

The transformation of the Barcelona's Trafalgar Garment District 1916-2016

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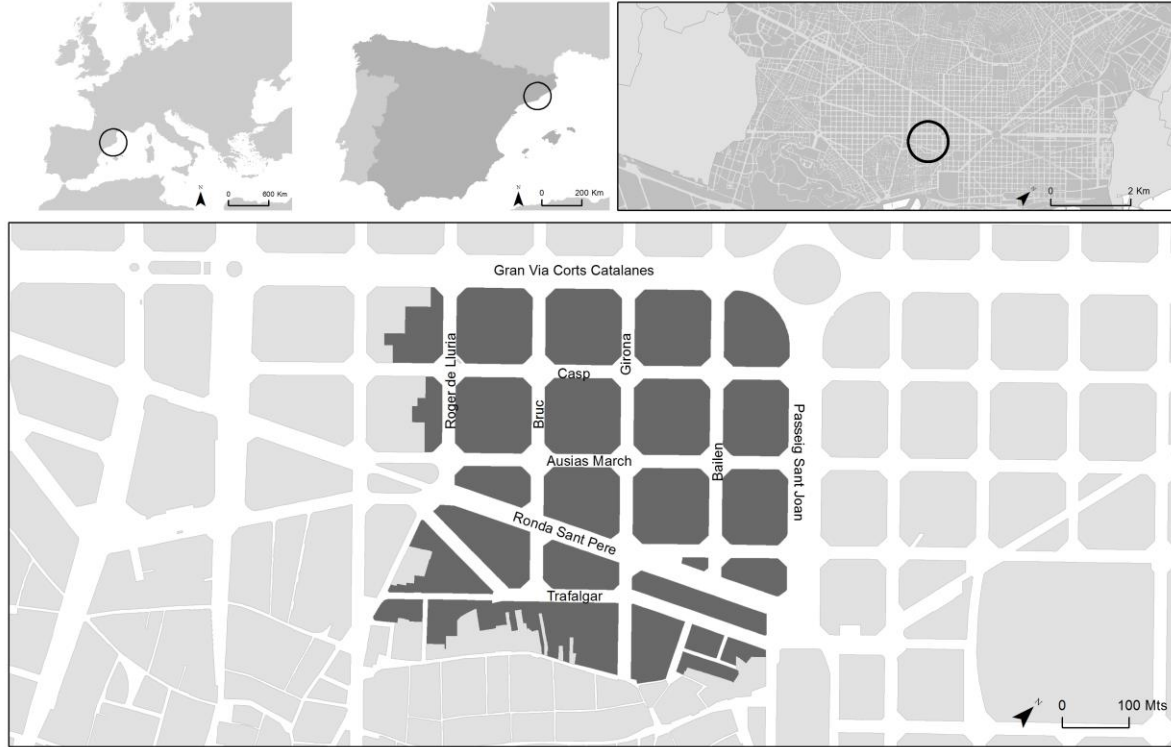
DEPARTMENT OF GEOGRAPHY

AUTONOMOUS UNIVERSITY OF BARCELONA



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Trafalgar Garment District (TGD)



Objective:

