

# HIGHLIGHTING PROSPERITY FOR THE PORTUGUESE TEXTILE INDUSTRY

David Forrester Zamith discusses the country's influences and changes

The performance of 2015 demonstrated that there had been a continuous and sustained series of strong sales growth abroad during the last four years. Portuguese textile exports grew more than 38% in the period highlighted from 2009 (the worst year for the last decade and a half) and this was a result of a restructuring that focused on new drives such as technological innovation, design, automation and advanced logistics, all of which were leveraged in service-intensive and strong investment in international awareness. In total, the sector exported €4.83 billion, and this showed an increase of about 5% compared with 2014.

According to the statement from ATP-Textile and Clothing Association of Portugal: "[...] is of particular importance [relative to] the behaviour of technical textile exports, which registered a growth of 10%, which confirms a trend of diversification in the industrial sector," states Paulo Vaz, ATP Managing Director, adding that the development is in accordance with the strategic plan presented by the ATP in 2014. "... which predicts by the end of the decade a quota of 30% for technical textiles in total production and exports." Home textiles registered the largest growth with an increase of 7% in exports to €08 million.

## 'MADE IN PORTUGAL'

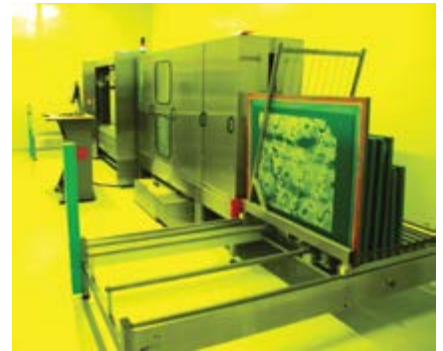
According to the data published by ANIVEC – National Association of industries of Garments and Clothing Europe 28% took over as the

main market for Portuguese exports of clothing in 2015, representing 91.2% of the total shipments of the companies of the sector. Spain, France, United Kingdom, Germany and Netherlands occupy the first five positions in the list of the largest garment markets 'Made in Portugal', representing 78.4% together of all clothing exports. Outside Europe, the USA leads the top of the main garment markets in Portuguese having increased its purchases and despite only making a small contribution. Additionally, China is showing preference to the good image of the Portuguese garment and fashion industry.

ATP already indicates that 2015 numbers anticipate reaching the goal of €5.0 billion as early as 2016. This means it is four years ahead of schedule in the strategic plan.

## SCREEN AND DIGITAL KEY TECHNOLOGIES

The new market demands are presenting a challenge for digital printing as clearly seen at ITMA and FESPA. These include fast sampling and supply, new creative designs or functional applications, different time zones, a new trend for different smaller runs and new innovative printing solutions. Portugal is following these demands exactly and digital is growing in signage, sublimation and home textiles based on roll-to-roll technologies for larger applications. All the traditional players are present in the market, such as EFI Reggiani, MS, MText and Mimaki, according



In-line automation leads to less handling and lower costs

to the segments showing significant growth in the last two years. At ITMA, SPG Prints announced the sale of its new Pike single-pass digital ink-jet printer in Portugal and this will bring higher flexibility, new print quality, productivity and cost efficiency set up to the Portuguese textile market.

All digital infrastructures (from image to print) are responsible for other pre-press and printing systems with the aim to improve, to innovate and to present automated solutions. However, rotary screen-printing is still growing in global terms with new CtP resolutions or finer mesh and, on flat-bed screen-printing, new CTS. These technologies utilised within this field of textile pre-press and in the graphic segment, mean that many smaller runs are also moving to digital printing. Therefore, digital and screen share their own advantages and solutions if image, pre-press and resolution are in balance to print photographic quality images – photo-realistic four-colour process vs traditional separation of solid colours.

## PORTUGUESE TEXTILE-FASHION INDUSTRY (T-SHIRT) GOES SCREEN

Increasingly there is a tendency to use 'multi printing systems' where digital is the preference for customised sampling or small production series; this functions side-by-side with other printing systems for medium and large series or where specific features are required. This type of operation is evident in the area of commercial print (offset, digital and finishing) and in labels (flexo, offset, digital, screen, finishing) as well as in textiles (screen, digital printing, digital sublimation, transfers, flat-bed and rotary printing, piece by piece as with T-shirts using reactive dyes,



Digital direct light stencil exposing in-line CtS system – 1270dpi

pigments, water based, lacquers, plastisols, etc). Does this mean that the possibility of differentiation and being competitive with solutions in pure synergy will be the future? We believe so.

But it is essential to invest in new solutions in terms of image processing, colour management, new ink systems and on 'conventional' screen pre-press technology by betting on 'digital' CtS (computer-to-screen) 'filmless' pre-press anchored to a high resolution software RIP and automatic stencil making processes.

**NEW CTS GENERATION STM-TEX PRE-PRESS CONFIGURATION:**

- No limitation to use mesh/emulsion combinations according to needs
- Real 1270dpi resolution on the screen
- ColorGATE dedicated RIP software for STM CtS technology
- High quality optic Zeiss, sharp edges and perfect auto focus
- Fastest CtS direct exposing technology in the market
- In-line automation, less handling, lower costs
- Full development in automation
- No retouching
- Much better printing results, more output and higher flexibility.

