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EURATEX | THE VOICE OF THE EUROPEAN TEXTILE AND APPAREL INDUSTRY

Foreword

Key figures of the Textile & Clothing industry

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The textile and fashion industry is going through turbulent times; geopolitical unrest, the energy crisis, drop in consumer confidence, the subsidy race and other state interventions create a tough economic climate for textile entrepreneurs to prosper. On top of that, the EU is moving forward with the implementation of its dedicated EU Textile Strategy. That means 16 pieces of legislation on the table, which will reshape the regulatory context for the textile and fashion industry. Much of that legislation is still under discussion at the level of EU institutions, member states and many other stakeholders who want to promote their specific perspective. But change is coming – that’s clear. In such climate of economic and regulatory uncertainty, it is critically important to communicate about the performance and tendencies within the textile industry. Therefore “facts and figures” are essential, to ensure a quality debate which is based on science and not ideology; to make sure we develop a regulatory framework which is ambitious but realistic.

As illustrated by the data presented in this publication, the European textile industry is a very wide and diverse ecosystem, designing products which are essential in so many other sectors – construction, automotive, medical, agriculture, etc. And of course, our industry stands out for its high quality garments, sold by the world’s leading fashion brands.

The bulk of our industry is small, family owned enterprises, often with decades of tradition and craftmanship. But increasingly, we notice textile start-ups, developing new sustainable products and introducing new technologies. Some of them will grow and become our new captains of the textile industry.

The purpose of this publication is to develop a broader understanding on what “textiles” is all about – nearly 200,000 companies and 1.3 million workers, committed to quality and proud of their products. EURATEX and its member associations will continue to promote and defend these companies, to ensure we maintain a competitive European textile industry.
KEY FIGURES OF THE TEXTILE & CLOTHING INDUSTRY, 2023
KEY FIGURES
2023 estimated

**TURNOVER**
170 BILLION € +2%

**INVESTMENT***
4.5 BILLION €

**COMPANIES***
197 THOUSAND

**EXPORTS**
64 BILLION € -3.8%

**IMPORTS**
115 BILLION € -17%

**EMPLOYEES**
1.3 MILLION -1.1%

Turnover and employment: estimates.
Imports and exports: extra-EU trade.
*Companies and investments in tangible assets: 2022
Source: data based on Eurostat
THE TEXTILE MANUFACTURING PROCESS

A COMPLEX VALUE CHAIN AND DIVERSITY OF PRODUCT
(VALE OF OUTPUT, % SHARE IN TOTAL T&C PRODUCTS)

1. FIBRES
   - 6%
   - Including: Natural or man-made, Staple or continuous filament

2. YARNS
   - 5%
   - Including: Spun, Filament

3. FABRICS
   - 14%
   - Including: Woven, Knitted, Or other type of fabric construction

4. FINISHED TEXTILES & CLOTHING
   - 75%

FASHION & CLOTHING (42%)
for example: underwear, shirts, suits, dresses, coats

FURNISHING & HOME (14%)
for example: curtains, upholstery, carpets, bed linen

INDUSTRIAL & TECHNICAL (19%)
for example: ropes and nettings, parachutes, medical textiles, synthetic grass, sunblinds, smart textiles

Source: EURATEX
MEMBER STATES SHARE IN TOTAL EU

ITALY IS THE LARGEST CONTRIBUTOR TO THE TEXTILE AND CLOTHING INDUSTRY IN THE EU

Unless specified, EU refers to EU27
Source: EURATEX calculations, based on EUROSTAT data
Companies in the T&C Industry

Small and micro sized enterprises are at the core of the industry.

Size of companies

- Micro: 89%
- Small: 9%
- Medium: 2%
- Large: 0.3%

99.7% of total companies in T&C industry are micro and SMEs'.

*Size by number of persons employed
- Micro: from 0 to 9
- Small: from 10 to 49
- Medium: from 50 to 249
- Large: 250 or more.

 Unless specified, EU refers to EU27
Source:
EURATEX calculations, based on EUROSTAT data
Unless specified, EU refers to EU27
Source:
EURATEX calculations, based on EUROSTAT data

**Profile**

**Turnover and Companies**

**By Sub-Sector**

![Diagram showing turnover and companies by sub-sector]

**Turnover**

- **Sectors’ share, %**
  - Clothing: 46%
  - Textile*: 54%

**€ 170 bn**

(2023e)

**Number of Companies**

- **Sectors’ share, %**
  - Clothing: 67%
  - Textile*: 33%

**197,000**

(2022)

*Textile: including man-made fibers*
“THE STRONG RECOVERY FROM COVID-19 HAS SLOWED DOWN DUE TO RISING COSTS AND LOWER DEMAND”
EMPLOYMENT AND PRODUCTIVITY PER EMPLOYEE

THE EU T&C INDUSTRY HAS ACHIEVED CONSIDERABLE GAINS IN PRODUCTIVITY PER EMPLOYEE OVER THE YEARS

EU-27 | Evolution of labour force and labour productivity in T&C industries between 2014 and 2023e

Women represent more than 70% of all employees in the sector.