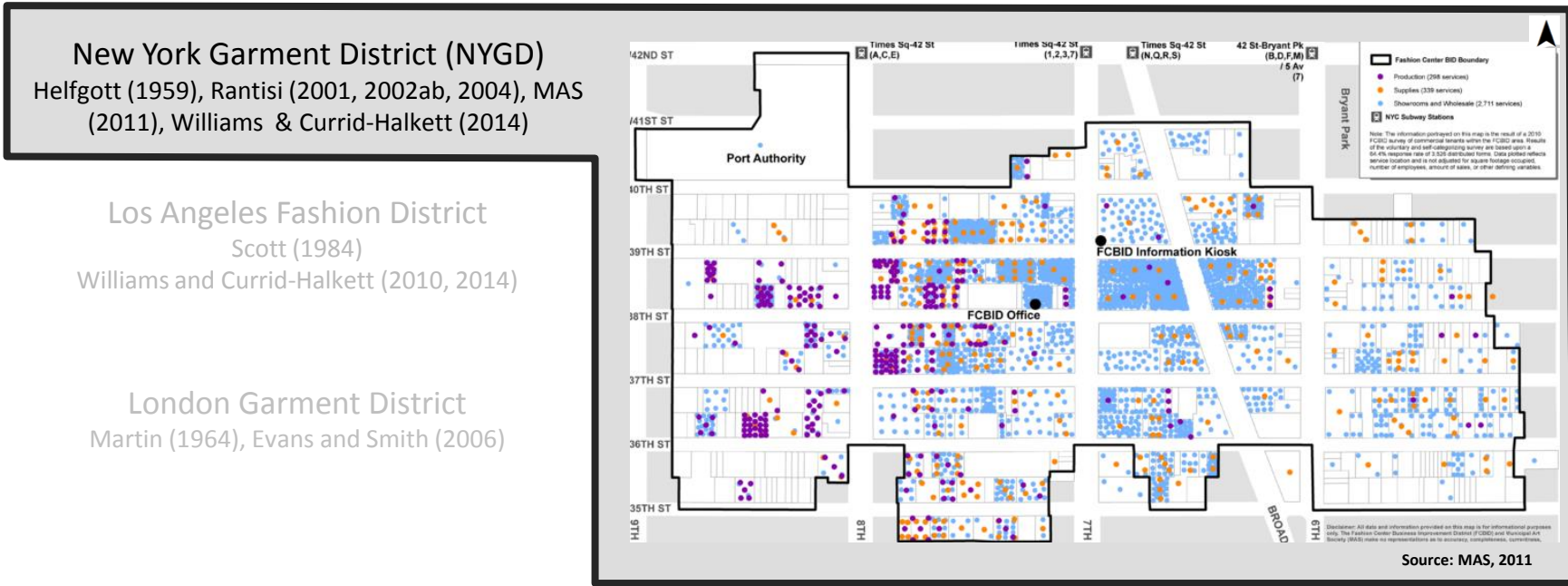
To determine and analyze the factors that are conducting the transformation of TGD garment urban cluster.

Research question:

What are the factors that have conducted to the emergence and evolution of the TGD as a garment cluster from the 20th century until today?

Garment districts: a multiapproach review (1/2)

Configuration of garment clusters in urban areas: urban agglomeration economies



Garment districts: a multiapproach review (1/2)

Configuration of garment clusters in urban areas: urban agglomeration economies

New York Garment District (NYGD)

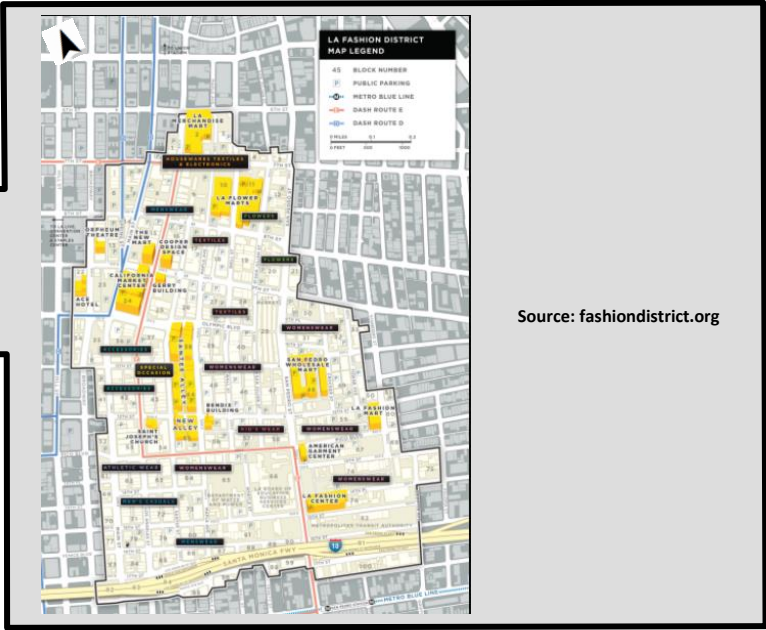
Helfgott (1959), Rantisi (2001, 2002ab, 2004), MAS (2011), Williams & Currid-Halkett (2014)

Los Angeles Fashion District

Scott (1984)
Williams and Currid-Halkett (2010, 2014)

London Garment District

Martin (1964), Evans and Smith (2006)



