Overview Study of the Textile Industry in Georgia: Emerging Trends and Patterns

by

Dr. John R. McIntyre
Professor of International Business and Executive Director
Center for International Business Education & Research
DuPree School of Management
Georgia Tech, Atlanta, Georgia

June 21, 1997

TABLE OF CONTENTS

I. The Textile Industry in the U.S.: The Macro-Picture—An Industry at a “Strategic Inflection Point”
I. The Textile Industry in the U.S.: The Macro-Picture—An Industry at a “Strategic Inflection Point”

With only 5% of the world’s population and 14% of the world’s textile mill output, the U.S., because of its high standard of living, consumes about 20% of the world’s textiles and receives more than 21% of the world’s textile and apparel imports.

As a country in the full textile maturity stage (see Toyne et al., The Global Textile Industry, 1984, for the five stages of textile levels of development), the U.S. textile industry is at a “strategic inflection point,” a concept recently explained by Andrew Grove, Chairman of Intel Corp., the world’s largest producer of microprocessors. Grove states that “an (industry) inflection point occurs where the old strategic picture dissolves and gives way to the new, allowing the business to ascend to new heights...put another way, a strategic inflection point is when the balance of forces shifts from the old
structure, from the old ways of doing business and the old ways of competing to the new.”

The “old way” of doing business in the textile industry is characterized by fighting imports, not fully recognizing opportunities for export markets, and minimizing capital R&D investment for labor-saving production equipment. The so-called “new way” is characterized, among other things, by using a combination of effective brand recognition and marketing coupled with capital investment, and technologies focused on “quick response” systems to link producers and modular manufacturing. This strategic inflection is driven by the remarkable accelerating globalization requiring new strategies to survive in increasingly competitive markets. A new quota-free market, under the World Trade Organization regime, will come about by 2005. Quotas and tariff restraints will largely disappear although less visible non-tariff barriers will continue. Even in the U.S., which has a highly competitive textile industry, if there is to be a growth rate, aside from productivity gains, it must come substantially from export markets.

Let us review, in point form, the most salient consumption, production, and productivity characteristics of the U.S. textile industry at large as of 1996-97, using data from the American Textile Manufacturers’ Institute and various sources of information obtained through data base searches. These average industry characteristics have high relevance to Georgia’s own textile industry and apply directly in many of the Georgia textile subsectors such as apparel and garment. Carpet remains a special case for the Georgia industry because of its size and is dealt separately in the second part of this overview study.

1. The U.S. industry has recovered strongly from the early 1990’s and has enjoyed banner years in 1992, 1993, and 1994. However, in 1995, the industry slowed. It began a strong recovery in mid-1996 and textile corporate sales rose nearly four percent to $68.9 million for year 1996.

2. In 1996, U.S. consumers spent more than $260 billion on apparel and over $250 billion on home furnishing products. Americans purchased 1.3 billion pairs of trousers, 3.2 billion shirts and blouses, 500 million sweaters, and 675 million active-wear garments.

3. In 1996, 43 billion square yards of fabric was consumed domestically. This figure includes fabric from all sources (domestic and imported) and in all forms (woven, knit, nonwoven, and tufted). This textile consumption equals more than 13,500 square miles of fabric or 154 square yards per person; in weight terms, almost 20.2 billion pounds of fiber were consumed or approximately 76 pounds of fiber per person (population of 265 million in the US).

4. This the highest per-capita fiber consumption in the developed world, easily exceeding the world average of 16.3 pounds and the developed-world average of 41.2 pounds, and the developing-world average of 9.0 pounds. The 1992 U.S. figure indicates that the U.S. per capita fiber consumption was 36 percent higher than that of Japan, the next highest per-capita fiber consuming country. (1993 UN/FAO apparel fiber per-capita consumption study figures: 64.2 lbs/US; 47.2 lbs/Japan; 37.3lbs/EU; 41.1 lbs./Canada; 6.2lbs/India).

5. A noteworthy consumption trend for the US market, since 1990, is that per-capita fiber consumption has increased about 15% per year as the carpet market has surged and the consumption of
such heavy weight fabrics as denim, upholstery, and fleece has increased. This trend is a function of the development of new uses for fibers and textiles.

