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ANNUAL REPORT 2016

EU TEXTILE & FASHION INDUSTRY: FACTS & FIGURES

€513 Bn

With household **consumption** of €513 billion, the EU-28 is the world's largest market for textile and clothing products.

€171 Bn

In 2016, the EU Textile and Clothing industry achieved **turnover** of €171 billion.

1.7 million

In the EU, EURATEX members directly or indirectly represent some 177,700 **companies** in an industry that employs 1.7 million **workers**.

No. 2

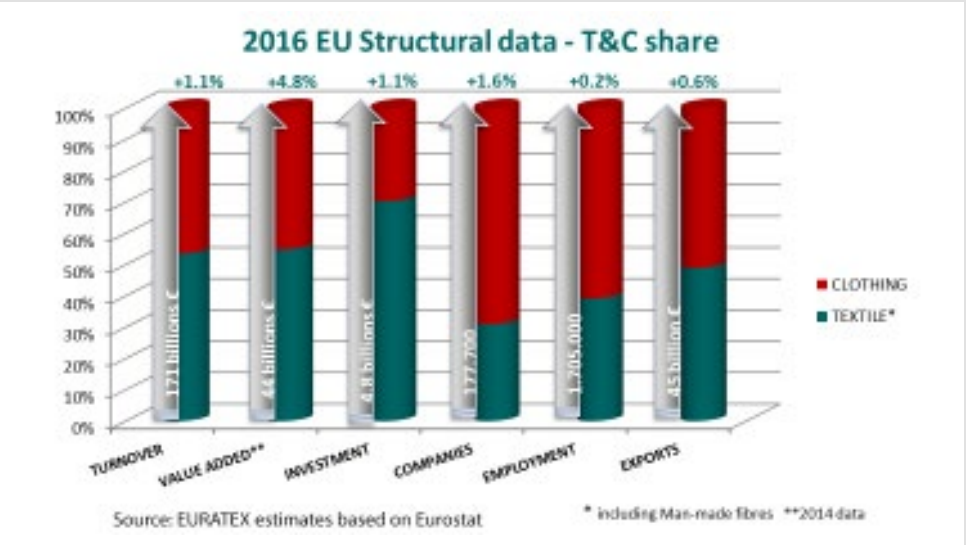
After China, the EU is the **world's second biggest exporter** of textiles and clothing with 22% and 25% of world sales respectively.

75%

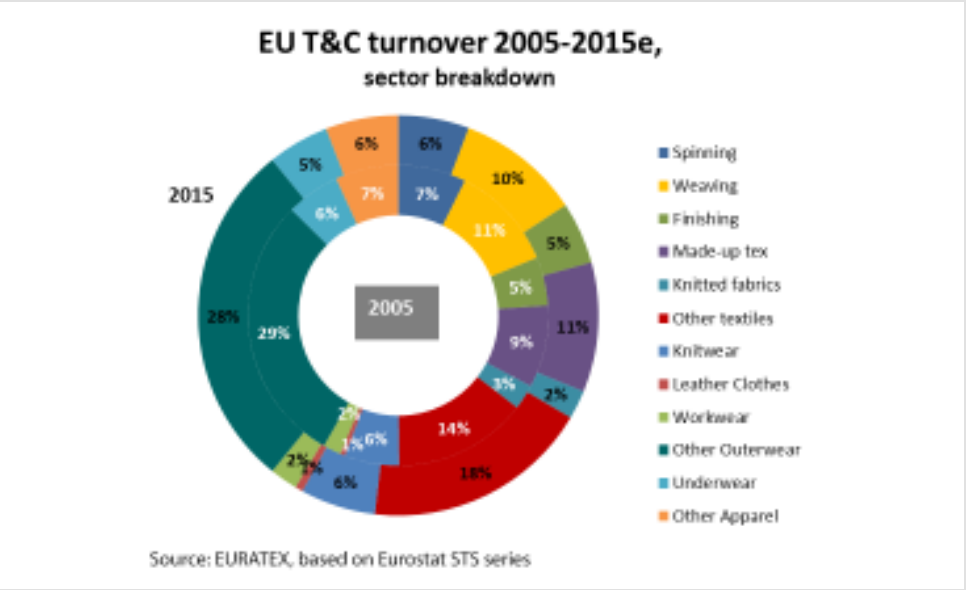
World clothing consumption represents 75% of total T&C consumption (estimates).

70%

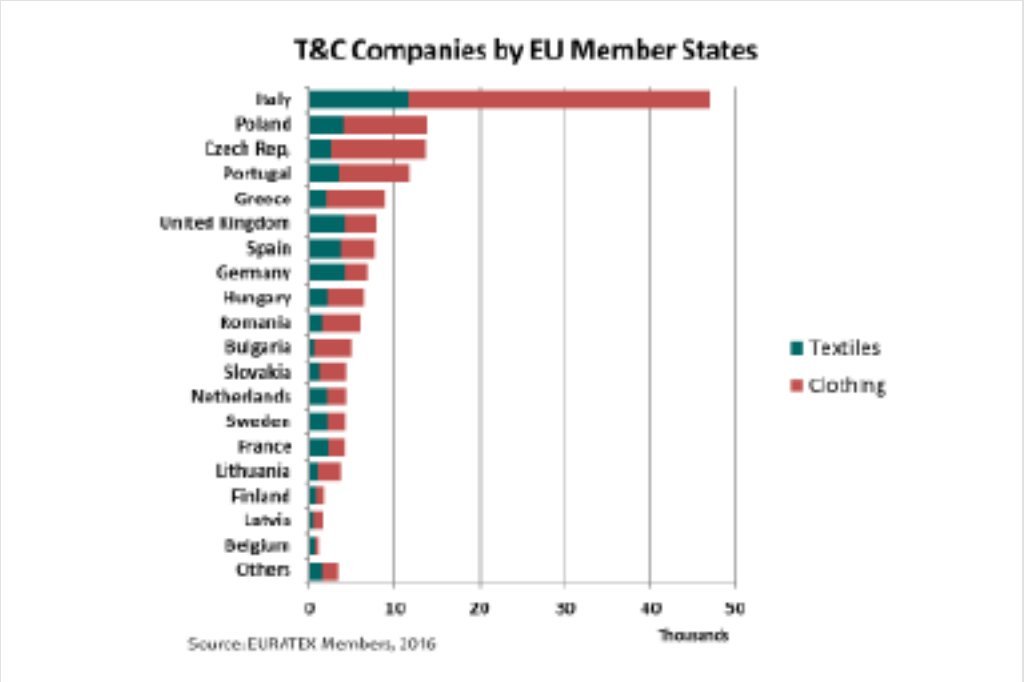
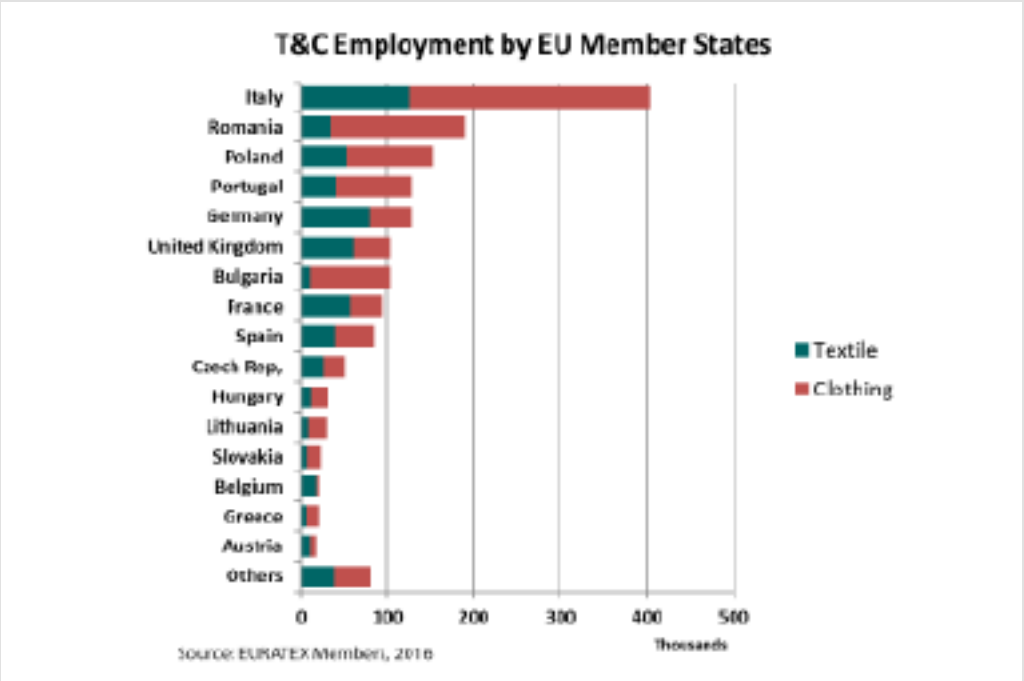
Average company size is relatively small, which explains why they principally trade within the internal market, and **intra-EU exports** represent 70% of EU trade to the world.



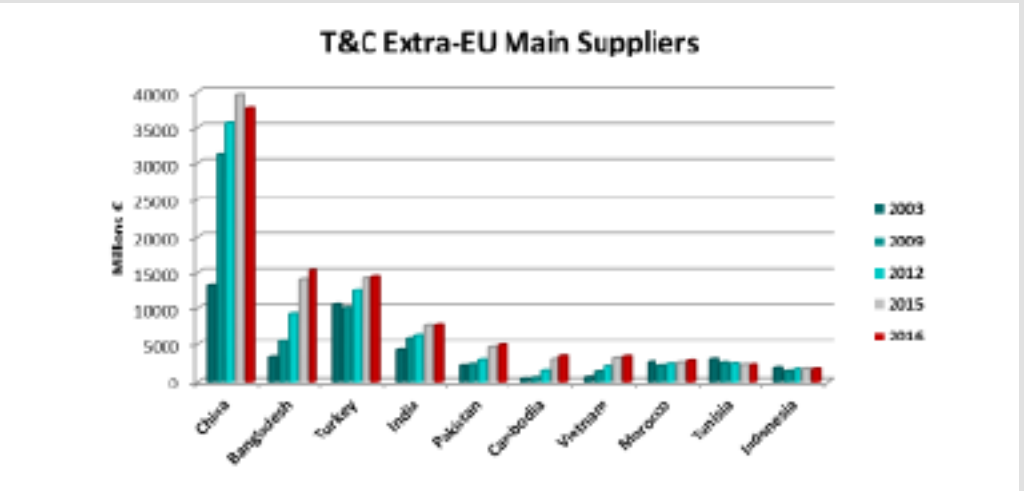
In 2016, the EU-28 **Textile & Clothing industry considered as a whole** represented turnover €171 billion and more than €4 billion of investment. Thanks to a revival in EU activity, the 177,700 T&C companies still employ more than 1.7 million workers. EU external trade was more dynamic than in the previous year, with €45 billion worth of T&C exports and €110 billion worth of imports from Third markets.