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Configuration of garment clusters in urban areas: urban agglomeration economies

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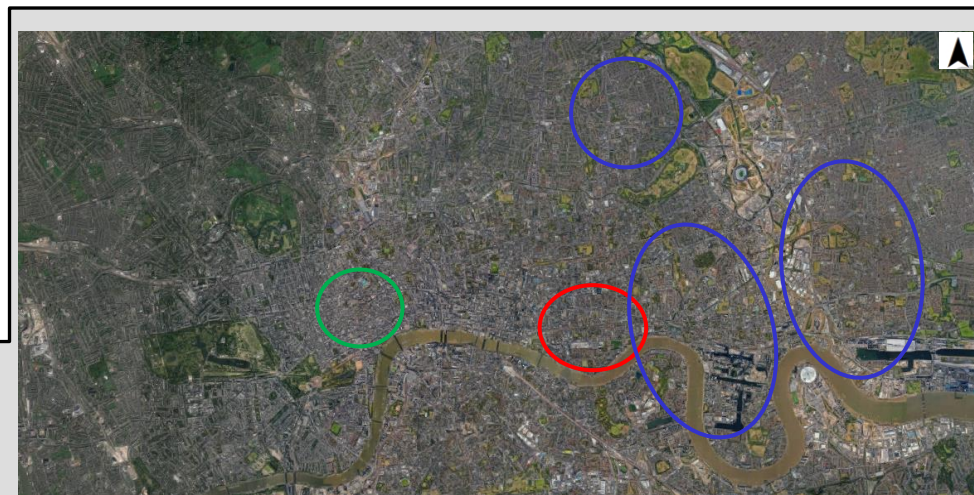
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London Garment Centers

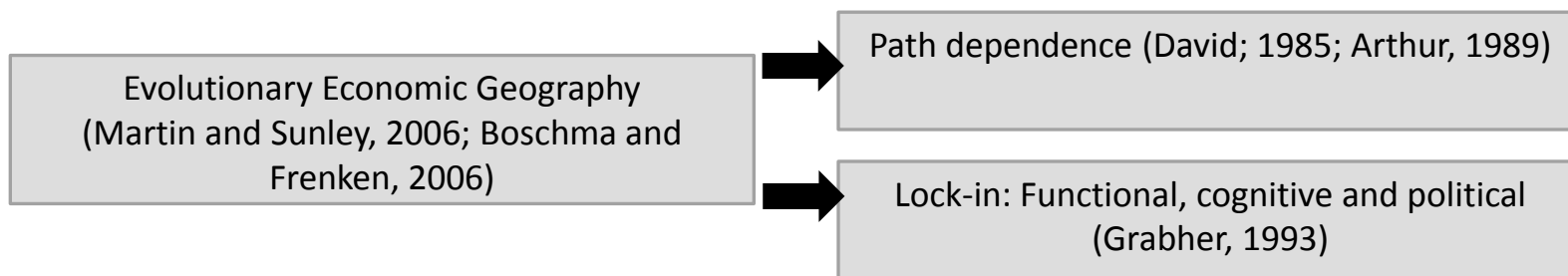
Martin (1964), Evans and Smith (2006)



Source: google maps

Garment districts: a multiapproach review (2/2)

The evolution of economic spaces: lock-in and path dependence



Evolution of economic sectors at different scales:

- At a region scale: Textile industry in Westmünsterland (Hassink, 2007) and Daegu region (Cho and Hassink, 2009).
- At an urban scale: Garment industry in New York (NYGD) (Rantisi, 2001, 2002ab, 2004).

