

Editorial

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China has a long history as a textile producer. In the late eighteenth century, in many areas of textile weaving and dyeing, Western Europeans were still working on imitating Chinese processes, and textile production was important in many urban and rural areas, especially in the Yangzi Delta, where it was strongly encouraged by the Qing dynasty.⁽¹⁾ During the nineteenth century, the disintegration of the imperial regime prevented the development of an indigenous industrial revolution and spurred the ambitions of the industrialised countries to penetrate the Chinese market with cheap textile goods. It is only after the reform policies launched in 1978 that China was able to industrialise and regain a major role in the global textile industry. Between 2000 and 2012, China's share of global textile exports increased from 18.2% to 33.4%, and its share of global garment exports increased from 18.2% to 37.8%.⁽²⁾

Today, China is the main supplier to the world's textile market. Low labour costs attracted manufacturing facilities from advanced economies, which in return experienced a process of deindustrialisation while retaining the conception of products and the control of the marketing processes within their borders. Simultaneously, China also restructured its state-owned enterprises. In the 1990s, while many factories closed down in the textile and garment industries and middle-aged workers, mostly women, were dismissed, a large number of small and medium-sized private enterprises were also created. China's textile industry today is composed of a great diversity of actors. There are large, medium, and small enterprises; some are Chinese, others are foreign-owned or joint ventures; some are state-controlled and others are private. In 2011, the output value of the textile industry accounted for 7.11% of China's GDP. On the one hand, textiles and garments make up a significant share of Chinese exports (13.22% of China's total exports in 2013⁽³⁾), while on the other hand, as a labour-intensive industry, the textile industry provides China with a lot of occupational opportunities, employing more than 10 million people and many more indirectly.⁽⁴⁾

It is not only its economic and social significance for China and the rest of the world that explains our interest in the sector; there are analytical reasons for having a fresh look at China's textile and garment industries. The first reason is their importance in the industrialisation process. The industrial revolution started with the expansion of consumption markets for textile products, mainly cotton products, which was notably made possible by the development of new means of transportation in the second half of the eighteenth century (ports and canals in the United Kingdom, royal roads in France).⁽⁵⁾ The textile industry and industrialists played a paramount role in the take-off of European economies as well as in late-industrialised countries such as Japan. The research questions we are addressing in this issue are based on their experiences. Compared to what has happened in Europe, the United States, and Japan, what are the particularities of the Chinese textile industry? In the case of the garment sector, for which mass production dates back only to the second half of the twentieth century, is China following the same pattern as Europe or Japan? Over the last three decades, the globalisation of the industry and the complex division of labour between designing, producing, marketing, and distribution have indeed completely transformed the economic environment.

The garment industry has also played a major role in social history over the last century. The garment industry has proven to be a fertile terrain for immigrant entrepreneurs. In the case of both New York and Paris, the demand for small business activities and the supply of existing and potential business owners have interacted to generate immigrant entrepreneurship. The demand for small business activities emanates from markets whose small size or susceptibility to flux and differentiation limit the potential for mass production and mass distribution. These conditions have favoured small-scale enterprises, thus lowering the entry barriers to immigrants with limited capital resources.⁽⁶⁾ In the case of China's migrant population, we assume that the garment industry is likewise a major means of social integration and a ladder for migrants' social mobility.⁽⁷⁾

Researching the Chinese garment industry today is all the more important because of a possible shift in the global industry and the changing position of Chinese industry in the global production chain.⁽⁸⁾ Since the opening of the country in the late 1970s, the new international division of labour has enabled China to become the first global manufacturer of standardised mass products. Major global distributors have been taking advantage of cheap Chinese labour. The textile and garment industries moved out of old industrialised countries to China. But as noted above, only production was transferred, whereas conception and design remained in Europe, the U.S., or Japan. Nowadays labour is cheaper in South and Southeast Asia, where large international firms are increasingly sourcing products and Chinese enterprises themselves are setting up manufacturing plants. At the same time, Chinese actors in the industry intend to seize a growing portion of added value, moving up the production chain towards design and distribution. Bosideng, for instance, founded in 1975 and the largest apparel company in the People's Republic, opened a first London store in September 2012. At another level, Shanghai, with its long history of textile and garment industries, is aiming at becoming in the near future a fashion capital as important as Paris, London, Milan, New York, and Tokyo on the global scene. In terms of innovation and creativity dynamics, is Shanghai similar to these capital cities? And what are the differences between the garment industry – for

1. Kenneth Pomeranz, *The Great Divergence*, Princeton, Princeton University Press, 2000, p. 45 and p. 87.
2. Zhongguo fangzhi gongye lianhehui (Federation of China's Textile Industry), *2013/14 Zhongguo fangzhi gongye fazhan baogao* (2013/14 China Textile Industry Development Report), Beijing, Zhongguo fangzhi chubanshe, 2014, p. 396.
3. *Ibid.*, pp. 370-371.
4. Zhongguo fuzhuang xiehui wang (China National Garment Association website), available at www.cnga.org.cn (accessed on 9 July 2015).
5. Jan de Vries, "The Industrial Revolution and the Industrious Revolution," *The Journal of Economic History*, Vol. 54, No. 2, 1994, pp. 249-270; Patrick Verley, *La Révolution industrielle*, Paris, Gallimard, 1997.
6. Roger Waldinger, *Through the Eye of the Needle: Immigrants and Enterprise in New York's Garment Trades*, New York, New York University Press, 1986; Nancy L. Green, *Ready-to-wear and Ready-to-work: A Century of Industry and Immigrants in Paris and New York*, Durham, NC, Duke University Press, 1997.
7. Gilles Guiheux, "Travailleurs migrants du prêt-à-porter en Chine. Flexibilités et opportunités" (*Migrant garment workers in China. Flexibilities and opportunities*), *Revue européenne des migrations internationales*, Vol. 28, No. 4, 2012, pp. 27-42.
8. Gary Gereffi and Miguel Korzeniewicz (eds), *Commodity Chains and Global Capitalism*, Westport, CT, Greenwood, 1994.

which China overall is the top global producer – and fashion – for which China is still an emerging power?