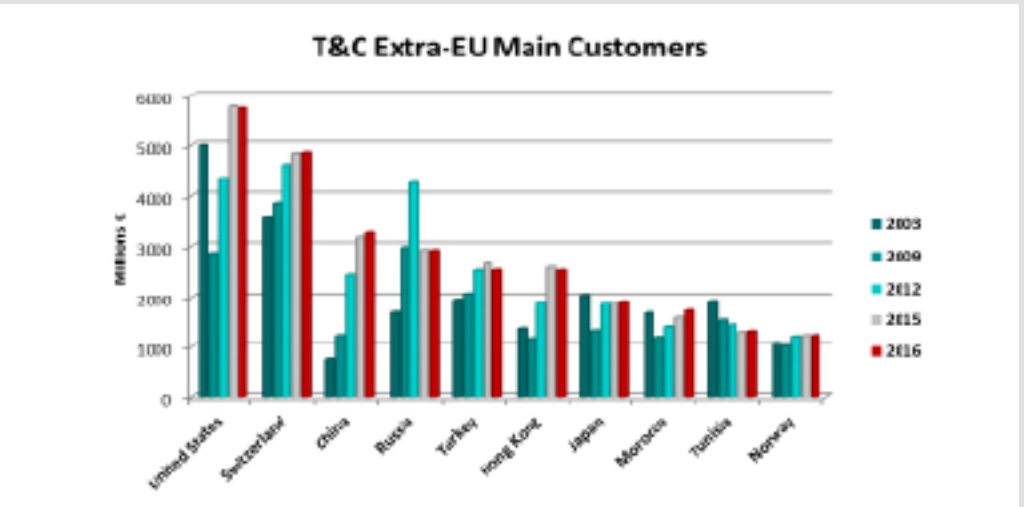
Among T&C subsectors, the manufacturing of outerwear was the main contributor to total **turnover**. The manufacturing of made-up textiles, together with other textiles (including technical textiles & carpets) were also major activities that had the highest shares of turnover among the textile subsectors. Furthermore, these were the only two activities to strongly increase their turnover share in the total T&C industry between 2005 and 2015.



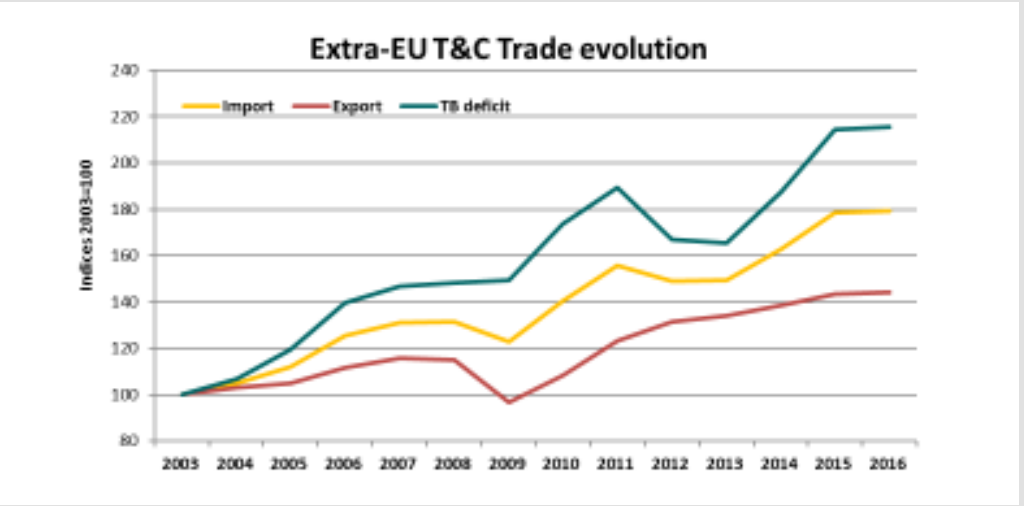
The Textile & Clothing industry is among the largest industrial branch in the EU. The industry accounts for some 5% of **employment** and 9% of **companies** in the total EU manufacturing sector, as well as over 4% of total goods exported. Many companies are concentrated in Italy and more than half of the EU employment is concentrated in four countries. Apart from the main employer (Italy), the other big employers were in Romania, Poland and Portugal.



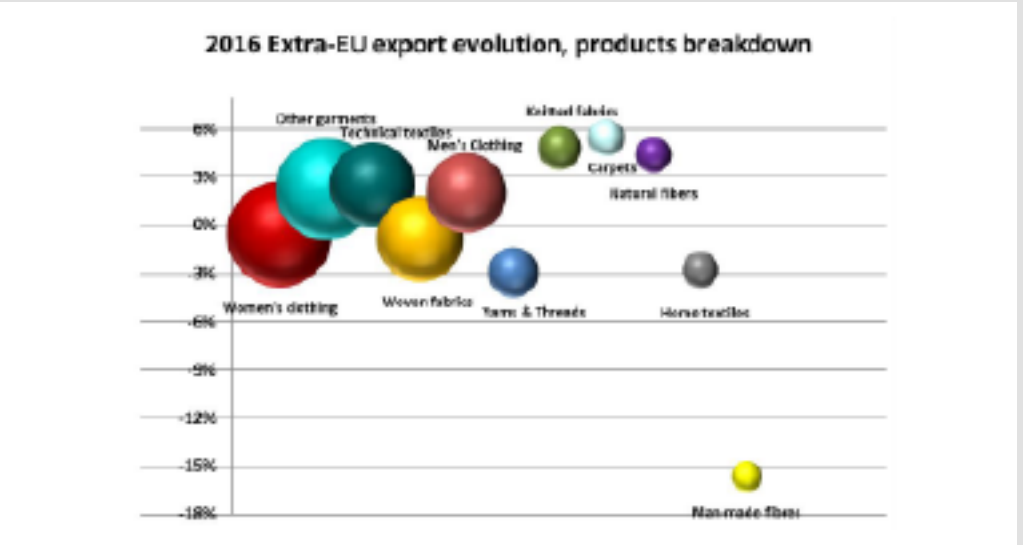
During 2016, T&C **extra-EU imports** slightly increased by +0.5% in value terms, due to increases from some Asian countries. China remained the main EU import partner, followed by Bangladesh, Turkey and India.



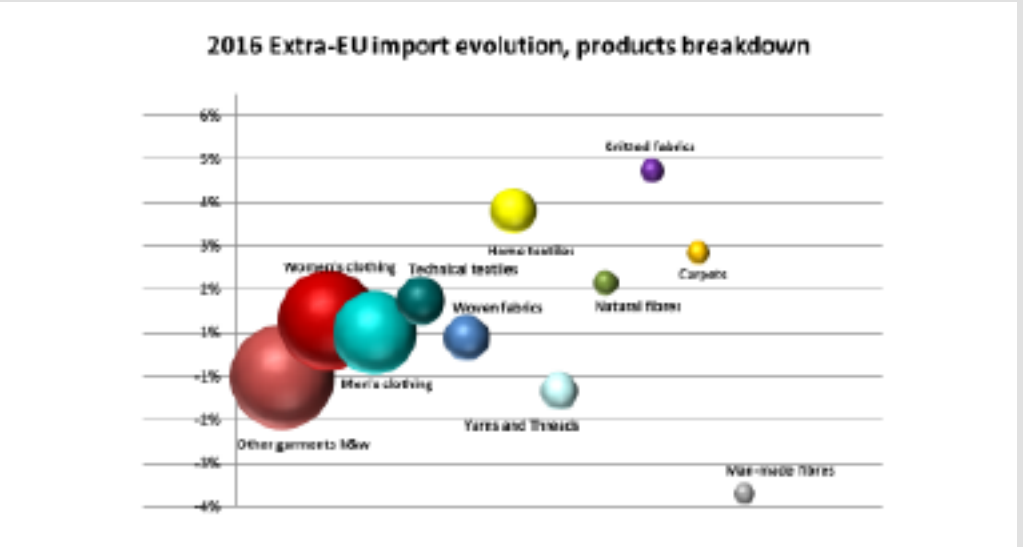
The EU faced subdued **export** growth in 2016 due to weakness in its main customer markets (Switzerland, China, Japan) and to falling sales to Russia, Turkey, Hong Kong and the US (the EU's top customer).



2016 saw the slowest growth in exports since the financial crisis. Sluggish growth was also recorded in Extra-EU imports. In 2016, EU imports reached around €110 billion and exports almost €45 billion. This evolution impacted on the EU's overall trade balance, adding slightly to the deficit.



The breakdown in the textile sector suggests that the best **exporter performances** in Third markets were achieved for carpets, knitted fabrics, natural fibres, technical textiles, and some clothing articles and accessories.



The breakdown of **imports by category** indicates an increase in most products in the value chain, with the exception of yarns, man-made fibres and some clothing articles and accessories. Home textiles, knitted fabrics, and carpets were the products with the largest increases. Clothing products remained the most imported articles.

NB: The % data represent the evolution based on the same period from the previous year, whilst the sizes of the bubbles are determined by the values (in €).

