

意大利如何在古丝绸之路上再铸辉煌

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摘要: 古“丝绸之路”使中国的丝绸取代了地中海地区的丝绸,现如今,同样的“丝绸之路”仍旧以不同的形式存在着,意大利目前仍从中国购买几乎所有的丝绸原材料。外贸对于意大利丝绸业依旧是最重要的,出口以丝织物为主,意大利丝绸产品2016年的出口总值达到8.73亿欧元,较2015年略有增长,但由于价格压力和激烈的竞争,丝绸用量显著减少。不仅仅是意大利,当今世界的丝绸行业正承受着缺乏明确制度性战略的痛苦,针对生态可持续性、公平贸易和质量改善三方面制订丝绸战略迫在眉睫。随着经济走势继续加快,一些精准的政策也需出台,以保护丝绸本身和丝绸经营者。

关键词: 意大利; 丝绸之路; 制度战略; 可持续发展; 贸易; 质量

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How does Italy regain brilliant achievements on the ancient Silk Road

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Abstract: The ancient “Silk Road” made Chinese silk replace the silk in Mediterranean region. Nowadays, the “Silk Road” still exists in different forms. At present, Italy still purchases almost all raw materials of silk from China. Foreign trade is most important for the Italian silk industry, and the main export product is silk fabrics. The gross export value of Italian silk products reached 873 million Euros in 2016, showing slight increase from 2015, but the amount of silk used was significantly reduced due to price pressure and fierce competition. Except Italy, the silk industry in the world is suffering from a lack of a clear institutional strategy. It is imperative to formulate a silk strategy in three aspects: eco-sustainability, fair trade and quality improvement. As the economic trend continues to accelerate, some precise policies need to be introduced to protect silk itself and silk operators.

Key words: Italy; Silk Road; institutional strategy; eco-sustainability development; trade; quality

Over the past the millenniums, the Silk Road has generated the widest exchange of goods and contacts in both ways between Asia and Europe. Through it, silk came from China, replacing Mediterranean silk, and slowly this yarn introduced modern industry in the West^[1-3]. In recent times the same “Road” which still exists in various forms, has been brought into the East machinery and discoveries, exchanging them in ancient times among peoples living from one extreme to the other of

the two continents^[4-5].

1 欧洲古代丝绸的起源和发展

1 The origin and development of ancient silk in Europe

1.1 蚕丝的历史起源和传播

1.1 The historical origin and dissemination of Silk

There are about 300 species of known insects producing different cocoons. Their use appeared at least 5-7 thousand years ago. On the shores of the Mediterranean, cocoons of insects were used, soaked in hot water and pulled at various points to extract threads. Greek

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papers dated more than 3,000 years ago describe the excellent quality of the fabrics obtained. The same technique was common throughout Asia.

But in China it is noted that the cocoon thread, in some species of insects, was a single, continuous and very long thread. The most suitable species is the one now called *Theophila mandarin*. Since it was very unhandy to pick up cocoons from the mulberry branches, they tried to produce more cocoons, giving the insect leaves removed from the plant. The production selection for that insect lasted for more than a thousand years. The result was the *Bombyx mori*! For two or three thousand years, China guarded it suspiciously.

While in the West they used wild silk, the army of Rome suffered a very heavy defeat in the battle against the Persians at the border between Turkey and Syria on 9 June 53. On that occasion, the Romans discovered that the enemies had banners, dresses, and other accessories made of a kind of unknown silk. It was the type of silk made by Chinese people and never seen before in the Mediterranean area. After the war, through the Greeks, an exchange of products soon began between Romans and Persians including especially the most coveted silk. This was paid by the Roman aristocracy at very high prices.

From the time of Rome to the Byzantine Empire, silk trade was very prosperous for six centuries. But how was silk produced in China? It was a mystery and in the West there were many hypotheses about the origin of that thread. Only around 550 the exact origin of that Eastern silk became known. Two Christian monks, through the Silk Road, brought silkworm eggs from China to Byzantium which were transported in bamboo canes. They also taught the essential technique of cocoon reeling. Within a couple of centuries, the breeding of silkworm, together with the reeling process, spread from Byzantium to the Middle East. The Silk Road brought basic machines and techniques for textile production from Central Asia to the Middle East: the simple spinning wheel for wool, silk waste, cotton and other fibers; the high horizontal weaving loom; the circular silk yarn twisting machine.

1.2 欧洲古代丝绸的发展

1.2 Ancient silk development in Europe

In the period between the ninth and tenth centuries, the silkworm had already reached all Mediterranean countries.