**TEXTILE-FASHION T-SHIRT PRINTERS PRO SCREEN-PRINTING TECHNOLOGY:**

Industry comments after more 15,000 stencils per year on STM-TEX:

- Faster screen production
- Stencil making department is no longer the production "bottleneck"
- The "bottleneck" is moved to image department
- Easy handling in a fully automated one step process
- Four-colour process with real 1270dpi is standard, easy, predictable and repeatable (photo-realistic)
- Absolutely balanced grey tone scales resulting in high degree of reproducibility
- Fast sampling process
- No need to keep stencils in stock for job repeating
- Electronic registrations reduce print set-up times and lead to higher print productivity
- Digital prepress STM-TEX (CtS) improves existing screen-printing plant layout (ROI)
- Fewer numbers of colours (CMYK based + solid colors + 3D effects as an unique and repeatable standard
- Final print based on four-colour process like sublimation
- High degrees of flexibility, no fabric limitations, no colour intensities, better touch and an economical efficient process

- Digital pre-press is a "must" on textile T-shirt printing

**NEW INK SYSTEMS:**

Taking in consideration the advantages of digital CtS pre-press technology on modern textile printing by piece, such as the high resolution four-colour process which is fully standardised, it's time to stop and think of the advantages coming from innovative ink systems including those presented by the renamed Italian company Quaglia with its water based Colorsinprocess 4You. This is a four-colour printing highly qualitative and competitive ink system that followed one year of intensive research – <http://www.virusinks.com/4you.php>

**THE GREAT OPPORTUNITY?**

TTIP: create the world's largest space of prosperity  
 TTIP – the Transatlantic Trade and Investment Partnership or, in other words, the free trade agreement which the European Union and United States are negotiating, may be the most wonderful opportunity that has presented itself to the old continent since the post-war period, and since the Marshall Plan (the European Recovery Program or ERP). Portugal can be, on its scale, one of the countries that has benefited more.

*Continued over*

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STM-TEX is said to be the fastest CIS direct exposing technology in the market

Unfortunately the local media, such as in most European Union countries, is not giving this due importance or, when it confers, it insists on side issues, minors, only voicing the heralds of an anachronistic ideological prejudice of being 'anti-American', and blurring the essential.

**WHAT'S ESSENTIAL?**

In first place, TTIP can refocus the geopolitical and geo-economic epicentre of the world in the North Atlantic, creating the greater economic and political interdependence zone ever known. This is because it unites the two largest global spaces, the USA and the European Union, whether in the area of representative democracy as in the trade field or on the increment of mutual investment. Fortunately, the USA understands well and easily a Europe that is threatened by its own integrity, and that is in question. We are no longer considering in this equation the natural extension of the great common economic area in the South Atlantic, giving finally relevance to emerging economies like Brazil or Angola. For reasons or circumstances, these areas have been always well short of their potential, and that, at times can be liable to weaken the global economy, expose painfully frailties and shortcomings.

In the second place, because a new map is being drawn in the energy world, in this area power relation is in rapid change. The USA's self-sufficiency in the energy sector with shale gas is a denominator which, in addition to abundance in American territories, is particularly cheap to produce. This will determine, on the one hand, some relocation since essential productive factors with the power to head become clearly competitive and will, in the near future, export these energy resources. An alternative to Russian gas and resources from the South Mediterranean basin is, at the same time, taking over as one of the leading suppliers of coal now in surplus in the USA to industrialised Europe (namely Germany which is to shut down its nuclear power plants) and to China whose reserves are insufficient to maintain the growth rate of the last decade.

Finally, the free trade agreement with the USA will allow the dismantling of important



The 4C water-based ink system

tariff barriers (existing in products, in particular textiles with tariff peaks exceeding 20%) and regulatory harmonisation in the technical field. These rules of origin are in order to make all processes much more transparent and simpler than those we know today.

Free trade is unambiguously good. It creates competitiveness and growth, promotes innovation, creativity and efficiency in all areas. Obviously, fundamental principles of reciprocity are guaranteed which, as we know, have not been secured by simple incompetence or deliberate primary greed with the entry of China into the WTO. The USA and the European Union are at the same level of civilisation, and are the most developed and prosperous spaces. They have developed and are egalitarian on the distribution of wealth and welfare that exists in the world. This is why there should be nothing to fear about repeating the mistakes of the past, because the conditions are totally different.

As a serious consideration, only for the Portuguese textiles and clothing sectors might result with gains in an export growth of close to €600 million in just four years after the conclusion of the agreement. This means



Direct textile fashion prints produced using four-colour process at 1270dpi

more than double the current sales to that country. And there are many other sectors of our traditional activities, such as footwear, metalworking or furnishings that have the same perspectives.

Having unwavering strategic determination and statesmanship of the Portuguese political class, plus the capacity from the sides of companies, brings opportunities to grow and to prepare. Intentions can be realised, leaving no failures as so often in the past, and ensuring there is no repeat of the rendezvous with history. This time it is written in the future.

As a final question – why did the European Parliament vote massively in favour of the introduction of Labels of Origin use obligation on textile goods in Europe? Is the final decision 'lost' in some drawer in Brussels? ■

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