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PRESIDENT'S FOREWORD



As the new President of EURATEX, I do believe that our industry should focus on **three clear areas**:

- the importance of free and fair trade between key global trading partners
- the vital role of sustainability in the European textile and clothing industry
- the need to intensify market-driven applied research to defend Europe's position as an innovation leader in the global marketplace

Exports outside Europe are an important engine for growth in the EU textile and clothing industry since sales in third markets represent more than 26% of the yearly total turnover. Access to third markets with important trading partners is a key political element and should be set on a **fair** basis to ensure a **free access to end markets** in which innovative and creative European textile and clothing products are in demand.

I will keep advocating to the Commission the importance of delivering fair deals for our industry. Only through an industry-focused negotiation that aims to cut high tariffs and address the trade hurdles hampering today's exchanges for SMEs can the Commission and trading partners deliver the best benefits to the EU textile and clothing industry.

Europe shall also renew its focus on better market surveillance and enforcement to ensure that EU imported products comply with the same rules that bind EU producers, and to guarantee safe and fair EU consumer markets. This is 'common sense' and the best way to effectively protect European consumers while guaranteeing a level playing field.

The EU regulatory framework already provides the most extended and comprehensive set of social and environmental rules. And today, the European textile and clothing industry already acts responsibly, with more and more companies placing sustainability at the core of their strategy to diversify, compete globally and respond to the demands of conscious consumers.

Therefore, EURATEX has made **Sustainable Businesses** one of the **core policy areas** and is redoubling its efforts to address the environmental and societal challenges and opportunities in short and long term.

As a result, our new collaborations with industries, EU Institutions and international stakeholders have already started to deliver results. We have been firm advocates of our

industry and its needs, convinced as we are that collaboration and mutual understanding are key to boosting sustainable growth and to ensuring sensible legislation is brought forth, for example to replace harmful chemicals.

Experience shows that politicians change their perception when we can demonstrate that our companies are both important **innovators and adopters of advanced technologies**. More importantly, although this fact is seldom realised, many everyday goods need textile products to work or even to exist.

I strongly believe that Europe should **strengthen** the **applied research** dimension so that our companies can **bring innovative textile solutions to market** more quickly, and remain one step ahead of international competition. This is a crucial objective that both EURATEX and the European Technology Platform for the future of Textiles and Clothing will pursue relentlessly.

Our companies must be able to better use the unparalleled network of high quality research, technology and education infrastructures that exists at regional, national and European level. I count very much on our **RegioTex initiative** to boost the implementation of our new Strategic Innovation and Research Agenda at regional level.

All the above will not happen if we – the industry, public authorities and education providers - fail to invest and work together to preserve and enhance the **skills and knowledge**

base of our sector. This will require a massive and concerted effort which is beyond the capacity of individual companies, regions or even countries.

I would like to close my words by stressing the need for the **EU to adopt a dedicated and ambitious industrial policy**. EURATEX supported a 126-industry sector common declaration signed in early 2017 on this topic. Commission and Member States must go beyond words and take a holistic approach which effectively addresses all the key challenges in a coordinated way and successfully promotes a manufacturing re-birth in the EU.

KLAUS HUNEKE,
EURATEX President

TRADE & INDUSTRY

SETTING THE FRAMEWORK

A GENUINE INDUSTRIAL POLICY IS KEY FOR THE EU

The textile and clothing (T&C) sector is a powerhouse of manufacturing industry in Europe. In recent years, several positive trends have emerged in our sector, with growth in exports, turnover, the number of companies and even employment. In spite of stiff global competition, our companies have increased their sales thanks to growing consumer confidence in the EU-28. However, Europe could have done more since it still lacks a proper industrial policy. For some years now, EURATEX has advocated the need for a genuine and coherent industrial policy at European level that supports the competitiveness of companies in the EU, and helps counteract the policies implemented by its main competitors, such as China and the USA.

In a nutshell, the message delivered repeatedly to Commissioner Bienkowska in 2016 was that in order for the T&C sector to pro-

mote the high quality of our European products and their compliance with high EU social and sustainability standards, there has to be coherence between: [a] promoting “**industry-driven**”, **free and fair access to third markets**, together with increased activities to encourage **international expansion for SMEs**; [b] the need to preserve a **competitive manufacturing** base through fostering investment at a local level; and [c] the need to have an improved and properly functioning **Single Market**. For the latter to become a tangible reality, authorities must refrain from adding new European constraints on resources and on EU companies, whilst imposing the same constraints on non-EU producers through better import controls and stricter market surveillance to safeguard consumer health & safety and to ensure the sustainability of T&C businesses in the EU.



"We call on the European Commission to propose an Action Plan to tackle the challenges that the industrial sectors are facing"

#INDUSTRY4EUROPE



How to transfer political focus into visible results for the European T&C industry

By meeting with the Commissioner for Internal Market, Industry, Entrepreneurship and SMEs at the beginning of the year, EURATEX's President was able to underline the focus of his confederation's efforts:

- ▶ **Juncker Investment Plan:** A significant textile project should be included in the Juncker plan. In March 2016, European silk producers presented their project "Towards a European Sericulture" during the workshop on "EU funding opportunities for the fashion, textiles, and cultural and creative industries".
- ▶ A **marketing campaign** to promote the high quality of our European products and their compliance with the EU's high level standards.
On 18 October 2016, EURATEX organised a breakfast event hosted by three Members of the European Parliament (Tokia Saïfi, France; Alessia Mosca, Italy; Inmaculada Rodríguez, Spain) entitled: "Talking about Textiles in the European Parliament". Textile entrepreneurs from various European regions spoke about their innovative businesses and their priorities for a more efficient Europe and for trade facilitation.
- ▶ **Internationalisation of SMEs is critical.**
Completion of the country report in technical textiles in Brazil, Japan, South Korea and the US marks a major achievement. It will help European companies active in this sector gain better access to these markets. An additional COSME project for awareness-raising of FTA is to be launched.
- ▶ **Market Surveillance:** Fair conditions. New European constraints on resources should not be imposed on EU producers when the EU/ Member States cannot impose these same constraints on non-EU producers, or control imports.
- ▶ **Enhancing modernisation of value chains** by promoting digitalisation and interoperability.

Additionally, there is a need for: [a] visible and improved access for SMEs to EU innovation and R&D instruments by simplifying the administrative procedures at European level; [b] more focused support on T&C activity among industry SMEs to develop and upgrade skills; [c] effective protection for

creativity in its broadest sense, from designs and patents to copyrights and trademarks, as a means to safeguarding the competitiveness of our companies; [d] recognition of the widespread adherence to sustainability principles by T&C companies in the EU.



Finally, EURATEX helped to deliver and monitor concrete solutions and tools that will support the competitiveness of companies going forward. For instance:

- a) EURATEX worked for a smooth and less expensive implementation of the upcoming **Personal Protective Equipment Regulation**, which is replacing the PPE Directive.

EURATEX advocated for a common approach in all European countries to avoid distortions in PPE markets; in particular, EURATEX kept pursuing the harmonisation of procedures among the accredited test laboratories (called Notified Bodies or NB) concerning the validity of the test reports, which are necessary for companies to get the CE Mark.

In coordination with its Members and other stakeholders, EURATEX addressed directly several NBs and national authorities and urged the parties to adopt the harmonised procedure which was jointly agreed in 2015 to avoid unnecessary and costly testing for companies. The positive response of some NBs encouraged EURATEX and Members to keep working for full harmonisation.

- b) EURATEX has been closely monitoring several initiatives and programmes in the field of **intellectual property rights** (IPR) whose results might be beneficial to T&C SMEs, including: [a] the IP Key Programme, presented by DG Trade, whose purpose is to prepare, support and implement the IPR chapters of different Free Trade Agreements (FTA) negotiations, e.g. in South-East Asia and Latin America; [b] the development of an “IPR at the Service of SMEs to Foster Innovation and Growth” approach whose structure could provide objective support to the effective use of IPR by SMEs, in particular in the T&C sector; and [c] the ongoing efforts by the European Commission to deliver better IPR protection for companies in third markets. The latter exploits the leverage of existing trade and/or cooperation agreements with trading partners, enabling the Commission to periodically quiz industries about the practical IPR problems they face when accessing third markets, and organise IP Dialogues with the enforcement authorities in the respective countries (Customs, Justice, Culture, IP offices, etc.) to resolve specific problems faced by small and medium-sized companies in protecting their IPR

MORE TRADE FOR MORE GROWTH

In 2016, the key priorities for the textile and clothing (T&C) sector in trade negotiations were, unsurprisingly, the **EU-Japan EPA** (Economic Partnership Agreement) and the **TTIP** (Transatlantic Trade and Investment Partnership) talks. **Access to third markets and the promotion of free trade go hand in hand with a strong industrial policy.** EURATEX has worked closely with its members, as well as the EU institutions, to continuously promote the needs and specificities of the European T&C sector.

Negotiations on FTAs remain at the core of EURATEX's efforts to achieve predictable, simple and practical outcomes in our trade relationship with third countries that are

also the most favourable to the T&C sector. Constant work on rules of origin and regulatory cooperation continues. The objective is to facilitate and enhance trade in textile and clothing goods with key partners like the US and Japan.

► EU-Japan EPA

Further to several technical meetings between EURATEX and the JTF (Japan Textile Federation) in Milan and Tokyo, industries from both parties agreed on the rules of origin to be laid down in the Agreement. As a result, a Joint Statement was published in October 2016, which can be accessed via our website.

► TTIP

Great steps were achieved in 2016 towards better regulatory convergence and better understanding on the rules of origin for the Textile & Clothing sectors.

EURATEX conducted intensive work with its members, its American counterparts and the EU institutions to examine the details of the textiles provisions in depth. These efforts mainly comprised: demands for double transformation rules of origin; opening up public procurement; aligning labelling requirements and restricted chemical lists.