Source: EURATEX calculations, based on EUROSTAT data
Profile

Employment and Skills

Ageing: An Additional Opportunity for Enterprises to Create New Jobs

Evolution of workers over 50 in T&C

Evolution of graduates (masters & bachelors), by programme orientation

Urgent need for more textile engineers!

*TCL: Textile, Clothing and Leather
Source: EURATEX calculations, based on EUROSTAT data
The sub-sector of technical textiles is one of the most dynamic, accounting for a growing share in the EU Textile production. Growing demand for technical textiles is based on applications in various industries such as healthcare, agriculture, construction, sportswear, automotive, etc.

Source: EURATEX calculations, based on EUROSTAT data
HOUSEHOLD CONSUMPTION
EU IS A KEY MARKET FOR FASHION

In 2022, households in the European Union spent €282 bn (or €630 per citizen) on clothing articles, a 15% increase compared to the previous year.

Source: EUROSTAT
Around 4 out of 10 e-shoppers in the EU had bought clothes and/or shoes online during 2023.
### TOP 15 TEXTILE & CLOTHING exporters of the world

<table>
<thead>
<tr>
<th>Country</th>
<th>Exports (Bn EUR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>314</td>
</tr>
<tr>
<td>European Union (27)</td>
<td>218</td>
</tr>
<tr>
<td>Bangladesh</td>
<td>45</td>
</tr>
<tr>
<td>Viet Nam</td>
<td>44</td>
</tr>
<tr>
<td>India</td>
<td>35</td>
</tr>
<tr>
<td>Türkiye</td>
<td>33</td>
</tr>
<tr>
<td>USA</td>
<td>20</td>
</tr>
<tr>
<td>Pakistan</td>
<td>18</td>
</tr>
<tr>
<td>Indonesia</td>
<td>13</td>
</tr>
<tr>
<td>Korea, Republic of</td>
<td>10</td>
</tr>
<tr>
<td>Hong Kong, China</td>
<td>10</td>
</tr>
<tr>
<td>Cambodia</td>
<td>9</td>
</tr>
<tr>
<td>Mexico</td>
<td>9</td>
</tr>
<tr>
<td>Chinese Taipei</td>
<td>9</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>7</td>
</tr>
</tbody>
</table>

(Data based on EU27, Source: WTO 2024, based on 2022 data)
EU TRADE

EU TRADE: IMPORTS AND EXPORTS EVOLUTION

INTERNATIONAL TRADE IS INCREASINGLY IMPORTANT; T&C IS THE 2ND MOST EXPORT INTENSIVE SECTOR OF THE EUROPEAN ECONOMY

**EU T&C trade evolution with third countries**

- EXPORTS: +37%
- IMPORTS: +40%

Source: EURATEX, based on IHS
EU TRADE FLOWS BY MAIN PARTNERS

In 2023, the top 10 EU suppliers had a 82% share in total imports from third countries, and the top 10 EU customers accounted for 66% of the total exports to third countries.

1/3 of T&C products are sold from China to the EU markets

Switzerland and UK are the EU main export markets
European clothing is the most attractive product category to customers worldwide.

* Other garments (knitted and woven): babies’ garment, T-shirts, pullovers, special garments, hosiery and clothing accessories.
SHARE OF REGIONS IN TOTAL EU EXPORTS

LEGEND:
- ACP: Africa, Caribbean and Pacific countries.
- ASEAN: Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam.
- East Asia: Japan, South Korea, Taiwan, China.
- Eastern Neighbours: Armenia, Azerbaijan, Georgia, Belarus, Moldova, Ukraine, Russia.
- EFTA & UK: Iceland, Liechtenstein, Norway, Switzerland, UK.
- MERCOSUR: Argentina, Brazil, Paraguay, Uruguay.
- NAFTA: USA, Canada, Mexico.
- Southern Neighbours: Algeria, Egypt, Israel, Jordan, Libya, Morocco, Syria, Tunisia, Palestine T., Türkiye.
- South-East Europe: Albania, Bosnia & Herzegovina, Kosovo, Macedonia, Montenegro, Serbia.