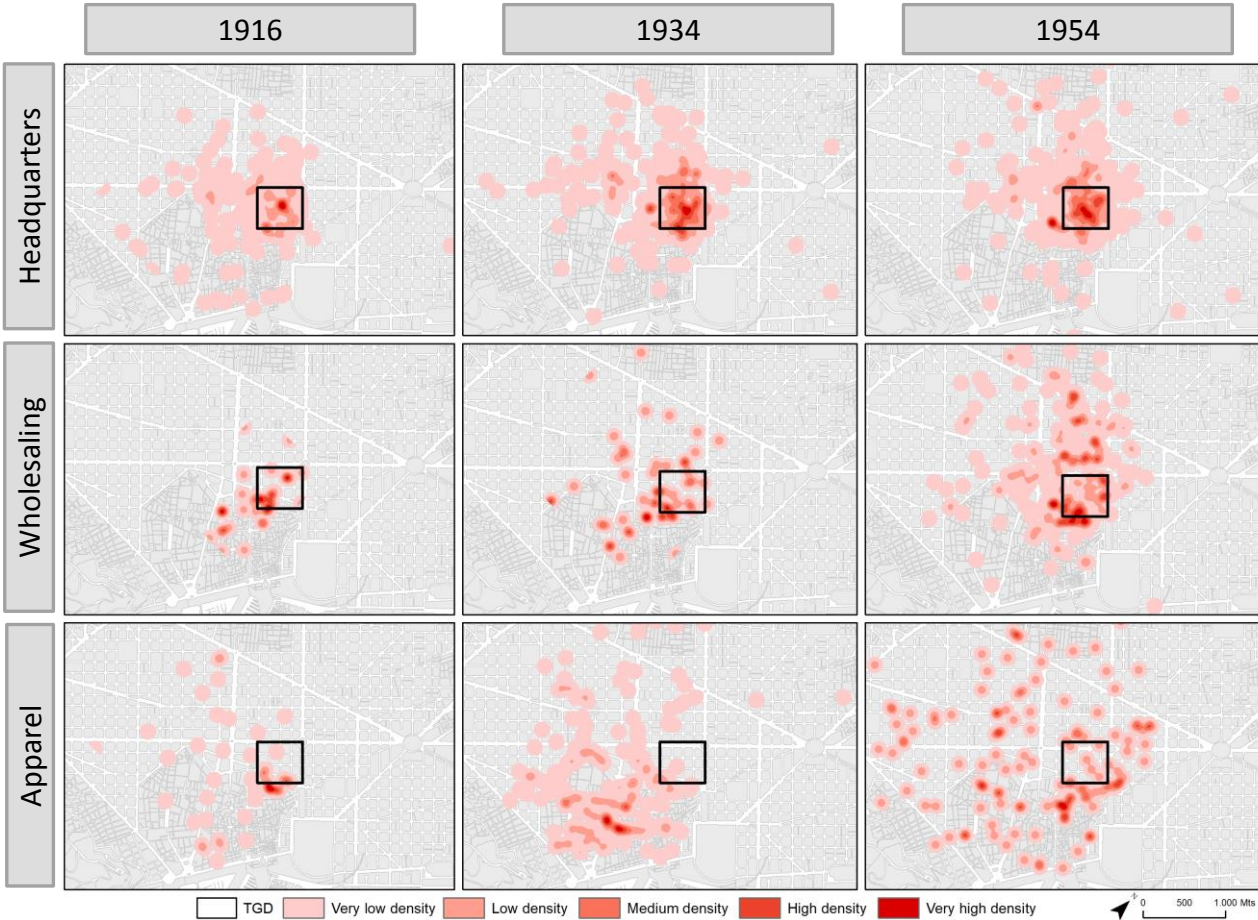
Garment districts: a multiapproach review (2/2)

The evolution of economic spaces: lock-in and path dependence

The evolution of the NYGD (Rantisi 2001, 2002ab)

How does the NYGD face external shocks and avoid lock-in processes?