Communication about TTIP is as vital for civil society as it is for the EURATEX membership. In this view, EURATEX has created a webpage dedicated to the benefits of TTIP for textile and fashion:

<http://euratex.eu/pages/ttip/>

► Pan-Euro-Med

The Pan-Euro-Mediterranean Convention remains the T&C sector's first priority as the best instrument for enhancing industrial complementarities within the zone. In 2016, three major steps were taken in that regard, and EURATEX is following these closely:

◆ *Jordan* In July 2016, the EU and Jordan agreed to simplify the rules of origin for textiles that Jordanian exporters use in their trade with the EU under the Association Agreement. This is intended to make it easier for Jordan to export to the EU, encourage investment and create jobs for Jordanians and Syrian refugees.

◆ *Tunisia* In September 2016, the EU decided to support the Tunisian economy by adopting a communication on "Strengthened EU Support for Tunisia", in which it is stated: "the EU will explore with Tunisia advanced implementation of the PEM rules, as well as temporary flexibility for certain products to be implemented as soon as possible".



Trade



◆ *Turkey* In December 2016, the European Commission asked the Council for a mandate to launch talks with Turkey to modernise the existing 20-year-old EU-Turkey Customs Union. EURATEX and its Turkish member agreed to participate in the process of updating the Customs Union.

China Market Economy Status and Trade Defence policies

2016 was an active year in rethinking EU-China trade relations. The issue of whether the EU should grant China 'market economy status' lay at the heart of the discussions. In November 2016, the EU Commission finally proposed changes to anti-dumping and anti-subsidy legislation with the introduction of a new anti-dumping methodology to determine market distortions associated with state intervention. The proposal is country-neutral and eliminates the existing list of non-market economy countries.

EURATEX conducted an intense consultation with its members. Meeting with the Head of Cabinet to the EU Commissioner for Trade, EURATEX stated its priorities for the EU-China trade relationship in the T&C sector as follows:

1. Efficient TDIs (Trade Defence Instruments) should be in place

The EU T&C industry needs tools that are adapted to its specificities and that are easy-to-use.

2. Market Access requirements should be met
Transparency and predictability are key for our trade with China.

3. Counterfeiting should be tackled and IPR should be enforced

Forming an EU-China Textile & Clothing Anti-Counterfeiting Workshop.

Market Access Strategy and follow-up on TBT (Technical Barriers to Trade)

Global improvement in market access for T&C products remains a top priority for EURATEX, taking into account all the Tariff and Non-Tariff Barriers that our companies have to face in third markets. Nevertheless, the EU remains the No. 2 exporter worldwide in textiles as well as in clothing (*cf. Facts & Figures*).

EURATEX actively participated in the Commission Market Access Strategy by mentioning the trade obstacles for T&C products in third countries. Heavy and burdensome registration procedures in Egypt and redundant testing in Turkey have been high on this year's agenda.

Thanks to the EU-India Joint Working Group on Textiles, EURATEX maintains a fruitful dialogue with India that enables monitoring of developments in Indian tax reform and cooperation on REACH regulation and labeling requirements.

RESEARCH & INNOVATION

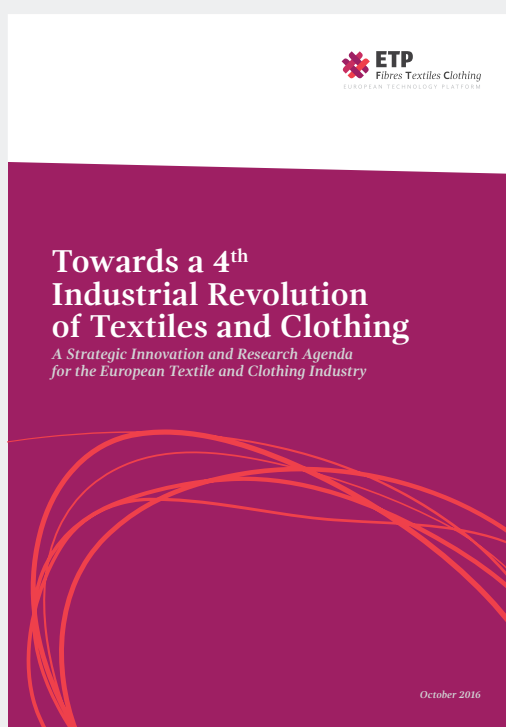
INVENTING THE T&C

INDUSTRY OF THE FUTURE

Towards a 4th Industrial Revolution in Textiles and Clothing. The title of the Strategic Innovation and Research Agenda published by the European Textile Technology Platform in 2016 expresses how far recent technology and market trends, such as digitisation, sustainability and a collaborative, sharing economy, are totally reinventing how and where textile and clothing products are designed, developed, manufactured and brought to the customer. The European industry may turn out to be a big beneficiary of these trends, which will see significant parts of the manufacturing and value creation process brought closer in space and time to the final consumer.

As the innovation pace accelerates around the globe, the sector is intensifying its efforts to conquer high-tech niches, increase its flexibility and time to market, and use its production resources in an ever more efficient, circular and waste-free way.

Key trends for the future include flexible, short-run on-demand production, digital manufacturing and supply chain management, customisation and service-based business models, sustainable business operations and the extended scope of applications for highly engineered and smart textile materials.



EURATEX has for many years advocated a smart support approach for the industry's research and innovation efforts through EU policies and programmes, especially those focused on SMEs closer-to-market collaboration projects. Since 2004, the European Technology Platform has played a key role in facilitating access to the EU programmes for European textile and clothing companies and their research partners.

EU RESEARCH & INNOVATION POLICIES: ROOM FOR IMPROVEMENT

The current **HORIZON 2020 Programme**, with its focus on several key societal challenges and the enabling of industrial technologies, covers all relevant research and innovation domains concerning the textile and clothing sector in Europe. **However, the researchers from within our industry who have already participated in HORIZON 2020 have had mixed experiences.** On the positive side, the focus on multidisciplinary and cross-sectoral collaboration to address concrete societal challenges suits a sector that offers a very broad range of material, process and product solutions for many end markets. The allocation of significant resources to key innovation themes, such as sustainability and circular economy or digitisation and new business models that are also squarely in the sector's innovation focus, has already led to the funding of several flagship projects. On the negative side, the size and complexity of most funding instruments are often beyond the reach of an SME-driven industry. The efforts required for proposal preparation coupled with low average funding rates have served to put off many researchers and key industry stakeholders who were eager and successful participants in previous framework programmes. Significant pre-defined budget allocations to a growing list of Public-Private Partnerships

(PPPs) limit the programme's flexibility and reduce the scope of high potential research topics that fall outwith the ambit of these PPPs. The poor success rates and inflated average project allocations characterising the SME instruments have narrowed their application excessively in favour of the most research-intensive and public funding driven part of Europe's SME community, which may not be the most impactful in terms of industrial investment and job creation.

EURATEX therefore calls for the following changes to HORIZON 2020:

- ▶ A reduction of average project size and funding level, with **more funding allocated to smaller, shorter term projects**
- ▶ A re-evaluation of the scope of PPPs, as well as of their funding allocations, in order to ensure that **ample funding opportunities exist for research priorities outside the ambit of these PPPs**
- ▶ A strengthening of economic impact criteria weightings, such as realistic industrial investment and job creation targets when evaluating project proposals, and **greater involvement of business experts** with the appropriate competences to judge such criteria **in the evaluation processes**
- ▶ The introduction of a new **SME-dedicated funding instrument based on cascading funding**, allocating very small-scale grants to SME-led consortia based on a simplified application, evaluation and reporting system



Textile ETP

DEVELOPING AND IMPLEMENTING AN AMBITIOUS STRATEGY FOR THE TEXTILE AND CLOTHING INDUSTRY OF THE FUTURE - THE EUROPEAN TEXTILE TECHNOLOGY PLATFORM

Thanks to a collaborative effort of its over 500 research, technology and industry experts, the Textile ETP delivered a new Strategic Innovation and Research Agenda (SIRA) for Europe's textile and clothing sector. The document outlines the main industry and market trends expected over the next 10 years, singles out four broad innovation themes and describes in detail some 20 research priorities.

The document was presented to the public in Brussels at the "European Textiles – Going Digital, Going High-Tech" high-level conference in October 2016 that was attended by over 150 participants from Europe. Innovation themes and research priorities were also discussed with EU policy makers and served as input to the mid-term review of



HORIZON 2020 and the starting preparations for the successor EU research framework programme post-2020. In December 2016, the Textile ETP met with the EU Commissioner for Research and Innovation, Carlos Moedas, to present our Strategic Agenda and share our views on the HORIZON 2020 Programme.

BUILDING STRONG INNOVATION ECOSYSTEMS ACROSS EUROPE'S TEXTILE REGIONS

THE REGIOTEX INITIATIVE

The Textile and Clothing industry in Europe is regionally clustered and the innovation performance of SMEs is strongly influenced by the existing local and regional support infrastructures. EU regional policies driven by the concept of Smart Specialisation offer excellent scope for the strategic development of regional sectoral innovation support ecosystems, such as clusters, technology transfer centres, incubators, and education and training facilities. However, **the potential of textile innovation is not always well recognised by regional policy makers** – a situation that the RegioTex initiative has set out to change.

RegioTex was launched in April 2016 by EURATEX and the European Textile Technology Platform on the occasion of the 11th annual public conference of the Textile ETP, held at the Committee of the Regions in Brussels.

- Encourage and enable “textile regions” to invest part of their EU structural funds into effective textile-related innovation support;
- Develop and strengthen regional industry innovation support structures (clusters, association, technology, education & training centres etc.)
- Build an active EU network of textile regions for peer-to-peer learning and facilitate bilateral and multilateral business and innovation collaboration
- Develop effective cross-regional funding instruments to support EU collaborative research, innovation or training projects by regional or national funds where EU funds are inappropriate or lacking (e.g. cross-regional SME innovation projects)



15 leading textile regions in Europe have since joined RegioTex and more regions are always welcome. Its objectives are to:

Support regional authorities to more clearly identify challenges and harness the potential of textile innovation for industrial renewal, new competitive manufacturing value chains and sustainable high-quality manufacturing jobs

During 2016, the European Commission launched the Smart Specialisation Platform for Industrial Modernisation to accelerate regional industry transformation and innovation investment across Europe. Thanks to the RegioTex initiative, Textile Innovation was recognised as one of the first thematic partnerships under this platform: <http://s3platform.jrc.ec.europa.eu/textile-innovation>

FROM EU RESEARCH TO THE MARKET

ECWRTI – Total water recycling
in textile industry



ECWRTI

RESYNTEX – A New Circular Economy
Concept for Textiles and Chemicals

RESYNTEX



The WORTH project has initiated cross-border partnerships between designers and SME manufacturers in the fashion, textiles, jewelry, footwear, eyewear, furniture and leather industries from different EU Member States in order to create innovative new products.