6. U.S. mill fiber consumption has increased at nearly three percent per year since 1986 as heavier weight fabrics have become more popular and as the carpet market has surged in response to a healthy housing market. Man-made fibers account for two-thirds versus one-third for cotton of a total domestic U.S. consumption of 16.0 billion pounds of mill fiber in year 1996.

7. A 1996 analysis in Fiber Organon shows that the 16.0 billion pounds of U.S. mill fiber consumption was broken down in the following use categories or subsectors:
   • 41% in apparel (hosiery, sweaters, underwear, nightwear, linings, shorts, blouses, trousers);
   • 15% in home furnishings (bedspreads, blankets, sheets, pillowcases, towels, curtains, drapes, upholstery);
   • 22% in floor coverings (carpets and rugs, both face fiber and backing); and
   • 22% in industrial uses (tires, industrial hose and belts, medical uses, stuffing materials, felts, filtration, rope, sewing thread, tape reinforcement, coated fabrics, transportation fabrics, bags).

8. There are more than 26,000 companies involved in the U.S. textile industry. The breakdown is roughly as follows:
   • less than fifty are manufactured fiber producers;
   • more than 5,000 are textile companies; and
   • 21,000 are involved in fabricated textiles (largely apparel).

9. Within Standard Industrial Classification Number 22, the number of company/mill breakdown by type, as of 1996, is:
   • 702 broad woven fabric mills;
   • 225 narrow fabric mills;
   • 385 carpet mills;
   • 529 hosiery mills;
   • 645 knit outerwear mills;
   • 56 knit underwear mills;
   • 344 weft knit fabric mills;
   • 254 lace and warp knit fabric mills;
   • 88 other knitting mills;
   • 216 yarn spinning mills;
   • 115 throwing and winding mills;
   • 48 thread mills;
   • 442 finishing companies;
   • 185 companies producing coated fabrics;
   • 13 producing tire cord and fabrics;
   • 144 producing nonwoven fabrics;
•190 producing cordage and twine; and
•536 companies producing other types of textile goods.

10. The U.S. textile industry represents approximately 10 percent of all manufacturing jobs at the national level and more than 20 percent of non-durable manufacturing employment. 1996 average employment in the textile industry was 636,000 while in the apparel industry it was 846,000. The manufacturing fibers industry shows employment of about 69,000 and the cotton/wool sectors represented 265,000 workers. Total compensation (wages) paid by the U.S. textile industry was $16.5 billion for 1996.

11. While textiles and/or apparel are produced in virtually every state, the textile industry is most important in the Southeast United States. In fact,
•North Carolina is the largest producer of textiles, represented 30% of the U.S. textile gross domestic product;
•in Georgia, textiles and apparel combined is the largest manufacturing employer in the state, representing 30% of manufacturing employment in the state;
•in Alabama, textiles and apparel combined is also the largest manufacturing employer, representing one third of manufacturing employment in the state.

12. In 1994, it was estimated that the overall textile industrial complex contributed approximately $60.6 billion to the U.S. Gross Domestic Product (of this, $25.6 billion came from textiles; $27.8 billion from apparel; and $7.2 billion from manufactured fibers).

13. In 1995, the textile industrial complex purchased $47.5 billion in goods and services from other industries. These purchases included $2.3 billion in gas and electricity and $2.9 billion in new plants and equipment as well as $2.9 billion in new plants and equipment.

14. New capital expenditures by the U.S. textile industry totaled nearly $2.9 billion in 1995, a 2.8% decline from the prior year. However, expenditures on new plants and equipment, by broadwoven fabric mills, which account for 36% of the industry total, increased by nearly $200 million. Nearly $2.4 billion, or more than 80 percent of the textile industry’s capital expenditures, went into new machinery and equipment. Plant and equipment expenditures by the industry have averaged more than $2 billion annually over the past decade.