Unless specified, EU refers to EU27
Source: EURATEX, based on Eurostat
SUSTAINABILITY

CIRCULAR ECONOMY

GREEN TRANSITION PLAYS AN IMPORTANT ROLE FOR BRANDING, REPUTATION AND COMPETITIVENESS

<table>
<thead>
<tr>
<th>Technologies</th>
<th>Already using</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recycled materials</td>
<td>32,0%</td>
</tr>
<tr>
<td>Energy-saving technologies</td>
<td>27,8%</td>
</tr>
<tr>
<td>Recycling technologies</td>
<td>24,3%</td>
</tr>
<tr>
<td>Clean production</td>
<td>24,3%</td>
</tr>
<tr>
<td>Bio-based materials</td>
<td>23,3%</td>
</tr>
<tr>
<td>Renewable energies</td>
<td>18,0%</td>
</tr>
<tr>
<td>Biotechnology</td>
<td>8,3%</td>
</tr>
<tr>
<td>Additive manufacturing</td>
<td>6,8%</td>
</tr>
<tr>
<td>Carbon capture technologies</td>
<td>6,0%</td>
</tr>
<tr>
<td>Hydrogen</td>
<td>1.3%</td>
</tr>
</tbody>
</table>

32% of the textile SMEs indicated the use of recycled materials *

42% of surveyed companies adopted a green technology or adopted a new green business model*

*: Results of the EMI survey conducted with 326 textiles companies

Source: European Commission
“Monitoring the twin transition of industrial ecosystems”, DG Grow 2023
“EU-27 and Switzerland could approach a supply gap of 60 to 70% for recycled fibers by 2030”

Estimated supply and demand of recycled textile material in tons¹, 2030.

71% of consumers say they are concerned about sustainability when purchasing apparel products, but only 3% have paid a premium for more sustainable purchases.

Apparel: purchase habits of 19,000 consumers across US, Japan, Germany, France, Italy, China, India, and Brazil (% of consumers at various stages)

- Concerned about sustainability: 71%
- Adopting sustainable behaviours: 38%
- Actively purchasing sustainable products: 12%
- Paying a premium for sustainability: 3%
SUSTAINABILITY
ENERGY
FINAL CONSUMPTION IN THE TEXTILE, CLOTHING AND LEATHER INDUSTRIES (TCLF)

Natural gas is the main energy source for the industry. Green transition requires considerable innovation and investment.

Energy consumption in the TCLF* sector, by fuels

- Natural gas: 50%
- Electricity: 41%
- Heat: 4%
- Oil and petroleum products: 4%
- Solid fossil fuels: 0.4%
- Renewables and biofuels: 0.8%

*TCL: Textile, Clothing, Leather and Footwear
Source: EUROSTAT
Energy efficiency is of critical importance for the textile and clothing industry and to reduce CO2 emissions.
TEXTILE EXCHANGE

74,500+ in 97 with 34

24% Certified sites*
Countries Certifying bodies

| Sites certified in 2023 to our 8 active standards (as of February 2024) |

OEKO-TEX

33,421

30,981 1,258

13% 24%

GLOBAL RELEASED CERTIFICATES

STANDARD 100

| ECO PASSPORT |
| --- | --- |
| Δ 2023/22 (%) | Δ 2023/22 (%) |
| 17% | 23% |

OEKO-TEX® consists of 17 independent institutes in Europe and Japan, and their contact offices all over the world.

Better Cotton is the world’s leading sustainability initiative for cotton. Our mission is to help cotton communities survive and thrive, while protecting and restoring the environment. Farmers, ginners, spinners, suppliers, manufacturers, brand owners, retailers, civil society organisations, donors and governments. This adds up to more than 2,500 members in the Better Cotton network.

Source: Better Cotton 2024

Source: OEKO-TEX 2024

BETTER COTTON

2,563 11,234 2.6 Mio Tons

+6.4% +12.5% +4%

MEMBERS NON-MEMBER BETTER COTTON SOURCED

Δ 2022/21 (%) 80% 56% 2023/21 (%)
EUROPE – WORLD CAPITAL OF TEXTILE RESEARCH & INNOVATION

THE EU27 RECORDS THE HIGHEST NUMBER OF INDUSTRIAL DESIGNS’ APPLICATIONS FILED IN TCLF* SECTORS

- The 2022 and 2023 data are incomplete due to delays in patent registration.
- Both patents and utility models. The latter the prevalent form of IPR in the textile industry.
- All applications: both “granted” and only “non-granted” applications.
- The unit on which the statistics are made are the families of patents (not individual patents). Patents that make small, incremental changes to the same innovation are part of the same family.

*TCLF: Textile, clothing, leather and footwear
Source: CSIL elaboration based on Orbis IP and WIPO IP Statistics Data Center.
EUROPE – HIGH LEVEL OF EU SUPPORT FOR RESEARCH & INNOVATION ON TEXTILE SUSTAINABILITY

“The Ecosystex member projects”

Duration

Completed projects
Ongoing projects ending in 2024
Ongoing projects ending after 2024

Funding
Total budget: 167€ million

€ 148,121,879 89%
€ 18,755,475 11%

EU contribution
Co-funding

*TCLF: Textile, clothing, leather and footwear
Source: European Technology Platform