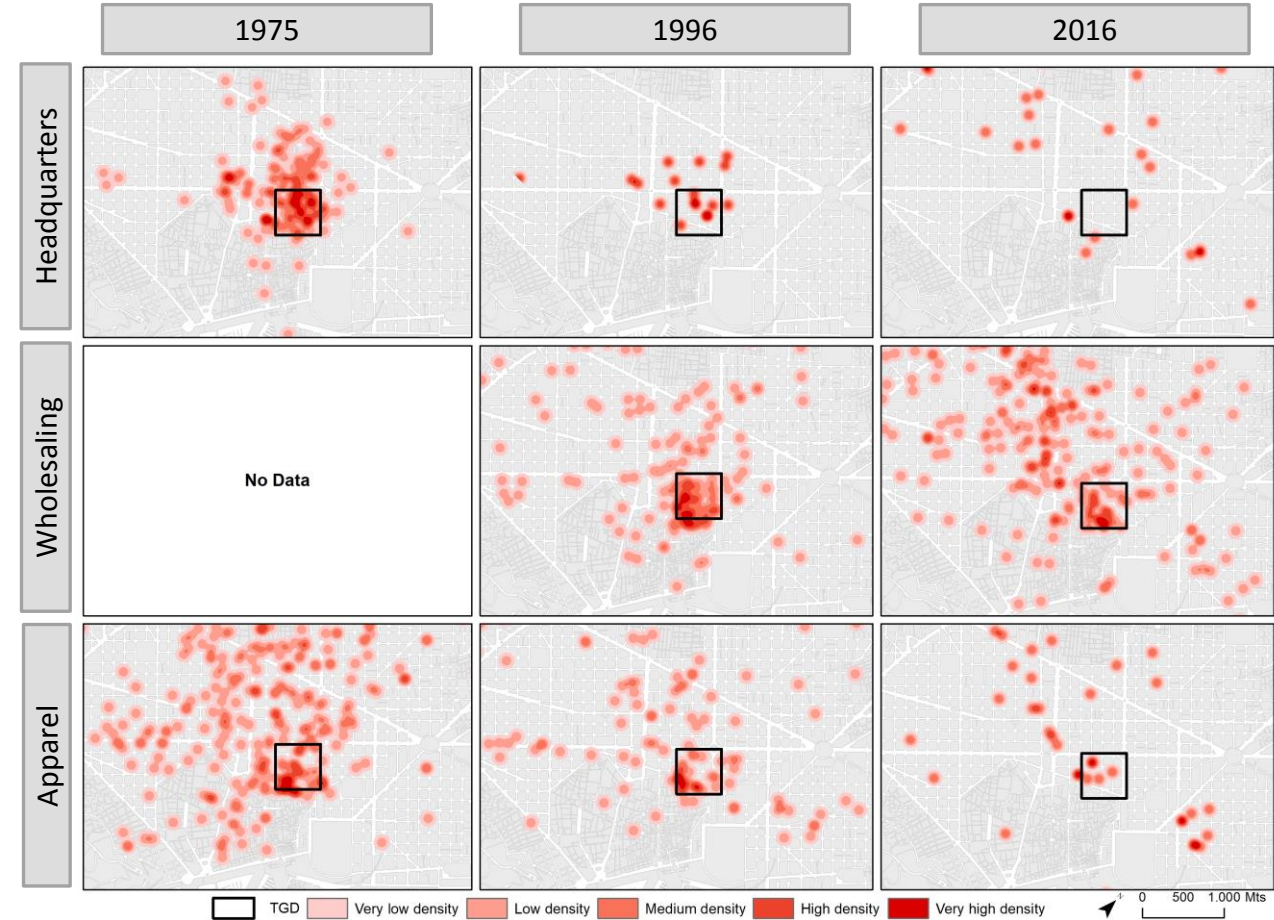




The emergence of the TGD: 1916-1954

- ❖ Transport infrastructures key in the TGD's location.
- ❖ Proximity to business services (CBD) (Collet i Vidal, 1989).
- ❖ «Industrial atmosphere». 18th – 19th centuries.
- ❖ Urbanization – Production. Influence of the industrial bourgeoisie (Massana, 1985; Espuche, 1990).

Density of garment-related firms in Barcelona and in the TGD between 1916 – 1954. Source: own elaboration