15. Imports continue to be a major factor in the U.S. textile market. The trend line for textile and apparel imports, measured in square meter equivalents (SME), has been growing at an annual compound annual growth rate of 10.8% over the 1978 to 1996 period, and, in 1996, these imports increased 4.2% to 19.07 billion square meter equivalents. 1996’s import volume was more than twice the 1984 figure.

16. The nine largest sources of these imports were:
•Mexico (2.21 billion sme or 12 % of total)
•Canada (1.80 billion sme or 9%)
•China (1.65 billion sme or less than 9 %)
•Taiwan (1.20 billion sme or 6%)
• Honk Kong (0.89 billion sme or less than 5%)
• India (0.87 billion sme)
• South Korea (0.73 billion sme)
• Dominican Republic (0.72 billion sme) and
• Thailand (0.63 billion sme).

16. In 1995, the trade deficit for textiles and apparel increased more than 5 percent and accounted for 22.5% of the total U.S. trade deficit. The trade deficit for textiles alone (yarn, fabric, and made-ups) increased one percent in 1995 and accounted for 1.8 percent of the total U.S. trade deficit. During 1996, the overall textile trade deficit for textiles and apparel increased 2.5 percent to $36.7 billion. The apparel deficit, which accounted for 20.6% of the overall textile trade deficit, rose 3.7%. Apparel imports totaled 9.659 billion square meter equivalents (sme) during 1996, an increase of 4% from 1995 and Mexico was the number one apparel import source.

17. All in all, 1996 was a wild year for textile and apparel imports, characterized by volatility and uncertainty, but two recent and now firmly entrenched trends continue to manifest themselves:
  • repeated strong gains by the NAFTA partners of the US
  • continuing shift in offshore apparel sourcing from Asia to Mexico and the CBI countries (in 1996, Asia accounted for 40% of total apparel imports, while Mexico and CBI represented 34%).

18. Export markets for the U.S. industry have become increasingly important to the textile industry. In 1986, exports represented 4.5% of U.S. textile shipments; by 1996, the share of shipments held by exports had risen to 10.1%. U.S. exports of textiles and apparel together amounted to $15.1 billion. Apparel exports (particularly cut pieces for assembly outside of the U.S. in areas like the Caribbean) amounted to $7.3 billion of the overall export total.

19. Specialty and industry fabrics were the most important category of exports in 1996 ($1.283 billion). Other important export categories include: broadwoven fabrics of manufactured fibers ($1.054 billion); broadwoven fabrics of cotton ($910 million); floor coverings ($793 million).

20. The largest U.S. export markets for textiles (fabric, yarn, and made-up textile products) in 1996 for the US were: Canada ($2,125 million), Mexico ($1,191 million), the United Kingdom ($344 million), Japan ($299 million), the European Union ($1,137 million), and the countries of the Caribbean Basin Initiative (CBI) amounted to $622 million worth of exports.

21. NAFTA had a distinct impact in the form of enhanced U.S. exports. Exports of textile products (excluding apparel cut-pieces) to Mexico went from $523 million in 1991 to $1,191 million in "ffi" These three industries (apparel, carpet, and textile) consumed more than $250 million of electricity of which $213 million was supplied by Georgia Power Company. A survey by the University of Georgia put the total economic impact of these “big three” industries on the state at about $10 billion.

The Georgia carpet industry accounts for 74% of the total U.S. shipments of 1.4 billion square yards or $8.7 billion, based on 1992 data. More than 30,000 Georgians work for the specific carpet industry segment—vital to the northwest counties of Georgia. This represents about 35 percent of the
state’s textile employment. Average earnings per week for hourly production workers in the textile industry are approximately $425 or $22,100 annually. A study conducted for the Crafted with Pride in USA Council estimates that it would take 271 personal and business service jobs to offset the loss of 100 jobs in the Georgia carpet industry. This finding is particularly important in view of the increasing automation in this segment of the industry and the enhanced role of technology. It is estimated that productivity gains will be significant and pull down mill employment another 15% over an 11-year period ending in 2005.