The ancient habit of the Mediterranean silk made of wild silkworms disappeared completely. The wars triggered by the Crusades against the Muslims and Byzantium made the above mentioned textile machines and techniques which were already in use in the Middle East, to reach Europe. The spinning wheel and the loom spread rapidly and widely all over Europe. Such techniques and the circular silk yarn twisting machine, starting from the thirteenth century, became the reference for silk manufacturing and for the production of all kinds of fabrics.

Especially in Italy and in the south of Europe, silk production over three centuries generated factories with hundreds of workers. Later that kind of industrial organization was applied to other productive sectors with excellent results. From the eighteenth century to the middle of the nineteenth century, silk activity was the largest industry in the Western countries. It generated, among other things, a large qualitative leap into mechanics by inventing more productive twisting machines and textile looms. Such positive development extended to other textile fibers such as wool and cotton. In the nineteenth century, the reeling also became increasingly mechanized.

In the mid-1800s, a heavy crisis exploded due to the illness of the “*pébrine*”, which affected silkworms. Within a few years, it destroyed 90% of cocoons in the West. The rescue came once again from the Orient with supplies of cocoons and, especially, of healthy seed bugs (eggs).

This situation led to a reopening of productive relationships between Europe and the main Eastern countries. Even in these days we buy almost all silk materials from China and the attendance today of a good group of silk people from Italy is the consequence of the importance of the relationship with China nowadays.

2 意大利的丝绸业发展状况

2 Development situation of silk industry in Italy

Some information regarding the development situation of silk industry in Italy is shared, and some points shall be introduced which could help our fiber to perform better, not only in Italy, but all over the world, because silk plays a great role in a very international scenario.

It has been declared several times that in the past, foreign trade was important for Italian silk industry, and 75% of turnover was made abroad. In 2016 the value of Italian exports of silk products reached 873 million Euros, which means 2% more than that in 2015. The main market was France, more than 143 million Euros, especially for luxury products. United States, Middle East and Germany were quite stable; Switzerland reduced its value; United Kingdom improved it a little bit. China jumped from 52 to almost 64 million Euros, showing a very good increase, which was mainly due to the strong development of sales of made-ups.

The exports mainly involve silk fabrics. In 2016, it was 209 million Euros, decreasing 8%. Silk dresses jumped to almost 192 million Euros, up 25%. Silk shirts and blouses amounted to almost 152 million Euros, up 6%. Silk ties decreased to 144 million Euros, down 6%. Silk scarves were almost 128 million Euros, showing a slight increase. Generally speaking, if we look at values it seems Italian silk industry is running well.

But if we consider quantities, the year 2016 recorded important losses. Italian garment makers have been able to increase their sales of very expensive silk made-ups all over the world, but silk consumption in the textile chain is suffering.

In 2016, consumption of silk yarns in weaving in Italy decreased by 11%. Production of Italian fabrics (comprising Italian finishing of foreign loomstate or boiled off) declined 6%. In recent years, a substantial reduction in silk mill consumption has been recorded especially for ties—a product which is suffering a continuous decline. But even in garments making, we see increasing shift from silk to other continuous filament fibers.

This is happening not only because of price pressure, as

it already happened in the past, but also because of innovation and good marketing of fibers similar to silk. Fashion, to some extent, is abandoning silk and it is more and more approaching other fibers.

3 意大利丝绸业发展战略

3 Development strategy of Italian silk industry

We believe there is an important job that must be done in order to support silk in a textile market which is affected by an increasing competition among fibers.

3.1 丝绸的可持续性发展

3.1 Eco-sustainability development of silk

The first key point that in our opinion deserves to be carefully considered is environmental sustainability. Last year and two years ago we already introduced the fact that the respect of the environment is a dogma today, for the consumers. Therefore it has a tremendous impact on the marketing approach of the brand names. They have promoted Zero Discharge of Hazardous Chemicals. Greenpeace supports Detox program. Global Organic Textile Standard claims to define itself what may be considered biological, apart from the real facts. There are several attempts to give measures to the green behavior of the textile chain. They invite us to become greener and greener and we are making very important efforts to provide this service for our customers.

We know silk is the queen of fibers. We know also that it is a natural fiber, which is obvious! But it is not obvious that worldwide information about silk is widespread among final consumers. Especially young people are not commonly aware of the properties of silk, at least in western countries. In some cases, they do not even know what silk is!

