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DEVELOPMENT TRENDS OF GLOBAL LINEN FABRIC

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According to experts, flax makes up about 1–1.5 % of all textile fibers consumed in the world. Linen fabrics are used to make such types of products as: clothes, table and kitchen utensils, towels and other items for the bathroom, bed linen and other items for the bedroom, curtains, blankets and pillows. Smooth and light linen fabric is used for the production of clothes, coarse and thick linen fabric is mainly used to make towels, bags and tablecloths. Currently, more than 70 % of linen is used for the production of clothing [1, 2].

Flax is grown in all countries of the world, but most of it (80–85 %) grows in Western Europe. The largest flax crops in Europe are located along a wide coastal strip stretching from the south of Normandy to Northern France through Belgium and the Netherlands. According to the European Confederation of Flax and Hemp (CELC), about 0.5 % of flax grown in Europe is organic. The Made-By environmental test for fibers gives inorganic flax a grade of "C" and organic flax the highest grade of "A." Also countries such as Spain, Egypt, Russia and China are major producers of linen fabric.

The main regional markets for linen fabric are North America, Europe, Asia Pacific, Latin America, the Middle East and Africa.

The world market for linen fabric is highly fragmented: the leading manufacturers account for about 10–20% of the market. Major linen fabric manufacturers: World Linen & Textile Company Inc, Grasim Industries Limited, China Linen Textile Industry Ltd, Ralph Lauren Corporation, Flax Company SARL, Northern Linen BV and Libeco NV and others. Linen fabric producers in Russia and Belarus: VLK LLC, Yartsevskaya Factory LLC, BLK LLC, Balina Manufactory LLC, Vyshnevolotsk Flax Factory CJSC, RUPTP Orshansky Flax Factory.

The analysis showed that the key exporters of linen fabric in the world are currently three countries - Italy, China and Belgium. In 2020, the volume of exports of these countries amounted to 188.07 million US dollars, 158.15 million US dollars and 97.5 million US dollars, respectively, the shares of these countries in world exports amounted to 21 %, 17.7 % and 10.9 %, respectively. It should be noted that during 2011–2018 the leading position in the export of linen fabrics belonged to China, but in 2019 the leadership passed to Italy. The loss of China's leading position in the export of flax is due to a reduction in acreage, an increase in labor costs, an increase in logistics costs, a trade war with the United States, as a result of which orders are redirected to other countries of Southeast Asia (Vietnam, Indonesia, India, Bangladesh)[3].

India and the UK are also among the top five exporters in 2020. As a positive, it should be noted that in 2020 Belarus ranked 6th in the world export of linen fabric with a share of 4.39 %.

World marketing agencies make the following forecasts regarding the demand for linen fabric and clothing: demand growth is expected in China and India, which is due to the

increase in the purchasing power of the population; the European and North American market will grow at a moderate pace. As consumers who are accustomed to wearing linen clothes rarely give up on them.

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COMPETITIVE ADVANTAGES OF COUNTRIES ON THE MARKETS OF TEXTILE AND SEWING PRODUCTS

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The article is devoted to the state of the textile and clothing industries of the world exporting countries. Export markets for textiles and apparel are growing and the textile and apparel industry is recognized as one of the most resilient in the world. Thanks to the export of textiles and clothing, exporting countries stimulate and increase the competitiveness of the local and regional economies, the country's economy as a whole, ensure the diversification of exports and increase its share in the world market. The TOP 10 world's leading exporters of textiles and apparel include such countries as: China, Germany, Bangladesh, Vietnam, India, Italy, Turkey, United States of America, Hong Kong, Spain [1,2].

China is the recognized leader in the world market, its exports in 2018 amounted to 266.41 billion US dollars. The industry's competitive advantages are low-cost production, good quality raw materials, and modern high-tech equipment. Germany is one of the largest exporters of knitted apparel, man-made fibers, synthetic yarns and textile machinery (exports in 2018 – \$ 38.99 billion).

Bangladesh has developed into a clothing manufacturing hub in recent decades. Competitive advantages of the country's textile and clothing industry – affordable cheap labor, use of advanced technologies, high quality products, receiving large orders for the production of products with high added value from well-known brands.

The advantages of Vietnam's industry are low labor costs and an orientation towards specialization, modernization and increased product value added.

The competitive advantage of India's industry is cheap labor. In 2018, the country exported textiles and apparel worth \$ 37.11 billion.