Apparel, as opposed to the carpet segment, is more labor intensive. It employs about 60,000 people and has experienced battering competition from imported products over the past 15 years and more difficulties lie ahead. A major center for denim manufacturing, Georgia produces roughly one-third of the denim made in the U.S. and over 10 percent of the denim produced throughout the world.

Many analysts consider that Georgia’s apparel industry remains “under siege” as thousands of jobs continue to be lost to automation or exported to the low wage countries of Asia or Central America. The latest such news is from Delta Apparel Co. which announced it is closing plants in Sandersville and Ashburn, affecting nearly 500 employees. In the period 1981-1997, Georgia apparel workers have come down some 43%, according to the Georgia Labor Department. Jeffrey M. Humphreys, chief economic forecaster at the University of Georgia, is on record as stating that “labor-intensive plants cannot compete globally.” Ironically, it is automation that will save the apparel industry in Georgia and the U.S., more generally. Walter Rozelle, managing editor of Atlanta-based Textile World, has observed recently that one “always used to see 200 to 300 (manned) sewing machines in an apparel plant, and now you see 20 or 30 automated hemming machines that cost $750,000 a piece.” This means that the apparel segment must learn from its sister industry, the textiles segment, which is far more automated. This segment has stabilized its employment and is no longer in jeopardy.

This once labor-intensive segment of the industry has become far more capital intensive to compete globally. Marubeni Corporation (through its Swift Spinning Mills Inc. subsidiary) has just announced it will build in Columbus, Georgia a $61 million, state-of-the-art textile manufacturing plant to produce denim in March 1998 with 280 new workers.

A recent Georgia Tech economic study estimates that NAFTA may mean a near-term loss of 5,000 low-skill apparel jobs in Georgia between 1994 and 2000. The apparel industry is a primary employer of women and minorities. This Georgia industry segment faces specific technical challenges: quick response to customer orders, just-in-time delivery systems, waste disposal, repetitive motion disorders among workers and the introduction of increasingly high-tech machinery in a worker population undereducated.

Technological upgrading pervades the entire industry from fabric formation to bleaching technology and composite fabrics. A good case in point is DuPont’s streamlining of its nylon business. The firm is installing new equipment consolidating all nylon textile fiber production at its Chattanooga plant in nearby Tennessee. This is expected to cut costs by an astounding $700 million annually and improve quality of the fiber and customer responsiveness. In fact, yarn manufacturing productivity has
climbed more than eightfold from 1980 to 1996. Solid waste is a major concern as local landfills near carpet manufacturing areas reach their carrying capacity, with the industry generating approximately 35 million pounds of carpet scrap each year. A recent Georgia Tech Conference on Recycling of Fibrous Textile and Carpet Waste was held in Atlanta, May 19-21, 1997. It concluded that the recycling of post-industrial textile and fiber by-products is an industry of increasing importance for the Georgia economy. Moreover, the industry recycles nearly 50% of its fiber waste in Georgia which is then re-utilized in the manufacturing of ski parka insulation, mattress padding, automotive fabrics, diapers and sanitary products and tennis ball coverings.

The export performance of the Georgia textile industry is reviewed in tables 2, 3, and 4. Table 4 indicates that Georgia’s textile and apparel industries respectively rank eighth and eleventh in Georgia exports and have increased by 9.7% and 19% respectively from 1995 to 1996, indicating the positive impact of NAFTA. Tables 2 and 3 focus on Georgia textile exports to the NAFTA countries of Mexico and Canada. They indicate significant Georgia textile/apparel export growth from 1994 to 1996 to Mexico particularly and expanding market opportunities there.

Leading Georgia textile exports are:
• men’s and boys’ trousers and shorts,
• specialty industrial fabrics,
• broadwoven fabrics,
• floorcoverings,
• women’s and girls’ slacks and shorts,
• bed sheets and relating products.

An array of factors threatens the Georgia textile industry and its viability:
• Low-wage, environmentally-unfriendly economies of the Pacific Rim, Mexico, and CBI have pulled Georgia companies and their jobs offshore;
• cheaper imports have undercut segments of these industries, as identified in the previous national tends section above;
• workers’ compensation and increasingly stringent environmental regulations have raised non-productive costs;
• advanced technologies and methods have left poorly educated, undeveloped workers and their companies at a global disadvantage;
• trade issues, such as the North American Free Trade Agreement and the new World Trade Organization regime, have raised uncertainties about the future for textile firms.

