

The conjuncture of the Brazilian textile and apparel industry for the World and the relevance of Triple Bottom Line

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Abstract— The Brazilian industry is passing by a very common situation as many industries present in other countries. It means a difficulty to compete with Asian industries by several factors. His situation demonstrates a number of opportunities that are not applied by a culture imbued in the sector, even in broad profile change hardly puts into practice solutions for the internal strengthening. Identify possible reasons that keep the industry to a negative environment is a basic requirement for an early gain and improvement market, especially with regard to facing internal and external competition in the country, which in globalization factors are presented each increasingly strengthened and drop the Brazilian industry in several sectors of this segment, no different in the Brazilian textile and clothing industry. By identifying these specific factors of these sectors, becomes more pragmatic the research of possible solutions to an improvement in a structured environment or change profile, generating more representative force in the face of competition and demand for change of government policy stance with actions of the textile and clothing manufacturer Brazilian protection. In addition to a cyclical study, present the relevance of sustainability in its broad concept form (Triple Bottom Line) as strengthening this important alternative chain for Brazil and the world.

Keywords—Apparel industry, economic conjuncture, management systems, marketing, triple bottom line.

I. INTRODUCTION

MANY are the reasons that can influence industries, but some aspects are specific to certain sectors. In the information age the planet accelerates its globalization factors. The speed with which information travels on the planet generates a preview of simultaneity such information for virtually all residents. So what happens now on the other side of the Earth is displayed "online" anywhere in the world. In view of the innovations offered to the industry, though implicit, the largest competitors in Brazil are no longer regional, within municipalities or states, but outside the national territory. Since man discovered various forms of transit through the world through new transport formats, methods of communication and logistics planning, the boundaries were reduced to geopolitical.

Brazil, one of the largest fashion consumer markets in the

world, fifth in World Ranking segment in consumption of finished clothes, passes for a moment that cannot be considered peculiar. In a report, ABIT, Brazilian Association of Textile and Clothing, reports the increase in imports of made-up finished on 23 times between 2003 and 2013. The consumption between 2000 and 2012 grew by approximately 20% (ABIT, 2013). Soon the reason for a bad situation in the sector can be detected through a situational analysis. Like other sectors, the marketing competition changed its profile.

The formation of price depends on a number of factors added as overhead costs and initial investment, added value to the product, brand positioning in the market, among others. For the textile and clothing manufacturer industry in Brazil, find out how to transpose the competition barriers and influencing factors that generate market barriers is the greatest challenge of the current industries seeking to survive and grow in a market that gained planetary boundaries. Regionalism has become a major pitfall that most often is armed by yourself. The obvious information that represents the current profile of the industry can be seen in Figure 1, which shows the ranking of countries exporting textiles and clothing in 2012. China ranks first in both segments, textiles and clothing, as well ahead of all other countries that are major importers of the same China.

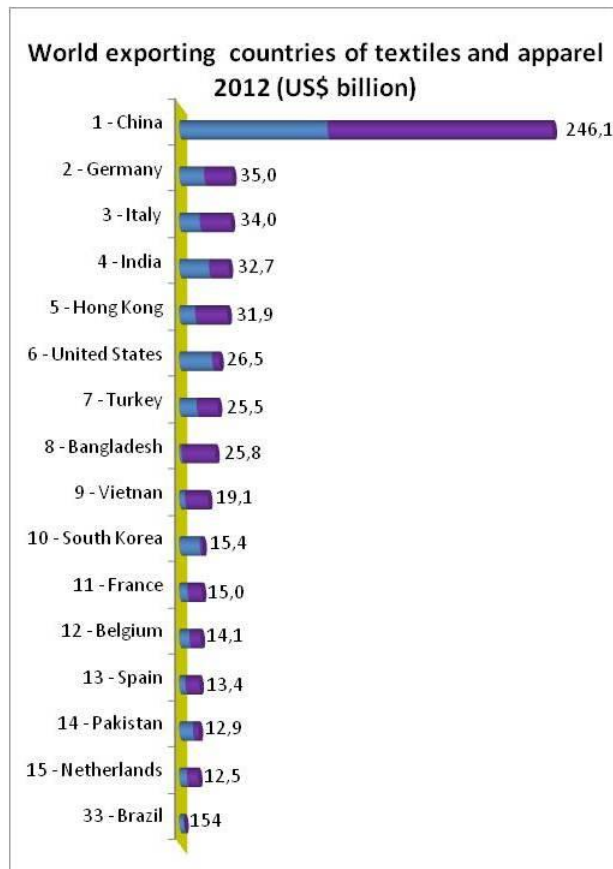


Gráfico 1: World exporting countries of textiles and apparel 2012 (US\$ billion). Font: PRADO, 2013

The result generated by the concentration of productive source generates de-industrialization, breaking the industrial chain and soaking the market for finished products. The result of this strand break (Figure 1) is the increase of twenty-three times the import of finished products between 2003 and 2013, reducing the chances of the domestic industry offer similar products due to the low cost of production and price of the items produced by the great Asian countries, especially China.