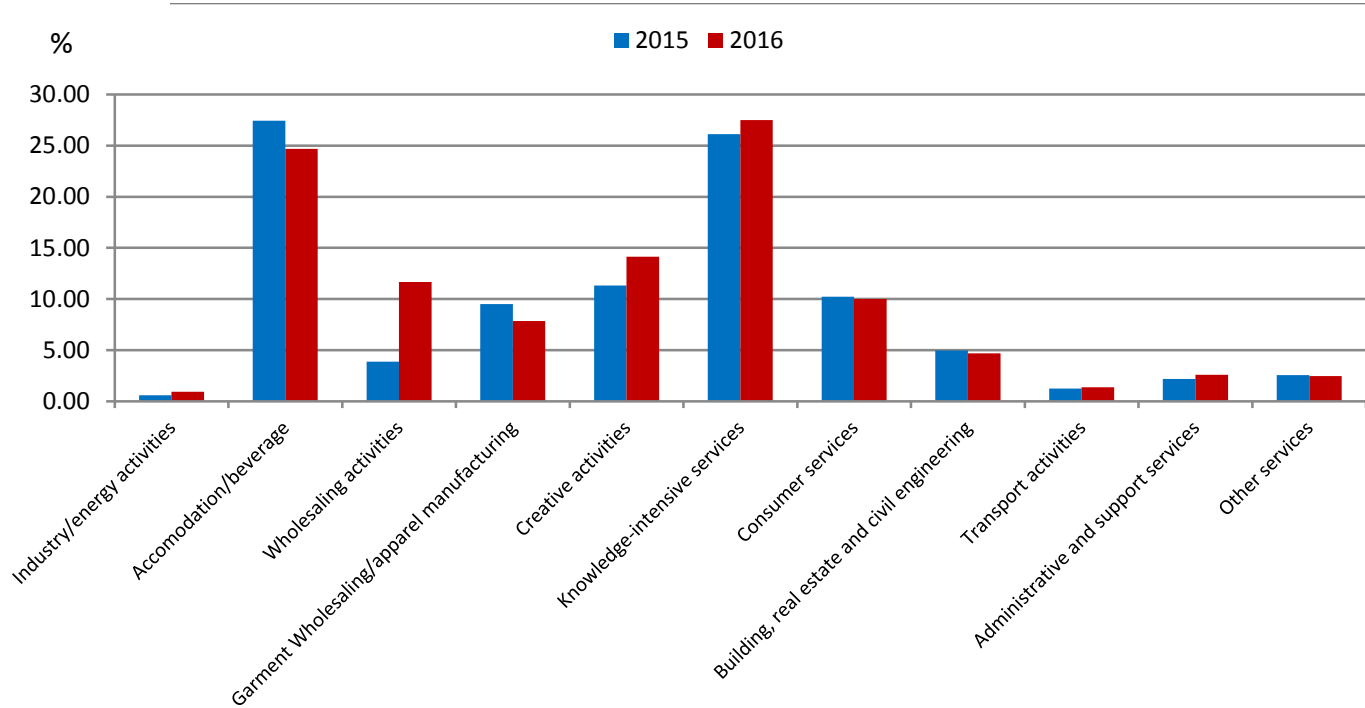


*The evolution of the TGD:
1975-2016*

- ❖ 1950s-1970s: Spanish economy strong protectionism; industry maturing.
- ❖ 1970s-1990s. Entry in the EU. Value-added shift to wholesaling and design. Apparel outsourcing to lower labor-costs countries.
- ❖ 1990s-2010s. Chinese investment in wholesaling firm in TGD. Lack of firm's renovation, a Catalanian manufacturing base and garment-related institutions. Multinationals competition.

Density of garment-related firms in Barcelona and in the TGD between 1975 – 2016. Source: own elaboration

The shape of the new Trafalgar Garment District (2016)



The shape of the new TGD: 2016

- ❖ Scarce presence of garment activities.
- ❖ The fade of the Catalanian garment industry: empty premises and office spaces devoted to garment in the TGD.
- ❖ Coworkings, knowledge-based, neoartisanal and tourism-based activities. Consumer industries (i.e. art galleries and restaurants).

Source: own elaboration

The shape of the new Trafalgar Garment District (2016)