All contributors to this issue highlight the importance of a long term-perspective. China's garment industry and fashion have a long history and legacies from previous periods that should be taken into account. China has been characterised by vibrant engagement with the outside world long before mechanised production and consumer capitalism heralded the arrival of "modern" fashion. Twentieth-century Shanghai's fashion industry was not simply a result of new flows of technology and commerce following on the heels of Western colonialism, but was the beneficiary of the fashionable impulses of earlier times.⁹ The same could be said about present times, and our perspective should be cosmopolitan and creative. Today's garment industry can be characterised by a variety of flows or circulations: capital and technology, but also know-how and individuals who are constantly moving in and out of China. We assume that this high level of integration within global flows is a specificity of the Chinese garment industry that makes it distinctive and forces us to adopt new analytical views. We should take into account the capacity of China to foster and attract foreign talent and capital, and at the same time try to understand its apparent lack of creativity.

All the papers in this issue will also show that production and consumption should be studied together, as two parts of a system. Production should not be studied without taking into consideration markets, distribution, and consumer demand. Whereas most publications focus on one aspect of the industry – this is notably the case for historical research – several papers in this issue look at the network of players involved in the industry: producers, distributors, consumers, and state actors, but also the media or the designers. This innovative analytical perspective explains why papers collected in this issue deal with the various production processes involved between raw materials (cotton, synthetic fibres, etc.) and final products: the textile industry – spinning and weaving, which tends to be concentrated in larger factories – and the garment industry, which involves cutting and sewing. In terms of methodology and data, all papers rely on first-hand material collected either in archives or through interviews and ethnological field work. They adopt a case study perspective, looking at localised situations: either an enterprise, a group of enterprises, a locality, or a group of consumers.

China's garment industry is a globalised industry, as will be shown from various perspectives. China is producing for the global market, including for the global poor. Producing for the global market doesn't necessarily mean mass production within Fordist-type factories; small family-owned workshops are also producing for the global market (Gao and Kuah-Pearce; Shi). Foreign actors have long played a key role in Chinese fashion (Brasó-Broggi; Ichikawa). China's garment industry is a globalised scene where information, capital, technologies, individuals, and norms circulate. These global inputs are not only "assembled" in China, as the production process in China is more than copying global trends; we will assess what value is created.

At the same time, China's garment industry is strongly embedded in local configurations at various scales, districts, cities, or provinces. The garment industry will be viewed as a network of players. Several papers will underline the variety of local actors who are playing a key role in the industry: local states, associations of producers, distributors, wholesalers, traders, and designers (Brasó-Broggi; Ichikawa; Shi). Fashion itself is highly localised and is not the same from one city to another (Ichikawa). In this "glocal" environment, we will try to identify the space for creation and innovation.

The issue starts with a contribution on the Shanghai fashion industry during the late Qing and the Republican era. Looking at Shanghai's first moder-

nity, Brasó-Broggi shows that the rise of the modern fashion industry was determined by a complex economic network of businesses and entrepreneurs. During the First World War, the traders who were until then only importing foreign cloth and introducing new styles of clothing turned to industrial entrepreneurship; they built textile integrated factories that could produce new goods on a massive scale. It was a cosmopolitan network but also a local one, where the community of Ningbo merchants played a dominant role. Brasó-Broggi explains how trade networks participated in the industrial and consumption booms that took place in Shanghai and the Yangzi Delta during the 1920s and 1930s. The strong ties that existed between producers, traders, and retailers allowed the city of Shanghai to constantly innovate and adapt new technologies to local consumer tastes.

The next paper looks at another key centre of the China textile and garment industry since the reforms, the city of Shaoxing in Zhejiang Province. From a socio-historical perspective, Shi discusses the changes in the industry over the last 30 years. She highlights the importance of the local configuration, notably the ties between the enterprises, the markets, and the local state. She also sheds light on the difficulties of enterprises in adjusting to a continuously changing environment, especially when it comes to the opportunities offered by the domestic and international markets and new regulations.

Gao and Kuah-Pearce also focus on the conditions of production but in the Guangzhou area. Looking at non-mass production, they stress the role of business operators' relational work in the formation and functioning of the garment industry. Adopting a microsociological perspective, they explore the social and human factors that influence economic transactions. In their case study, most stall-keepers and factory owners are interconnected by pre-existing friendships or family relations before they enter the business. This indicates that there is no sharp divide between social networking and business networking.

The final paper goes back to the Shanghai fashion industry but focuses on its latest developments. Since the 1990s, Chinese entrepreneurs in the textile and apparel industry have been confronted with increasing pressure stemming from foreign entrants and changing local demand. To face multiples challenges, they are transforming their enterprises into creativity-driven organisations. Chrétien-Ichikawa shows how Shanghai is evolving from a clothing industry capital to a fashion system. Can this high-added-value niche be a model for the rest of the textile sector? What is the future of the sector as South and Southeast Asia become more attractive in terms of production costs? The question of innovation is one that looms large for the whole Chinese economy.

Beyond the various periods, regions, and sections of the commodity chain considered, all papers argue that the garment industry should be approached as a system with a plurality of actors intensively connected to the outside world. Nowadays, more than ever, the dynamics of the Chinese case are shaping the entire global fashion and garment industry and need to be explained.

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9. Antonia Finnane, *Changing Clothes in China: Fashion, History, Nation*, London, Hurst, 2008.