The textile sector is a tremendous water consumer and producer of chemically enhanced wastewater. Considering the issue of water scarcity, the ECWRTI project aims to move towards total recycling of water by removing pollutants from textile finishing and by returning clean water into the manufacturing processes.

The ECOLORO concept, the core of this project, uses electrocoagulation and membrane processes to close the water loop.

The goals of the project are: to reduce fresh water intake by almost 90%; to fully eliminate wastewater discharge; to reduce chemical waste and colorants; to increase the overall energy and resource efficiency of textile mills by more than 50%.

EURATEX helped assessing the research early results through international experts. Cooperating with its Italian member SMI, EURATEX also helped identifying a textile company to join the project and test technologies.

Currently, the project team is setting up pilots in Belgium and Italy and is investigating further market, economic and environmental aspects to commercialize the technology.

www.ecwrti.eu

Through an innovative recycling approach and a synthesis of expertise, RESYNTEX will transform textile waste into secondary raw materials, creating circularity and reducing environmental impact. Europe needs to move towards a more circular economy in order to preserve its future environment and society. Currently, many of the materials contained in products are discarded as waste after use. The textile industry is no exception. Much of its waste is landfilled or incinerated with a high environmental impact and tremendous cost. Valuable resources that are held within the waste are being lost.

RESYNTEX aims to change this through research and innovation. EURATEX and CEFIC, the European Chemical Industry Council, are jointly working on economic and regulatory scenarios that can make the RESYNTEX concept truly viable and sustainable.

www.resyntex.eu

WORKING FOR SUSTAINABLE BUSINESSES

2016 was a year of **transformation** for EURATEX's work on sustainability. Its diverse activities were reorganised and unified under a new name: "Sustainable Businesses" (SB).

This transformation has redefined EURATEX's core policy areas, focusing on the three themes of: Trade & Industry; Research & Innovation; Sustainability. It also reflected the seriousness with which the European industry now views sustainability, both in terms of **resources** and **social matters**.

After consulting EURATEX Members, three objectives were defined for the Sustainable Businesses policy area:

- To better address industry needs as regards resources and societal challenges

- To manage threats and opportunities of sustainability arising out of regulation, global value chains and consumer perceptions

- To promote the sustainable European industry and its image

By the end of the year, a new EURATEX SB team was operational, working with colleagues and EURATEX Member delegates on 32 different working items, in the areas of: Chemicals and REACH legislation, the Circular Economy, Energy and Climate, Corporate Responsibility and Sustainable Supply Chains.

CHEMICALS AND REACH LEGISLATION

This represents a very challenging area to work in due the complexity of the issue, the number of regulatory actions and the profound impact of chemicals-related requirements and legislation on the full value chain, both in fashion and technical textiles.

EURATEX and Members addressed **several chemical restrictions**, notably PFOA, DMF, NPE and CMR substances in textile articles for consumers (all SB priorities) by defining the industry's needs and presenting the key issues to the European Commission and the EU Chemical agency, ECHA. To anticipate upcoming threats, EURATEX has also moni-

tored regulatory changes on a frequent basis, as well as intensified its collaboration with the EU institutions and business organisations whilst also informing and exchanging input with Members. At the year's end, further actions began to support the replacement of harmful chemicals and collaboration along the supply chain.

The work done jointly with Members has delivered very **successful results**, particularly as regards the derogations granted in the PFOA restriction, as well as the progress made on the CMR restriction (see boxes).

Potential restriction of CMR substances in textiles and clothing

Solicited by Member States, business and civil society organisations, the European Commission launched a restriction proposal for carcinogenic, mutagenic and reprotoxic chemicals in textiles and clothing that initially covered more than 280 chemicals. The approach aroused great concern over its scope, the lack of a social economic assessment, and the potentially disruptive impact on the supply chain. EURATEX adopted a **collaborative approach to pursue a feasible and enforceable proposal that benefits consumer safety**. Coordinating with its Members and other business organisations, EURATEX addressed the Commission REACH unit with policy and technical contributions that effectively contributed to drafting a new list enumerating a shorter more sensible and revised scope (about 50 chemicals). Advocacy work continues in 2017 with workshop participation by Member-appointed EURATEX delegates that focuses on the scope of the restriction and the justification for variable limits in special cases.

PFOA restriction process under REACH

PFOA, a substance crucial for many technical textiles and Personal Protective Equipment (PPE), has been considered for a restriction since 2015. The initial draft restriction proposal did not sufficiently take into account the need for oil and chemical repellence which are crucial for worker protection and compliance with EU and international safety standards. In response, EURATEX and its Members' Delegates - particularly Germany, Belgium and Austria - **strongly advocated for justified derogations based on company evidence and technical input**. The industry's reasoning and evidence have been openly discussed with public authorities and recognised by a new legislative proposal including the derogations needed for workers' protection.

At the international level where PFOA has been considered as a persistent organic pollutant under the Stockholm Convention, EURATEX also provided input that has been considered by the UN delegates, with a final outcome expected in 2019.

In parallel, EURATEX has engaged with international experts, companies and research projects to begin collaborating to find PFOA replacements which can effectively meet company and safety requirements. Follow-up meetings have been scheduled for 2017.

THE CIRCULAR ECONOMY

EURATEX has worked to investigate the opportunities and challenges arising from the European Commission's new Circular Economy policy package which aims to **maximize the value of resources through recycling and more efficient use of raw materials, waste and water**. EURATEX monitored progress on the main dossiers and discussed developments with EU officials and

its Members. Collaborative projects into industrial symbiosis and water treatment in textile plants are in progress (c.f. RESYNTEX and ECWRTI projects, page 15). Learning on the Circular Economy and its impact on business improved throughout the year and eventually led to the topic being defined as a new priority to be further deepened in 2017, when a new policy paper will be launched.

ENERGY UNION AND CLIMATE CHANGE

EURATEX pursued its “**Energy Made-to-Measure**” campaign to promote Energy efficiency in textile and clothing manufacturing, while looking at developments in the ETS (Emission Trade Scheme) under negotiation within the EU Institutions. In the second half of the year, the SET project was successfully accomplished, creating awareness, and delivering consulting services at the doorsteps of SMEs, as well as offering an indicative benchmarking service. As many as 145 companies were helped by the eight project partners, three other EURATEX members and coordi-

nated by EURATEX, bringing tangible results in 11 EU Member States and 11 languages.

To support more European SMEs to consider investments, best practices and gains from energy efficiency, EURATEX was particularly active in communications, supporting dozens of meetings across Europe; presenting at Première Vision Paris in September 2016; producing a video with industry testimonials and publishing a report of SET action in eleven European countries entitled: “Time for Energy Efficiency in Textile SMEs”.

Country	Objective	Selected companies	SET Scheme applied in	Valid datasets in SET Web
Germany	38	58	20	18
Czech Republic	20	24	20	20
Hungary	19	21	20	31
Belgium	19	30	6	8
Romania	20	21	22	21
Italy	19	17	27	28
Portugal	19	23	20	16
Bulgaria	3	3	3	3
Croatia	3	6	5	5
Lithuania	3	3	3	3
France	0	1	1	1
Total	150	207	145	153



CORPORATE RESPONSIBILITY AND SUSTAINABLE SUPPLY CHAINS

In 2016, EURATEX was increasingly active in European and International forums, ensuring that the voices and concerns of European SMEs were heard and appreciated.

EURATEX and Members coordinated to present a **joint position on the EU's Flagship initiative** which pursued due diligence and fair business practices in global supply chains. Having defined a position, EURATEX met with and advised Members of the European Parliament and the European Commission. Earlier in the year, EURATEX coordinated with the OECD, providing inputs, mostly related to SMEs needs, in the framework of the OECD Due Diligence Guidance for

Responsible Supply Chains in the Garment and Footwear Sector. Throughout the year, EURATEX in collaboration with its Members and the Union association IndustriAll Europe made progress on trialling a new web-based Risk Management tool for SMEs to evaluate and address due diligence in their value chains (see box).

In the final weeks of the year, EURATEX was invited to Beijing to provide the European industry perspective and policy input at an event organized by the United Nations Environmental Programme, bringing together key stakeholders from the textiles and apparel value chains between the European Union and China.



EURATEX and its Social Partner, IndustriAll Europe, backed by the EU Commission are working together to develop a *Corporate Social Responsibility (CSR) Risk Assessment Tool* that supports companies, notably SMEs. Designed as an innovative web-based tool, it enables companies to identify and evaluate risks related to non-compliance with CSR principles in tier one suppliers, particularly in the areas of human rights, labour practices, the environment, fair operating practices and consumer issues.

Inspired by the ISO 26000 standard and by input included in the OECD Due Diligence Guidance for Responsible Supply Chains in the Garment and Footwear Sector, the tool was successfully tested through on-site visits to different European companies, representing the various stages of the T&C value chain. Full roll-out of this tool is to take place in 2017 in order to assist EU companies to become more sustainable.

www.responsiblesupplychain.eu/textile/

STAKEHOLDER ENGAGEMENT

Across all policy areas, EURATEX actively engaged with stakeholders from EU authorities, other industries and some NGOs to address high relevance issues which need actual collaboration to be tackled, including: **a level playing field; better market surveillance; chemicals restriction and replacement; a global chemicals list of products and processes** (RSL and MRLs). The main activities in 2016 included: meetings with EU authorities in DG GROW regard-

ing restrictions on CMR and PFOA; meetings with the European Chemicals Agency (ECHA) and the ECHA Forum which include market surveillance authorities from the European Member States; participation in and support of two different cross-sectorial platforms gathering experts from different industry sectors on chemical-related matters and many exploratory meetings to foster mutual understanding and collaboration in areas of mutual interest.