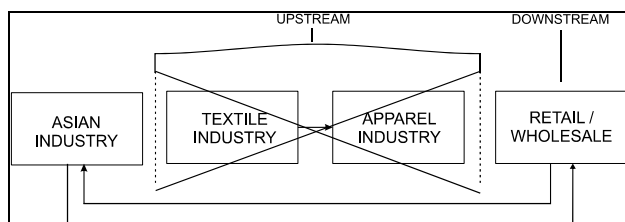


Figure 1: The breaking of the textile / apparel industry chain direct access to retail / wholesale
Font: Autor, 2015

Thus it is clear that companies that have access to import, offer products at a lower cost to the whole chain of the domestic industry. By demanding items from outside, the requesting companies avoid completely the national chain, eliminating the chances of favoring domestic industry chain (ABIT, 2013).

II. PROBLEM FORMULATION

There are many arguments that are presented by the representation of a particular industry that exposes their dissatisfaction with a negative situation. Compared with large textile industries and current world clothing, the Brazilian industry is going through a very critical time. According to a report presented by the Brazilian Association of Textile and Clothing (PRADO, 2012), the factors that have the greatest influence are consecutively tax burden, deficiency in trade protection, high cost of capital, cost of infrastructure, growth of imports, exchange imbalance and more currently the newest villain of the textile and clothing manufacturer chain tourism informal imports.

Elaborate on these factors demonstrate so uncover the real situation that the sector is and has posture possibilities of change through more appropriate and balanced behavior. It also facilitates coping with exacerbated competitions in and out of a country. "The tax burden, infrastructure, bureaucracy and the exchange rate leave the national product, not only the clothes, but the products and services generally a little more expensive than the products found abroad (BARROS, 2014)."

III. TAX BURDEN

The textile and clothing manufacturer national industry positions Brazil as fourth in the world rankings in the production of clothing and placed fifth in the textile area demonstrating the significant importance that this industry has with the Brazilian industry (ABIT, 2013). When joined the textile and clothing manufacturer chain is in second place in the national manufacturing industry represented almost 5% of gross domestic product in the manufacturing industry and more than 10% of the jobs in this economic activity, resulting in 6.8% of domestic product crude and 16.5% share in the formation of formal jobs in all layers of the Brazilian industrial chain.

While demonstrating strength and representativeness economic policies make a counter force to the incentive needs to the sector that has the highest tax burden in the manufacturing industry. The load is 59.8% of gross domestic product of the textile and clothing manufacturer chain is the largest in the manufacturing sector according to the Brazilian Institute of Geography and Statistics (IBGE, 2014).

The high tax burden drives current managers to look for other ways to reduce the costs of their companies like informality. The high cost of production, generated by large imposing taxes, and assessments, causes leakage of shares of small factions that use of said methods as "politically incorrect" to ease the pressure of these big companies that can buy these small factions or ask imports. The problem of informality is the consequences that these may generate, as lack of revenue for the government an answer with conditions and policies of protectionism to the industry (BARCELOS, 2012).

IV. DIFICULTIES IN TRADE DEFENSE

According to the Brazilian Foreign Trade Portal (COMEX, 2015), the DECOM (Commercial Department of Defense), defined as the use of trade defense instruments that has the intention to defend the national production of unfair trade practices by other countries shows no studies that could support or prove dumping policies that could harm the domestic industry.

The national trade balance shows easily the deficiency in trade defense when it identifies that the result is negative. The absence of protectionist rules results in an advantage in acquiring imported products that even with import rates on them have lower costs than items produced by the domestic industry.