In 1994, to respond to some of these challenges, the Georgia textile manufacturing industries and Georgia state government established the Consortium on Competitiveness for the Apparel, Carpet, and Textile Industries (CCACTI), an industry-driven research and technical assistance initiative which addresses critical technology needs facing the apparel, carpet, and textile industries. CCACTI funds
faculty and staff from seven universities in Georgia to work with these industries on their most pressing technical problems. In fiscal year 1996, funding was $1 million (R&D: $715,000, technical assistance to companies: $180,000, scientific educational programs: $60,000).

Industry leaders selected projects for CCACTI which addressed the following areas of concern to the Georgia textile industrial complex:

- water/air quality issues: CCACTI researchers are working to reduce, capture, and/or destroy hazardous materials in wastewater and air emissions;
- solid-waste disposal/recycling: CCACTI researchers are evaluating new methods for reducing or using solid waste byproducts. CCACTI is continuing research previously funded by the National Textile Center which developed technology to use carpet waste fiber as reinforcement material for concrete to improve its toughness and shrinkage properties;
- demand-activated manufacturing: a CCACTI team is helping five apparel manufacturers establish electronic links between their major textile suppliers and key retail customers. Benefits include reduced cycle times and inventory costs. All industry signs point to a more efficient and competitive industry, reflecting the electronic revolution. Coming on stream over the next few years, in Georgia and elsewhere, are quick response (QR) systems based on electronic data interchange (EDI) and modular manufacturing, taking advantage of the industries’ proximity to the most lucrative mass of consumers in the world in the U.S.
- educational programs: work force development and improvement is one of the Georgia industry’s most pressing needs. The task is to stay abreast of new technologies and processes in these industries. Beyond advanced training is the daunting task underlined in a 1997 U.S. Department of Labor study which concludes that production personnel in U.S. textile plants (and this is the case in Georgia) have an average 7th-8th grade education and new machine technology coming into the U.S. now requires an education level of 12-14 grades.

III. Conclusions: Forecasting 1997 and Industry Consolidation

All forecasting signs point to a good 1997 for the industry as a whole, with a slow and steady gains, though far from a banner year. Positive factors, in no particular order, mitigating in this direction include:

- stronger industry financial position,
- expectations of only moderate import gains, with no repeat of the double-digit advances of a few years ago,
- a leaner, more productive industry responding more quickly to changes in demand and technology,
- continuing investment in labor-saving, quality-improving machinery and equipment,
- modest upward price adjustments on the mill level (stronger demand),
- more manageable textile and apparel inventories (from one end of the chain to the other),
new stylings, in women’s wear, responding to consumers’ appetites,
• continued low interest rates to offset high consumer debt,
• a still-growing U.S. economy supporting more consumer purchases in apparel and homefurnishings.

But problems do persist. In particular, imports have moderated but remain too high. Imports have undercut segments of these industries, as identified in the previous national trends section above;
• workers’ compensation and increasingly stringent environmental regulations have raised non-productive costs;
• advanced technologies and methods have left poorly educated, undeveloped workers and their companies at a global disadvantage;
• trade issues, such as the North American Free Trade Agreement and the new World Trade Organization regime, have raised uncertainties about the future for textile firms.

In 1994, to respond to some of these challenges, the Georgia textile manufacturing industries and Georgia state government established the Consortium on Competitiveness for the Apparel, Carpet, and Textile Industries (CCACTI), an industry-driven research and technical assistance initiative which addresses critical technology needs facing the apparel, carpet, and textile industries. CCACTI funds faculty and staff from seven universities in Georgia to work with these industries on their most pressing situation is developing in commercial carpet where three major firms could eventually control the market, with smaller survivors supplying custom, special, and low-volume products. Consolidation will also impact the retail side and the fiber production side. Beaulieu is a prime example: it is the most vertically integrated carpet and rug manufacturer in the US owning its own nylon manufacturing facility.