SOCIAL DIALOGUE AND SKILLS

OUR ROLE IN THE EUROPEAN SOCIAL DIALOGUE¹

For nearly 20 years, the European Textile and Clothing social dialogue has allowed EURATEX to develop joint actions with its European Trade Union representatives, and to conduct discussions on issues of common interest that impact on T&C companies (trade; education & training; sustainability; EU industrial strategy, etc.), thereby contributing directly to shaping EU legislation, policies and strategies for the industry as a whole.

With the aforementioned in mind, EU Social Partners have launched a **strategic study** to examine the present and future outlook for the T&C industry, as well as the future role of the EU social dialogue within that context.

During this study, statistical and qualitative information at national and European level will be collected to: [a] assess the activities of the EU-level social dialogue over the past 15 years; [b] evaluate the strengths, weaknesses, opportunities and threats (SWOT) of the sector and of its social dialogue; and [c] identify potential strategic priorities. Deliberations on the results of the study are to be conducted during eight meetings with social partners in Croatia, the Czech Republic, Finland, France, Germany, Hungary, Italy and Spain. The project will end in June 2017 and will define a **strategic roadmap for the future of the European-level Social Dialogue in the T&C sector**.

THE GROWING IMPORTANCE OF SKILLS

On 10 June 2016, the Commission adopted a new and comprehensive Skills Agenda for Europe. The political goal is to ensure that people develop a broad set of skills thereby making the most of Europe's human capital to boost employability, competitiveness and growth in Europe. This agenda stresses the importance of being in tune with the needs of industry when implementing the ten proposals over the next two years.

The textile and clothing sectors together with the leather and footwear industries

(TCLF) are identified as one of six key economic sectors that would benefit from dedicated action in 2017/2018 to **develop specific European skills strategies**. Their aim: to improve skills intelligence, address skills shortages and respond to the rising pressure on companies created by the growing integration of the digital, sustainable techniques and innovative business models needed to maintain their competitive edge.

Meanwhile, EURATEX became more active in skills by adding value from a European

1. The European Social Dialogue partners are IndustriAll Europe and EURATEX



© University of the Arts London

perspective to projects whose objective is to improve and enhance skills and to strengthen knowledge and, therefore, maintain the competitiveness of companies. Therefore, EURATEX took an active part in few areas of interest, the results of which should be available by the end of 2018 or mid-2019 and which cover:

1. New vocational, education and training (VET) curricula:

- The international expansion of T&C sector SMEs is a key vehicle for strengthening Europe's competitiveness. Despite some success, we need to amplify this approach by identifying the existing skill gaps among the export and marketing employees of these companies. This is the objective of the **EXTRO SKILLS** project, which leverages company experiences from several Member States (Greece, Romania, Spain, the UK plus many other EU-based firms) to **develop the profile of T&C export staff**, as well as to create an integrated curriculum based on European Qualifications Framework (EQF) and European Credit system for Vocational Education and Training (ECVET) principles. This project will produce a multi-lingual ICT-based platform that will be a useful tool to deliver well-structured **training for T&C companies and their staff**. It will also be valuable for other projects and actions in support of the international expansion of T&C companies.

- Creativity is a core strength of EU competitiveness which we ought to nurture, drawing on our European cultural heritage. The latter is sometimes ignored in the education and work of in-house and young fashion designers. EURATEX is a partner in the **ART-CHERIE** research project (*"Achieving and Retrieving Creativity through European Fashion Cultural Heritage Inspiration"*) whose aims are: to help protect and **exploit the EU's Cultural Heritage in Fashion** and to organise and structure this heritage through vocational **training courses** for the improvement of EU fashion designers. Other partners include a university, industry associations and heritage companies from Greece, Italy and the UK. The pilot project will collate information and digitise material from Prato Textile Museum in Italy. The design tool developed as part of this project will shape the vocational training of EU fashion designers, encouraging them to use precious knowledge about the past and current state of fashion to improve their designs and boost the added value of their garments. These outcomes will be linked to existing or future initiatives at a later stage.

2. Apprenticeship tools

With the *"Integrated Strategic Initiative for Strengthening the Supply of Apprenticeships in the Textile Sector"*, **TEXAPP** project, EURATEX and its partners are seeking to **nurture**



Skills

and strengthen the provision of apprenticeships for SMEs and micro enterprises active in the sector. Building on the experience of five Member States (Bulgaria, Hungary, Italy, Portugal and the UK), TEXAPP project partners will create and provide a structure and tools that are geared towards the T&C sector, taking into account the needs of SMEs and the obstacles they face when considering apprenticeships. This future sectoral tool package will focus on assisting SMEs to set up, plan, deliver and quality assure their apprenticeships, including apprentice assessment.

3. Identification of new skill needs

With the support of EU Textile, Clothing, Leather and Footwear (TCLF) Skills Council partners, EURATEX embarked on the **DIGITAL TCLF 2025** project whose objective is to address the need to provide the TCLF sectors with the **appropriate skills and competencies to face the digitisation of EU value chains** dominated by SMEs. Partners will work on: [a] forecasting the future impact of these occupations in terms of European employment and the strategic development of the TCLF sectors and their SMEs; [b] identifying gaps between the current provision for these emerging occupations by Vocational Education and Training (VET) providers; [c] drafting innovative VET & Training Programmes, together with competent and relevant stakeholders, who have been selected based on their potential for involvement in future industry activities.

These efforts should be complemented by fostering recognition of skills within the sectors and defining a roadmap for Digital Skills development in the TCLF sectors that includes industrial strategies and training provision, be they VET-based or based around other education and training activities that are tailored to SMEs and their workers, and which will be appealing to younger generations.

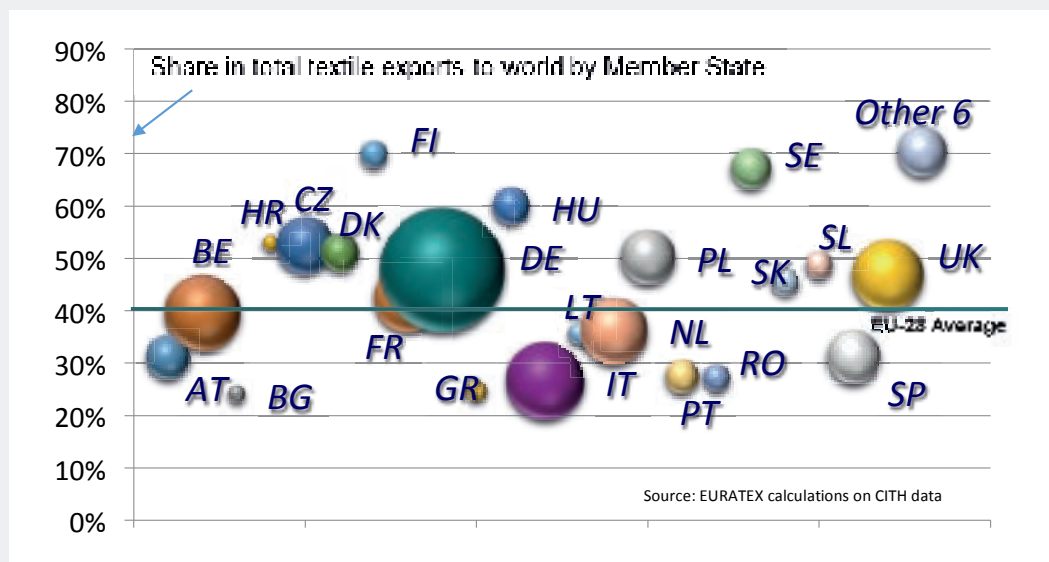
FOCUS ON TECHNICAL TEXTILES

EU TRADE IN TECHNICAL TEXTILES

Note: In this section, technical textiles are based on a wider definition covering also textiles from HS chapters 30, 39, 40, 48, 68, 69, 70 and 96.

1. Technical textile share of world exports

(Bubbles: size of TT exports to world - Member States size – clothing excluded)

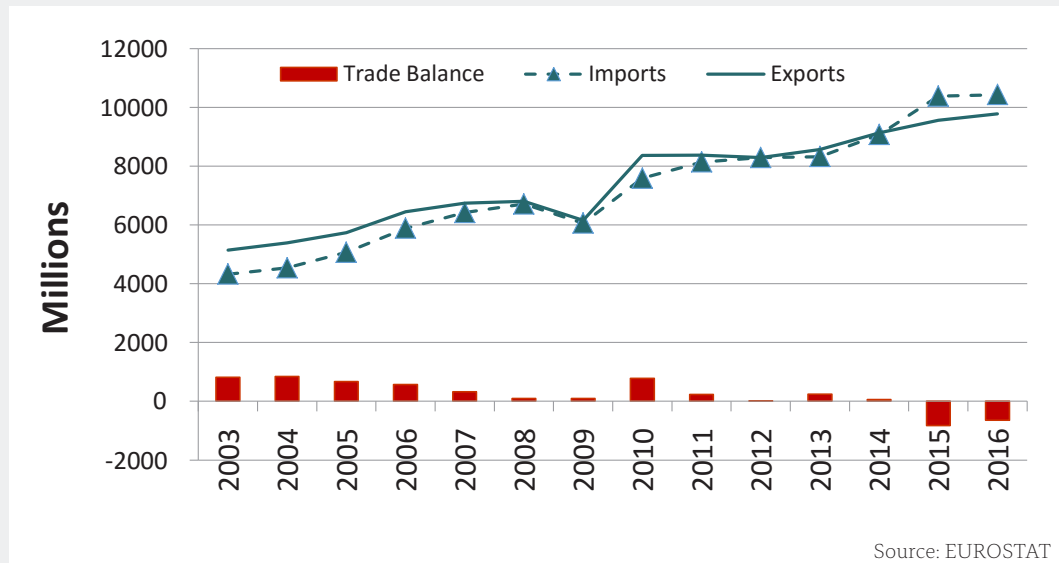


EU-28 Exports to the World in 2016

The top 5 exporters of technical textiles (Germany, Italy, France, United Kingdom and Belgium) represented almost 60% of total exports to the world from Member States. Moreover, the Member States for which technical textiles represented the highest share of their textile exports (excluding clothing) were Croatia, Finland, Denmark, Sweden, Czech Republic and Hungary.