The closure of the trade balance of the textile and clothing closed at US \$ 5.9 billion deficit with a drop of 6.7% in exports, a 4.8% increase in imports and decrease of 4.8% in turnover which reached US \$ 55.4 billion. Market estimates indicate that GDP will not grow in 2015. Based on this, Abit estimates that textile production will grow by only 0.3%, while 0.7% will manufacture and retail of clothing, 0.4%. The trade balance will be even worse than that recorded in 2014: deficit of \$ 6.13 billion (ABIT, 2015).

Still ABIT (2015) says in a report that there are other factors that weaken the trade balance of the sector as the economic downturn devaluation of the Real, off you stand adjustments resulting from the negative trade balance, high interest rates and credit access difficulties, water and energy crisis, plus the poor performance of the global economy and low commodity. The result of the combination of these factors can be better understood in the following chapters.

V. HIGH CAPITAL COAST

The cost of capital can be represented by the interest rate that companies use to calculate, discounting or composing, the value of money over time (ATKISON et. AL., 2000). It is calculated considering the cost of resources from all sources, made available to the company, and taking into account the percentage share of each source (equity and third).

The Brazilian cost of capital does not follow the rise of interest or national general inflation making the textile and clothing manufacturer sector an anchor in raising the national inflation. The correction Clothing prices in 20 years of the Real Plan is less than 60% of the accumulated inflation in the period as analyzed by the IPCA which is the National Index of Consumer Price (IBGE, 2014).

Theoretically it is favorable to a particular economic conditions of a country an industry that serves as inflation anchor retaining the rampant increase in prices that may shake their structures and goals. But for this anchor sector, it is necessary to identify whether being positive for it to be an influencer of low inflation rates for the economy of a country.

In the case of textiles and garments such unfavorable results are demonstrating that there is a follow before products show similar relative positioning of consumer needs. Mainly because

of the sector's situation show a negative trade balance, studied in more detail in Section VIII.

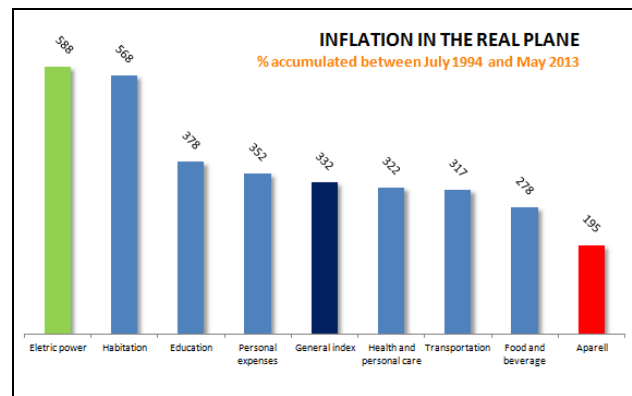


Gráfico 2: Inflation in the Real Plan in accordance with the Consumer Price Index by Industry
Fonte: IBGE, 2013

VI. INFRAESTRUTURA COAST

Another charge that creates barriers for the textile and clothing manufacturer chain in Brazil is energy pricing. The electricity tariff of Brazil is one of the most expensive in the world second only to Italy.

According to the Energy Information Administration EIA-Canada is the country that has the most similar energy matrix of Brazil, but with 64% charging unless the Brazil (FIESP, 2013). All these factors together generate Brazil a de-industrialization process that generated a drop of approximately 11% between 1985 and 2010, especially when the import and export ports were opened in response to globalization the planet passed the end of the previous millennium and the current millennium. Also affect the labor demand that other sectors is affected by factors such as low wages, low investment, low demand for trainers institutes of the area and after looking for other more promising sectors and better conditions of future prospects and salary.

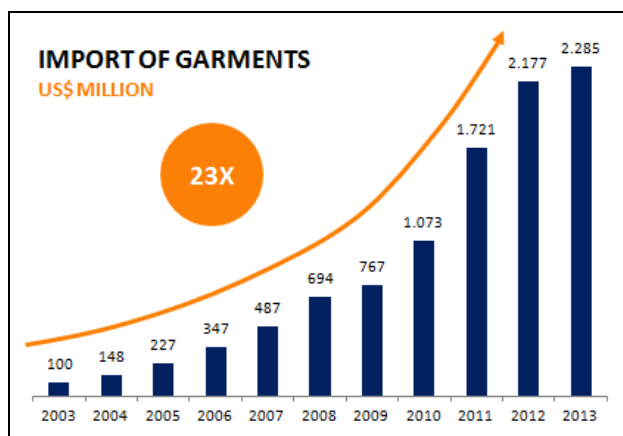
Between 2014 and 2015, energy and water deficits generated by the long drought registered with lack of rain and high consumption of water and electricity, generated a high price these resources that are vital for the textile and clothing manufacturer industry. Therefore, in 2015 already has a 0.5% drop perspective in textile production, 0.1% in the production of made-up and a shopping consumption by 0.24% in the clothing retail, which can increase the cost of infrastructure industries. This also generates a perspective of loss of 4,000 jobs in the textile and clothing manufacturer industrial chain.

