	393 269	57 022	450291	126195
2015	76 946	480 456	557402	410 923	62 695	473618	83784
2016	90 777	472 415	563192	414 069	72 897	486966	76226
2017	93 755	462 847	556602	436 850	76 400	513250	43352
2018	106 229	453 215	559444	444 772	83 867	528639	30805
2019	105 904	430 937	536841	433 047	90 816	523863	12978
2020 (M01-04)	39 546	127 658	167204	112 272	22 632	134904	32300

Source: State Statistical Office, The Republic of North Macedonia, (MAKSTAT Database) [4]

The data show that from 2016 to 2019, the manufacturing industry and the production of textiles have been growing continuously. On the other hand, the clothing industry registered a decline in industrial production in 2019 by 26% compared to 2016. According to the data for the industrial production in the first five months of 2020, in January and February 2020, there was an increase in industrial production compared to the same periods in 2019, while in March there was a decline in industrial production by 15%. Predictions are that the downfall of these sectors however, will continue in the next months as a result of the crises caused by Covid 19.

About 93% of the apparel production is organized according to the CM and CMT system for the foreign countries. This brings small profits even though the companies manufacture for a large number of well-known worldwide brands. One of the main problems is the low competitive strength of the textile industry. The positive development of companies involved in this industry depends from restructuring of the production, investing in complete production facilities, investing in new technology and equipment (modernization of production), investing in intellectual capital to increase the quality and productivity, creation of domestic brands, investing into promotion on

foreign markets for foreign clients. The potential and possibilities for complete production are huge but the main problem are the big investments in complete production companies.

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