As a general rule, textile companies perceive mergers and acquisitions as an effective way to enhance capabilities in today’s competitive global markets and the trend is clearly reflected in Georgia. On the whole, the US textile industry has stabilized and downsized and is responding proactively to international competition. The Southeast region is leading the way in this adjustment.

LIST OF INDIVIDUALS INTERVIEWED FOR THIS OVERVIEW STUDY

• David Link, Chief Economist, American Textile Manufacturers Institute, Washington, D.C.

• Craig Camuso, Georgia Textile Manufacturers Association, Atlanta, Georgia

• Dr. Fred Cook, Director, School of Textile Engineering, Georgia Tech, Atlanta, Georgia
Table 1, Textile and Apparel Employment in Georgia (1984-1996 *)

<table>
<thead>
<tr>
<th>Year</th>
<th>Textile Employment</th>
<th>Apparel Employment</th>
<th>Total Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1996</td>
<td>110,500</td>
<td>43,900</td>
<td>154,400</td>
</tr>
<tr>
<td>1995</td>
<td>111,745</td>
<td>50,460</td>
<td>162,205</td>
</tr>
<tr>
<td>1994</td>
<td>112,000</td>
<td>55,100</td>
<td>167,100</td>
</tr>
<tr>
<td>1993</td>
<td>108,700</td>
<td>57,200</td>
<td>165,900</td>
</tr>
<tr>
<td>1992</td>
<td>106,700</td>
<td>59,700</td>
<td>166,400</td>
</tr>
<tr>
<td>1991</td>
<td>105,100</td>
<td>58,200</td>
<td>163,300</td>
</tr>
<tr>
<td>1990</td>
<td>110,500</td>
<td>61,400</td>
<td>171,900</td>
</tr>
<tr>
<td>1989</td>
<td>110,900</td>
<td>64,400</td>
<td>175,300</td>
</tr>
<tr>
<td>1988</td>
<td>109,700</td>
<td>67,100</td>
<td>176,800</td>
</tr>
<tr>
<td>1987</td>
<td>107,300</td>
<td>68,500</td>
<td>175,800</td>
</tr>
<tr>
<td>1986</td>
<td>102,900</td>
<td>69,000</td>
<td>171,900</td>
</tr>
<tr>
<td>1985</td>
<td>100,800</td>
<td>70,400</td>
<td>171,200</td>
</tr>
<tr>
<td>1984</td>
<td>104,900</td>
<td>75,100</td>
<td>180,000</td>
</tr>
</tbody>
</table>

* Annualized Average Employment, except for 1996 which is the monthly December figure.

Table 2, Overall Georgia Export to Mexico (1994 - 1996)

<table>
<thead>
<tr>
<th>SIC</th>
<th>Textile (22)</th>
<th>Apparel (23)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1994 (000)</td>
<td>31,876</td>
<td>22,744</td>
</tr>
</tbody>
</table>
Georgia / Export 1995 (000) 34,205 40,463
1996 (000) 57,782 66,616
% Change 68.92 64.63
1994 (000) 827,808 1,473,631
U.S. / Export 1995 (000) 854,195 1,604,704
1996 (000) 787,664 1,474,119
% Change -7.78 -8.13
1994 3.85 1.543
Georgia / U.S. 1995 4.004 2.521
1996 7.335 4.519

Table 3, Overall Georgia Export to Canada (1994 - 1996)