VII. IMPORT GROWTH

The textile chain and national clothing manufacturer is composed of several layers ranging from the production of chemical or natural fibers, spinning, weaving and fabric finishing plans or knitting, making clothing items, bed and bath to get consumer's hands end through domestic trade or export. The domestic industry has been hampered by constant imports ranging from yarn to finished products.

Brazil does not produce industrialization of machinery, ie machines that do the processing of inputs, importing mostly equipment that structure the domestic industry. Thus, it is perfectly possible to employ the hand of necessary work for the sector. But when the import of inputs and to the finished items beyond all the chain the whole sector suffers from breakage.

The import of clothes ready prevents all chain layers employ, pay the operating costs and maintain a healthy competitiveness in domestic and foreign markets to Brazil. This factor is demonstrated by the growth of imports in twenty-three times before the attire with finished products between the years 2003 and 2013 industry according to the Analysis System of Foreign Trade Web Information (Aliceweb, 2013). In the graph below you can see better the timely import growth in US \$ million of finished clothing items, which break the textile and clothing industry national chain.



Grafic 3: Import of finished items in millions of \$ of clothing between 2003 and 2013.
Font: ALICEWeb, 2013

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VIII. TRADE IMBALANCE

Commonly the greater villain is the national overcharge. But indifferent to taxation exist other actions that could be taken to achieve a more cost effective and better coping physically distant competitions in Brazil and easily earn its domestic industry. A good demonstration of this situation is in the frame of the persons employed in the textile chain. There was a drop of 3.6% in the textile sector and 2.7% in made between 2009 and 2013. The clothing segments to the home line and knitting had the largest declines, -12.4% and -10, 6%, respectively. However, when analyzing the average number of employees per company, the table shows that in the 2009-2013 period there was a decline in both the textile sector and in made-up, which may mean a higher level of automation and

modernization of the sector, generating hand replacement work or increase import of finished items (PRADO, PRADO. 2014).

Another factor pointing this unfavorable situation is the trade balance of the textile and clothing manufacturer sector which shows a marked decrease of approximately 19% (2013, SECEX) as seen in the following table demonstrated by the Secretariat of Foreign Trade. This table shows the sum of fibers and filaments, textile manufacturing and finished made up between 2010 and 2012.

Trade balance (US\$ millions)			
Segment	2010	2011	2012
Fibers / filaments	59	371	1236
Manufactured Textiles	-1936	-2198	-2207
Finished clothing	-907	-1762	-2327
Total	-2784	-3589	-3298

Table 1: Balance of trade items and Textiles Made up between 2010 and 2012.

Font: 2013, SECEX

As the cost of finished products imported is very low the cost of imports of machinery and equipment also declined in the last 20 years and has been forming a new industry profile, sprayed through micro and small enterprises in full restructuring in its business chain. Summed up by the great Brazilian entrepreneur power found access to credit and the initial investment reduction for starting a business. Without proper and official records, there is no proper estimate of how many thousands of entrepreneurs have taken a proper attitude of management in the last 20 years. This would be another factor that affect the sector: informality.

Adequate information on all hierarchical levels of these small and micro companies better prepare the domestic industry through a repositioning or profile change in training costs or how to add more value to products through strengthening brand or quality and distribution attributes. Best exploitations or academic training management to operational levels would be another solution.

There are growth chances if the actions are positive. Just as the imported products have low cost now, their tendency is to increase the price over the years through the workforce enhancement and resource scarcity. The same access to information competition has, we also have. Just make use wisely. It is natural to the emergence of a saturation point and balance to the point that the global industry to gain access to information, distribution of technology and emergence of union forces before the labor.

The unknown would be in that historical moment this balance was to provide representative and relevant way for the industry in the world and in particular to Brazil. The possibility that is too late for a frame reversal is great if the de-industrialization reach insoluble values for the 2nd largest national manufacturing industry (ABIT, 2012).