EU countries are the main export destination markets for technical textiles, in particular for companies originating in Slovakia, the Czech Republic, Croatia, Bulgaria, Belgium, Hungary, Denmark, the Netherlands, Romania, Portugal and Poland (with Intra-EU shares above 71%).

2. 2003-2016 Trade evolution in technical textiles – EU-28 – €



In the last 14 years, trade in technical textiles has expanded rapidly, doubling since 2003 to reach a total (Imports + Exports) of over €20 billion in 2016. This was divided equally between Extra-EU exports and Extra-EU imports. Despite the slowdown in 2016, EU imports have been more dynamic than exports over the period.

As was the case for other sectors, technical textiles have been strongly impacted by the 2009 financial and economic crisis with a slump in Extra-EU trade.

After consistently reducing the trade surplus to a near-balance between 2008-2014, the EU's balance of trade has again turned to

deficit since 2015. This demonstrates the impact of globalisation and of increasing international competition. We should note that EU export unit prices are on average 60% higher compared to import prices.

The importance of technical textiles is growing both for exports and imports:

- Exports of technical textiles today represent 38% of EU textile sales outside the EU-28, compared to a share of 26% in 2003
- Imports of technical textiles reached almost 32% of textile products bought outside the EU-28, against 21% in 2003





EU TECHNICAL TEXTILES: CONSUMPTION AND TURNOVER

Weight of technical textiles in turnover in the EU-28



The technical textile sector has registered positive economic and employment trends in the EU and is today a major contributor to the EU-28 textile industry (excluding clothing).

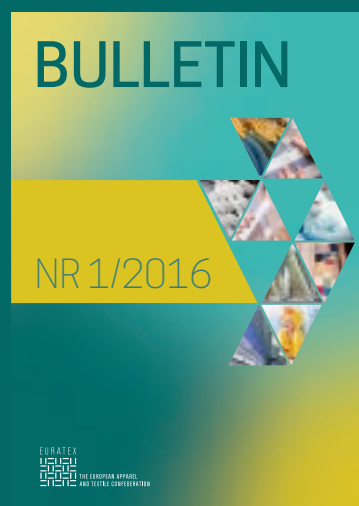
► 8% of the companies active in the textile sector

► 23% of the turnover of the sector – this varies strongly according to country (see graph)

According to Eurostat figures, based on a narrow definition, EU-28 technical textiles represent:

► 15% of total textile employment

The size of the companies is nearly twice that of the textile ones in terms of employment/company and 2.5 times the size in terms of turnover.



YOU WANT TO KNOW ALL THE FACTS & FIGURES OF THE TEXTILE & CLOTHING SECTOR? SUBSCRIBE TO EURATEX BULLETINS!

- **Bulletin No. 01/2016** provides an in-depth analysis of EU Textile and Clothing External Trade for 2014-2015. It incorporates trade trends by sector (i.e. natural & man-made fibres, yarns & threads, woven & knitted fabrics, carpets, home textiles, occupational wear, men's & women's clothing); as well as by product (around 140 products i.e.: cotton yarn, denim fabric, bed linen, woven trousers etc.); and by EU trading partner. (33 countries - EN & FR)
- **Bulletin No. 02/2016** begins with an analysis of EU external trade in 2015, both for the industry worldwide and for those countries that are the main suppliers or customers of the EU. It also evaluates the weight of regions and sectors in EU trade during the period under review. The second part is a special report with tables and graphs for each of the main 33 EU trading partners. (EN & FR)
- **Bulletin No. 03/2016** provides detailed country reports covering the economic situation in the Textile and Clothing Industry in 2015 and its outlook for 2016. These reports are written by the associations from each EU-28 Member State, as well as from: Africa, Argentina, Belarus, Brazil, Colombia, Egypt, India, Indonesia, Japan, Korea, Macedonia, Norway, Serbia, Switzerland, South Africa, Sri Lanka, Taiwan, Tunisia, Turkey and the USA. (EN)
- **Bulletin No. 04/2016** gives an insight into how the Textile & Clothing sector evolved in 2015, its short term prospects and the General European Economic Forecast Autumn 2016. It includes EU consolidated changes, trade estimates and basic structural data (production index, production prices, turnover, investments, household consumption, retail trade and consumer prices). (EN)

The Bulletins No. 01/2017 and No. 02/2017 are already available!

For more information and subscription, contact Roberta Adinolfi
roberta.adinolfi@euratex.eu

EURATEX AND THE MEDIA

In 2016, EURATEX produced press releases, articles and position papers whose collected European and international media coverage:

PRESS RELEASES

- ▶ EU Trade in textile & clothing goods went up in 2015, February 2016
- ▶ Investment plan for Europe to support European silk sector? March 2016
- ▶ Boosting regional textile innovation with RegioTex, April 2016
- ▶ Klaus Huneke Nominated as the Next EURATEX President, June 2016
- ▶ Commissioner Bieńkowska at EURATEX 20th Anniversary: Textiles is a Strategic Sector in Europe, June 2016
- ▶ The UK's EU Referendum, June 2016
- ▶ EU Trade surge in technical textiles and clothing goods, June 2016
- ▶ China's share in EU imports declined in 2015 to the benefit of South Asian countries, July 2016
- ▶ Smart talking on energy, in fashion, September 2016
- ▶ European and Japanese textiles industries hand in hand for the conclusion of the EU-JAPAN FTA, September 2016
- ▶ Launch of the TEXAPP project to strengthen the supply of apprenticeships in the fashion sector, December 2016
- ▶ The 5th EURATEX convention devoted to "Europe at the service of the creative industries" was a great success, December 2016
- ▶ Launch of the ART CHERIE project to exploit the fashion Cultural Heritage for the improvement of EU fashion designers, December 2016

POSITION PAPERS

- ▶ Response to public consultation under REACH on restriction of CMR hazardous substances, March 2016 → The position had a positive impact on the process
- ▶ EURATEX with several business groups express their continued support for TTIP negotiations, September 2016
- ▶ The EU Flagship initiative on the garment sector - EURATEX position, December 2016

MEDIA

- ▶ Stitching up the EU-Japan Trade Deal, published by EURACTIV, February 2016
- ▶ Will Smart Specialisation impact Europe's textile regions? published by EURACTIV, April 2016
- ▶ European Textiles and Fashion: Facts & Figures, published by EURACTIV, May 2016
- ▶ Save Energy in Textile SMEs (SET), video available on YouTube, October 2016
- ▶ Now's the time for wise substitution, published on ECHA website, November 2016

EURATEX AND THE EVENTS

In April 2016, EURATEX supported IT4Fashion in Florence, the only European event exclusively focused on IT in the fashion Industry.

EURATEX organised two key events:

► Convention 2016 in Lyon

EURATEX, held its 5th Convention on 25 November in Lyon. The event was organised together with EURATEX' French members' federations: Union des Industries Textiles (UIT) and Union Française des industries de Mode et Habillement (UFIMH). The Convention was dedicated to the role of Europe in servicing creative industries in presence of more than 110 participants who came to listen at four round tables providing ideas and visions on how the Textile and Clothing creative industries are tackling the challenges ahead to maintain and support creativity. The key topics covered included the role of **creativity, investing on**

skills, Intellectual property and how innovation can be financed.

► General Assembly 2016 in Brussels

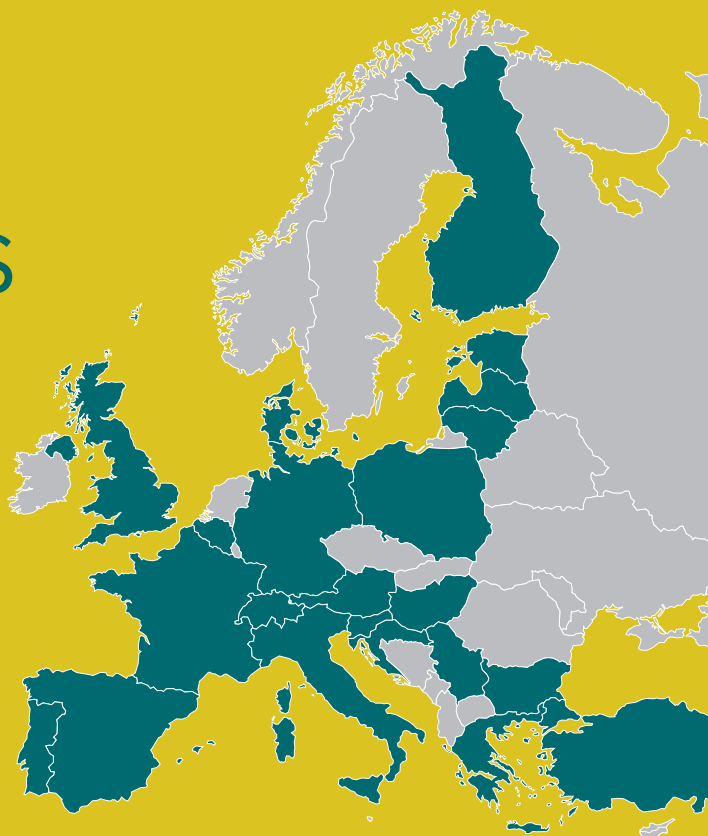
On 9 June 2016, EURATEX hosted the public session of its General Assembly devoted to inter-sectorial partnerships to boost European manufacturing with the theme 'Best in Partnerships'. The European Commissioner for Internal Market, Industry, Entrepreneurship and SMEs Elżbieta Bieńkowska addressed the audience in her keynote: 'Textile and fashion industry is a strategic sector in the EU and it is really performing well. The European Commission is undertaking several actions to meet three main challenges of the sector: innovation, international competition and skills shortage.' The Commissioner underlined that the European institutions are expecting full engagement of industry, because knowledge about the companies' needs should drive the development of new policies and programmes.