<table>
<thead>
<tr>
<th>SIC</th>
<th>Textile (22)</th>
<th>Apparel (23)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1994 (000)</td>
<td>247,633</td>
<td>26,380</td>
</tr>
<tr>
<td>Georgia</td>
<td>1995 (000)</td>
<td>237,544</td>
</tr>
<tr>
<td>Export</td>
<td>1996 (000)</td>
<td>268,396</td>
</tr>
<tr>
<td>% Change</td>
<td>12.98</td>
<td>5.25</td>
</tr>
<tr>
<td>1994 (000)</td>
<td>1,444,914</td>
<td>805,355</td>
</tr>
<tr>
<td>U.S.</td>
<td>1995 (000)</td>
<td>1,607,078</td>
</tr>
<tr>
<td>Export</td>
<td>1996 (000)</td>
<td>1,344,406</td>
</tr>
<tr>
<td>% Change</td>
<td>-16.34</td>
<td>-20.58</td>
</tr>
<tr>
<td>1994</td>
<td>17.138</td>
<td>3.523</td>
</tr>
<tr>
<td>Georgia / U.S.</td>
<td>1995</td>
<td>14.761</td>
</tr>
<tr>
<td>1996</td>
<td>19.963</td>
<td>3.65</td>
</tr>
</tbody>
</table>

Overall Georgia Exports by Industry Ranked by Value

<table>
<thead>
<tr>
<th>SIC</th>
<th>Textile (22)</th>
<th>Apparel (23)</th>
<th>Subtotal</th>
<th>Grand Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rank</td>
<td>8</td>
<td>11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1994 (thousands)</td>
<td>774,805</td>
<td>296,747</td>
<td>1,071,552</td>
<td>10,029,149</td>
</tr>
<tr>
<td>1995 (thousands)</td>
<td>749,816</td>
<td>398,709</td>
<td>1,148,525</td>
<td>12,400,490</td>
</tr>
<tr>
<td>1996 (thousands)</td>
<td>822,688</td>
<td>475,817</td>
<td>1,298,505</td>
<td>12,542,921</td>
</tr>
<tr>
<td>% change (95/96)</td>
<td>9.7</td>
<td>19</td>
<td></td>
<td></td>
</tr>
<tr>
<td>% change (94/95)</td>
<td>-3.2</td>
<td>34.30</td>
<td></td>
<td></td>
</tr>
<tr>
<td>% change (94/96)</td>
<td>6.1</td>
<td>60.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percentage of total industry</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1994 (%)</td>
<td>7.73</td>
<td>2.96</td>
<td>10.68</td>
<td></td>
</tr>
<tr>
<td>1995 (%)</td>
<td>6.05</td>
<td>3.22</td>
<td>9.26</td>
<td></td>
</tr>
<tr>
<td>1996 (%)</td>
<td>6.56</td>
<td>3.79</td>
<td>10.35</td>
<td></td>
</tr>
</tbody>
</table>

General Profile of Textile Industry in Georgia, Alabama
## and North Carolina (1994)

<table>
<thead>
<tr>
<th>State</th>
<th>Georgia</th>
<th>Alabama</th>
<th>North Carolina</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry investment (million)</td>
<td>600</td>
<td>224</td>
<td>N/A</td>
</tr>
<tr>
<td>Total payroll (million)</td>
<td>2,500</td>
<td>1,784</td>
<td>6,000</td>
</tr>
<tr>
<td>Local &amp; state taxes (million)</td>
<td>400</td>
<td>160</td>
<td>N/A</td>
</tr>
<tr>
<td>Number of employees</td>
<td>160,000</td>
<td>102,600</td>
<td>284,497</td>
</tr>
<tr>
<td>% of State manufacturing jobs</td>
<td>29</td>
<td>27</td>
<td>33</td>
</tr>
<tr>
<td>Number of plants</td>
<td>500</td>
<td>N/A</td>
<td>2,248</td>
</tr>
<tr>
<td>Number of companies</td>
<td>300</td>
<td>591</td>
<td>N/A</td>
</tr>
<tr>
<td>Jobs in textile and related products</td>
<td>169,000</td>
<td>104,433</td>
<td>284,697</td>
</tr>
<tr>
<td>Expense in electricity (million)</td>
<td>225</td>
<td>160</td>
<td>N/A</td>
</tr>
<tr>
<td>Total economic impact</td>
<td>10</td>
<td>22.911</td>
<td>N/A</td>
</tr>
<tr>
<td>% of Women and minorities employed</td>
<td>42, 34</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Industry contribution to State GDP</td>
<td>6.93</td>
<td>9.34</td>
<td>N/A</td>
</tr>
</tbody>
</table>