IX. THE TRIPLE BOTTOM LINE

Several concepts of sustainability exalt the environment as a primary focus. The more accurate term would be in the sustainable development of conjugation. This resume a set of

paradigms for the use of resources designed to meet human needs. This term was created in 1987 in the United Nations Brundtland Report. It was established that sustainable development is development that meets the needs of the present without compromising the ability of future generations to meet their own needs (TORRESI; PARDINI; FERREIRA, 2010).

More recently other concepts of sustainability or sustainable development have been studied and commented, formulating new concepts, eliminating barriers that restrict the sustainability something related exclusively to environmentalism. BURSZTYN et al, (1993), mention the Environment and Sustainability in five dimensions: social, economic, ecological, spatial sustainability and cultural sustainability by introducing an important dimension of complexity.

The range of concepts close on a concept widely used lately by many scholars: Tripod Sustainability Triple Bottom Line. The triple bottom line allows companies to focus not only to the intentions of its shareholders through dividends and profits, but the simultaneous satisfaction of other stakeholders of society such as employees, communities, customers and others, through the best performance in the environmental and tripods social (SIGMA PROJECT, 2002).

The textile industry is experiencing a reconstruction models after globalization and is in need of more adequate concepts before the sustainability and primarily to the corporate social responsibility. Patricia Ashley et al. (2002) defines social responsibility "as a corporate commitment to the development of society expressed by their attitudes and values."

The devaluation of the sector because of the unskilled labor leads to a migration to more promising sectors of the current job market. The example of the Information Technology job market is a market where it generates more credibility because of the high demand on account of the newly formed and supply of the contractors, who are more adapted to new management systems that are more concerned with issues such as social responsibility, especially as factors related to quality of life of employees. Even so, there is still a shortage of candidates for the high demand of offered vacancies presented (WAACK, 2011).

What is striking, that the worsening of social and environmental problems across the globe - unemployment, exclusion, pollution, depletion of natural resources - and the difficulty of governments to solve them, the forces of society are going through a process of reorganization. In this context, companies feel pressure to adopt a socially responsible attitude in the conduct of their business. Companies become aware thus the importance of considering the interests of other groups, not only of the shareholders affected by corporate behavior: suppliers, employees, community, consumers, society and environment. The very notion of business success is being questioned, by exchanging the background of the only economic results for a scenario that also requires social and environmental outcomes, within a perspective of sustainable development (COUTINHO; SOARES, 2002).

The strategic dimension demonstrates a new focus towards social responsibility to the extent that it can contribute to

greater competitiveness, as it represents a more motivating and efficient working environment, contributing to a positive corporate image and encourage the establishment of relationships grounded in greater commitment with its business partners (MARTINELLI, 1997).

When the subject is sustainability, environmental issues are usually placed on the agenda. As previously mentioned, most current sustainability issues are not related exclusively to the environment, but the other precepts which are connected society and economy. According to Cirelli and Kassai (2010), sustainability concepts from the viewpoint of triple bottom line, are values and procedures that companies should set up to reduce impacts of its operations and add economic, social and environmental value. In Figure 2, you can better understand the sustainability of form illustrated viewing these precepts.

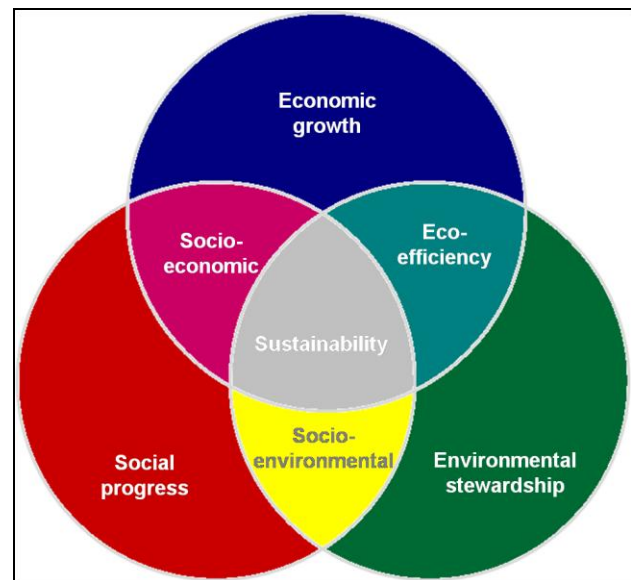


Figure 2: The Triple Bottom Line
Font: CIMA, 2015

According Elkington (1998), sustainability follows the three economic, social and environmental considerations, but before the following solicitations:

- Eco-efficient: to be eco-efficient you must meet at least the economic and environmental principles, meeting all expectations related to these concepts;
- Social and environmental: to meet the socio-environmental precept you must meet all social and environmental considerations to be applied to business. As for social concepts, some are required before the labor jurisdiction and meet other improvement issues as quality of life of employees and the product life cycle in the hands of end users;
- Socio-economic: Similar to socio-environmental structure, you must meet at least the applied social issues and less legal economic obligations of you stand responsibilities for the company's existence in the market.