If you search the web, it will be not easy to find effective information about silk. We must promote serious communication about the green properties of the silk. It is necessary to develop web platforms giving clear and correct information about silk. We must give evidence to the properties that have made silk a winning fiber for a long time. Today young people venture to ignore it. Communication of silk as eco-friendly fiber would pro-

mote silk consumption and it would make young people closer to the fiber.

But there is another aspect that needs to be emphasized. The interest in eco-sustainability is strong. Consumers want to be informed and to form their opinion about it. The weak communication about silk gives the way to dangerous misinformation of it. In some books which recently were published in Europe, the environmental behavior of several fibers was described. Man-made fibers were quoted as the most ecological fiber. Silk, which is natural, was considered less ecological than chemicals. In these books the reference to silk and the knowledge of its features was extremely poor. The prejudice against silk is substantial, because books and articles make opinion among consumers. You can imagine the damage done to silk by poor information that buyers, fashion trendsetters and brand officials may receive. And it is more than a matter of good communication about silk, which is lacking. It is also a matter of good arguments, which must be developed and properly promoted. In 2016, Mr. Joao Berdu gave his speech in Hangzhou which described that sericulture helps mitigate carbon footprint.

This is a good argument and we should exploit it as silk community. It is just an example. It is an important job for Technical Innovation Professional Committee to promote studies and to define proper strategies for supporting silk as an ecological fiber. That is exactly what silk really is.

3.2 丝绸的公平贸易发展

3.2 Fair trade development of silk

The second key point is fair trade. Italy buys all silk materials from China and 75% of sales of Italian silk products are made abroad. International attitude is fundamental not only for Italian silk industry. Each single country using silk depends on Chinese supplies and even China is export-oriented. There is no fiber as much international as silk and to have easy trade flows should be profitable for each attendant of the silk game. On the contrary, we still see some barriers which should be removed. In some countries, it is evident that unacceptable duties are levied on silk products in a way,

which is preventing any business development for foreign supplies. In Europe, we are promoting the reform of preferential rules of origin for trade flows inside the so called Pan Euro Mediterranean area. This is a matter that is substantially affecting the consumption of extra EU silk twisted yarns and spun silk yarns and we are trying to obtain a favorable solution.

In China, the situation is much better than that 15 years ago, but there is still something that must be done. Chinese authorities have introduced G. B. Standard and its requirements. When Chinese silk producers sell their materials or their make-ups to Europe, they must check the goods before shipping. This is obvious and it is the same for us. Even European exporters cannot avoid tests at home, in order to check the compliance, before shipping the goods. But when the goods enter China, they may be tested again and Chinese authorities do not recognize European tests.

In Europe, as well as in China, we have reliable laboratories which are accredited internationally under very strict and purely technical rules. We can understand the willingness of Chinese policy makers to control the features of the good that China is importing. On the contrary, we cannot understand why we have to submit our goods for testing twice, in Europe and in China. It is just a tax without any real significance. Protectionism in the long term is counterproductive also for its supporters, because it prevents the modernization and the adaptation to international patterns. I think it is our common interest to remove illogical barriers to trade and to improve trade conditions.

3.3 丝绸的品质发展

3.3 Quality development of silk

The last point is quality. Quality is requested by European high-end garment companies which are setting the bar higher and higher. It is a milestone for keeping silk in the luxury market, but it is fundamental also for each market segment. Without quality, there is no future for silk! Quality is not obvious and each step of the textile chain must keep its engagement with the common goal of providing the market with reliable products.

In this perspective, electronic testing may be a useful

support, if wisely exploited. Many companies are interested in promoting the application of the electronic testing for controlling the quality of raw silk. We are aware of the efforts Chinese silk players are going to promote, with the aim of introducing electronic tests among reeling mills. We believe it is fundamental to pursue more effective information on the feature of silk materials. We encourage Chinese silk community to reinforce the implementation of electronic testing.

4 结 语

4 Conclusion

China is the birthplace of silk and even today it is by far the dominant country in the world. But China is the leading country for silk and it is mainly up to Chinese players to promote concrete steps which may help silk to shine as the queen of fibers even in the future.

We repeat again the importance and the need of strengthening the cooperation among silk players at an international level. On the contrary, we believe that

nowadays silk is suffering the lack of clear institutional strategies. We need silk strategies for eco-sustainability, fair trade and quality improvement. Today, economic trends are faster and faster and need to be tackled with timely and concrete measures. In our opinion, it is urgent to defend silk and silk players with some very precise policies.

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