EURATEX
THE EUROPEAN APPAREL
AND TEXTILE CONFEDERATION

6TH EURATEX CONVENTION
THEME: BE COMPETITIVE
IN THE NEW GLOBAL ORDER
3 OCTOBER 2017
HOTEL PORTO PALÁCIO, PORTO

MAP OF MEMBERS



Austria:

- Fachverband der Textil-, Bekleidungs-, Schuh- und Lederindustrie – TBSL

Belgium:

- Fédération Belge de l'Industrie Textile, du Bois et de l'Ameublement – FEDUSTRIA;
- Belgian fashion – CREAMODA

Belarus:

- Belarusian State Concern for Manufacturing and Marketing of Light Industry Goods – BELLEGPROM

Bulgaria:

- Bulgarian Association of Apparel and Textile Producers and Exporters – BAATPE

Croatia:

- Croatian Employers' Association – CEA Textile and Leather Industry Association;
- Croatian Chamber of Economy – Association of Textile and Apparel Industry

Denmark:

- Dansk Fashion & Textile

Egypt:

- Ready Made Garments Export Council – RMGEC

Estonia:

- Estonian Clothing and Textile Association – ECTA

Finland:

- Finnish Textile & Fashion

France:

- Union des Industries Textiles – UIT;
- Union Française des Industries Mode & Habillement – UFIMH

Germany:

- Gesamtverband der deutschen Textil- und Modeindustrie – GTMI;
- Messe Frankfurt GmbH

Greece:

- Hellenic Fashion Industry Association – SEPEE

Hungary:

- Association of Hungarian Light Industry – AHLI

Italy:

- Federazione Tessile Moda – Sistema Moda Italia – SMI
- Miroglio S.p.A.

Latvia:

- Latvian Textile and Clothing Association – LATVIA

Lithuania:

- Lithuanian Apparel and Textile Industry Association – LATIA

Poland:

- Federation of Apparel and Textiles, Industry Employers - PIOT

Portugal:

- Associação Têxtil e Vestuário de Portugal – ATP

Serbia:

- Serbian Chamber of Commerce – Association of Textile and Clothing

Slovenia:

- Gospodarska Zbornica Slovenije – Chamber of Commerce and Industry of Slovenia, Textiles, Clothing and Leather Processing Association

Spain:

- Consejo Intertextil Español – CIE

Switzerland:

- Swiss Textiles

Turkey:

- Turkish Clothing Manufacturers' Association – TGSD/IHKIB;
- Turkish Textile Employers' Association – TTSIS;
- Turkish Textile and Apparel Exporters' Association – ITKIB

United Kingdom:

- Textile Forum – UKFT

Europe:

- International Association of Users of Artificial and Synthetic Filament Yarns and of Natural Silk – AIUFFASS;
- European Man-made Fibres Association – CIRFS;
- International Association Serving the Nonwovens & Related Industries – EDANA;
- European Federation of the Cotton and Allied; Textiles Industries – EUROCOTON;
- European Liaison Committee of Twine, Rope and Netting Industries – EUROCORD;
- European Carpet and Rug Association – ECRA;
- European Textile Services Association – ETSA
- FUR EUROPE

SUPPORTED BY GINETEX



GINETEX is the International Association for Textile care labelling and owns and oversees the use of the five care symbols that are used on billions of garments a year. Developed by GINETEX in the 1960's, the care symbols for textile are designed to be understood in all countries, irrespective of language. They give consumers and retailers information on how best to wash, dry or clean their clothes. Following the correct care labelling can help keep your clothes in the best shape possible. The GINETEX symbols are at the origin of the international standard EN ISO 3758 "Textiles – Care Labelling Code using Symbols", and are combined with the standard. GINETEX has been very active in ensuring that the symbols keep pace with technological changes in washing machines, tumble driers and the dry cleaning industry. Keeping the technical content as current as possible, whilst also maintaining simplicity in the symbols in order to translate to a global audience is a challenge that is met by GINETEX with ease.

GINETEX is convinced on the importance of the standardization and the harmonization of a textile care label standard for the benefit of the textile and clothing industries as well as of the consumers worldwide. Covering today almost all the European countries, North African countries, Brazil and Japan, the Association counts 22 national organisations as member representing all interest parties concerned with textile care and labelling, and responds to the need of thousands of companies' worldwide.

Through their membership, GINETEX licensees access to the use of the five symbol trademark as well as a full range of services including legal and regulation information

The care symbols on a garment provide information on the most severe treatment allowable, one that does not cause irreversible damage to the article during the care process. Milder treatments and lower temperatures than indicated on the label are always allowed, if there is no text saying to follow the given temperatures.



on textile care labelling to help them selling their textile products worldwide.

Consumers all over the world know well the GINETEX symbols and even search and rely on them when they purchase textile products.

GINETEX will launch its new worldwide website soon

Towards a new look and a dynamic representation of its activities, GINETEX will soon publish a new international website which will become the worldwide reference platform of textile care labelling delivering information on membership, care labelling symbols, legal & regulatory updates, sustainable textile care, partnerships, and access to market research results, GINETEX newsletter, video, etc.



European market research on textile care labelling

With the French market research institute IPSOS, GINETEX evaluated the European consumer behaviour in relation with the textile care labels, the care symbols and their view on sustainable care. This research (Dec. 16) will consolidate the results of six European countries: Germany, UK, France, Italy, Czech Republic and Sweden - representing 6000 European consumers in total. The results of this first GINETEX barometer "The European and the textile laundry care labels" will be published soon on line.

The GINETEX logo for extending the life of textile and reduce climate impact

GINETEX developed an internationally applicable logo for sustainable care, called clevercare.info®, to advise consumers that they can influence the environmental impacts of garment care and by carefully following the care symbols that can be found on a textile label – www.clevercare.info. The biggest opportunity for consumers to reduce the carbon footprint of clothing is to change the way they care for their clothing and textile in general. Laundry alone accounts for around 25% of the carbon footprint of clothing. Fully aware of this market trend, GINETEX licensees are starting to implement this logo on their care labels and develop consumer communication worldwide. Two GINETEX communication tools will be available on line on its new website. A consumer information platform www.clevercare.info is offering tips and advices on the best low-impact care practices (18 languages).



All GINETEX licensees can use the clevercare logo for free by contacting GINETEX.

GINETEX app

The GINETEX App gives information on all the textile care symbols and the clevercare.info logo. The download of the app is free of charge – just scan the given QR-code or download it via Play Store or App Store. The app language is selected on the basis of the smartphone settings or in English. The app reads the QR-code on labels giving the care information relevant to the textile article. Companies may generate QR-codes and promote its own brand via banner advertisement on the app (for more information, <http://moma-wv.com>).



Deposit and registered trademarks, property of GINETEX - The combination of the five basic care symbols used is covered by international trademarks which are registered with the WIPO. Any use or reproduction of the symbols requires the authorization of GINETEX or one of its national member organisations. The trademark helps to ensure a worldwide coordination and recognition of the ISO 3758:2012 care labelling system.



www.ginetex.net

INFOGRAPHICS

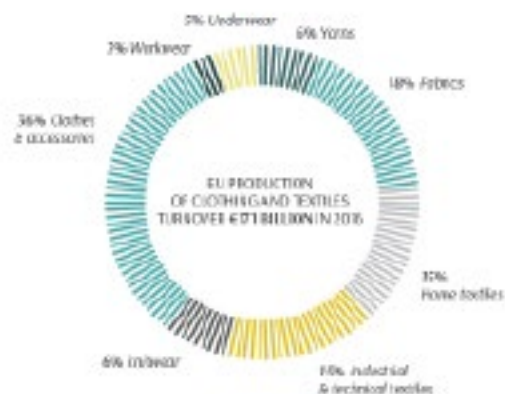
The EU is the 2nd world exporter of textiles and fashion goods

LONG TRADITION & INNOVATIVE SOLUTIONS

The strength of our industry is that each step of the value chain - from fibre through fabric to ready-to-use product, is present in the EU.

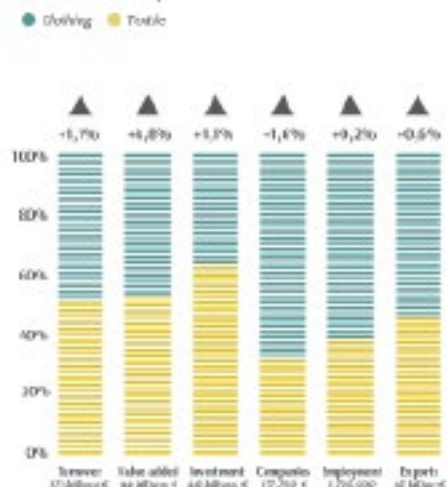


INDUSTRY AT A GLANCE



SOURCE: EUROSTAT BASED ON EUROSTAT

Upward trends of textile & clothing sector in Europe



EU IS A TOP MARKET FOR TEXTILES & FASHION DUE TO A HIGH RATE OF CONSUMPTION PER CAPITA

How much do Europeans spend for their clothes per year?



RANKING BY MEMBER STATES (€/INHABITANT)
SOURCE: EUROSTAT

TOP 10 EU PRODUCERS OF FASHION AND TEXTILE GOODS



INFOGRAPHICS

SMALL COMPANIES - BIG IDEAS

Small and medium enterprises are at the core of the industry, representing 69% of the 177,706 companies. These companies directly employ 17 million workers

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



SOURCE: EUROSTAT



Until 2025, nearly 600,000 job openings are anticipated in the textile and fashion sector in the EU

TALENTED SKILLED EMPLOYEES ARE CRUCIAL FOR OUR SECTOR



EUROPEAN SECTOR SKILLS COUNCIL, TEXTILE CLOTHING LEATHER FOOTWEAR, REPORT 2014