Traditional apparel manufacturing

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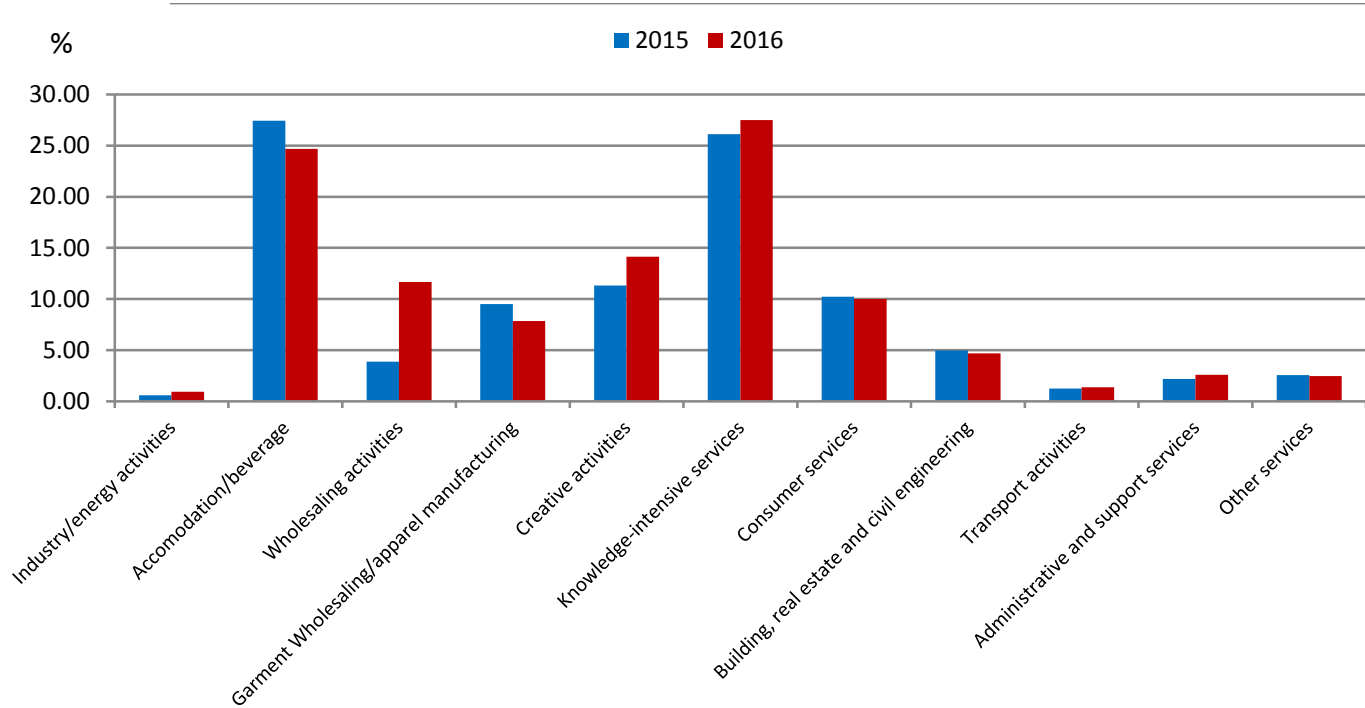
Advanced wholesaling trader: showroom

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Factors in the emergence and evolution of the TGD's garment specialization

The TGD as the garment neuralgic economic area of the Catalanian industry.

- ❖ Expansion of the *industrial atmosphere* due to an enlargement of the city. Urbanization – Industrialization.
- ❖ External economies:
 - ❖ Urbanization economies: transport infrastructures and business services (CBD). Old city.
 - ❖ Localization economies: proximity to garment-based firms.

TGD's garment cluster evolution

Functional lock-in:

- Inexistence of local manufacturing-based firms and suppliers in the TGD.
- Steadily inexistence of national and regional SME's retail purchasers due to the competition of retail multinationals.

Lost of a local garment-based network

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TGD's garment cluster evolution

Cognitive lock-in:

- SME's familiar businesses. Low budget to innovation, design and R&D.
- Not familiar continuity in wholesaling firms.
- Aim of TGD's wholesaling association (Es-Moda) did not focus on commercial issues, but on to hamper Chinese entrance in the TGD.

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TGD's garment cluster evolution

Political lock-in:

- ❖ Powerful Catalanian garment-related institutions focused on the economic situation of the textile industry but not in supporting the TGD as an urban economic space.
- ❖ Inexistence of TGD's garment institutions that encompass the whole value chain as a lobby to pressure local government.
- ❖ Insufficient landlords not subject to market prices dynamics. Absence of a TGD's protection urban zone.

Concluding remarks

- ❖ The relation between garment industry lock-ins at regional level to the garment specialization's evolution of the TGD.
- ❖ The role of the Barcelona's economic turn to knowledge-based city (22@Barcelona) and the economic transformation of the TGD.

Thank you so much for your attention and I will appreciate your questions and comments

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