In the center of Figure 2 you can see a triangle representing the three sides of the tripod. But all results must subject the company to obtain a tangible way to profit growth in the same where you can not leave any of the tripod tips. According

ABREU et al. (2008) a company is following the precepts of the triple bottom line gets when economic prosperity, social justice and environmental protection, within its core operations and essentially making the leap from theory to practice sustainability.

X. PROBLEM SOLUTION

The research presented points to a de-industrialization of the sector which shows various internal tariff barriers and few policies to encourage the textile and clothing industry which has as major competitors not only sectoral industries in other countries and the domestic industry, but the lack of policies investment to improve protectionist one that is a niche of grandeur and expression for the Brazilian industry, forming more 1.66 million jobs in the country, with 32,652 formal companies in activity and an average income of 56.7 billion dollars only in 2012 according to the Institute of Industrial Studies and Marketing (PRADO, PRADO. 2013).

The use of sustainability tools in your amplified form, that is, through the triple bottom line, present alternatives beyond the expected policies or representative drives the industry to encourage the textile and clothing industry in full from the social, environmental and economic. Seeking tools standardization and certification, seek a greater range of solutions through innovation in processes and products, without abandoning their legal / tax liabilities, a profit appropriately for reinvestment and greater perpetuation of the sector.

However, the development and implementation of policy barriers that at least equip the level of prices and competitive conditions coping could offer more conditions to a booming market and activity, which goes through a micro spray and small companies in training their culture management and governance.

Another way solution would be through incentive plans to micro, small and medium enterprise that presents avid tools to strengthen and establish competitive partnership systems, that is, within the national competitive market the formation of competitive partnerships in order to improve the recognition of the needs of consumer and industrial market methods, since the formation of industrial parks to the use of more appropriate sustainability tools to current levels of national and global industry.

Also the approach of organizations, unions and political representations of the trainers of the textile chain and clothing would be useful for structuring committees to study and represent the tools and industry needs as well as the participation of craft of academic institutes from the hand of training skilled labor to education specializing in the management or research advances in the industry.

Finally a study that aims to new models of development, production and supply of products to flee the production of basic commodities sector. Thus offer products with more specific quality or do not come in direct competition with those offered by the major internal and external competitors, again placing the textile and clothing industry as a trainer Brazilian market opinion or competitive advantage model for end consumer.

XI. PROBLEM SOLUTION

It is true that currently factors like bureaucracy, political and economic conditions are not favorable to the change required for textile and clothing sufficient to reposition it as one of the largest industries in the sector to the global competitive market. In view of the situation of globalizing factors, profile and position governments adopted by developing countries and especially the Brazilian government will not be taken actions to encourage the breeding of domestic industry. So there's no waiting for a change of government attitude that would bring great benefits to the sector or the creation of protectionist policies that diminish the strength competition before countries can even use dumping to weaken the industry of its major competitors and potential customers.

Therefore the most appropriate action would be in joint forces of the stakeholders involved as representative bodies of the textile sector and the domestic apparel, craft academic institutions, companies with the highest market share with representation of strength and active workers to set up a committee together with In order to submit proposals to strengthen and adopt participatory competition and cooperative models to seal exacerbated import doors and coping unfair competition from countries with favorable political conditions only to its domestic industry.

Another alternative is the implementation of actions for each of the triple bottom line. In the social sphere, through investment in academic quality and life of each employee, generating quality work of more labor, which increases the production for items with more innovative factors and less commodities. In the economic sphere through management methods and appropriate management, in order to better cope with the fees and taxes on products with higher added value and higher profit margin. This formal growth also generates more credibility for access to credit for studied and planned investments. In environmental issues, best results in the use of resources as raw material, energy and water sources, which are increasingly expensive, taxed and scarce.

It should also be considered the mobilization of the sector, for the formation of a new attitude towards the internal market suffering unfair competition by the absence of their own protectionist policies, thus creating a better balance before shopping and to prospectively balance before export to other foreign markets.

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