2026
EDITION

FACTS & KEY FIGURES

OF THE EUROPEAN TEXTILE AND CLOTHING INDUSTRY

EURATEX
30 YEARS

CONTENTS

EURATEX | THE VOICE OF THE EUROPEAN TEXTILE AND APPAREL INDUSTRY

CONTENTS

EURATEX | THE VOICE OF THE EUROPEAN TEXTILE AND APPAREL INDUSTRY

FOREWORD

EURATEX | THE VOICE OF THE EUROPEAN TEXTILE AND APPAREL INDUSTRY

The European textile and clothing industry stands at a defining moment. With €166 billion in annual turnover, 1.2 million jobs, and nearly 200,000 companies across the EU-27, our sector remains one of Europe's most vital industrial ecosystems - a source of innovation, employment and cultural identity that reaches far beyond fashion into transport, healthcare, construction, agriculture, defence, etc...

Yet the numbers in this 2026 edition tell a more complex story. Exports have declined 2.9%, employment has fallen 2.8%, and the trade deficit with third countries continues to widen. Imports now stand at €122 billion - more than double our export figure of €61 billion - and around one third of all textile and clothing products sold in European markets are manufactured in China. Meanwhile, e-commerce volumes of low-value parcels have quadrupled since 2022, with average import prices of less than €9 per item, placing enormous pressure on producers who uphold our high European standards.

At the same time, this report is a testament to resilience and reinvention. Our industry has achieved sustained productivity gains year after year. CO_2 emission intensity has fallen dramatically - from above 160 grams per euro of value added in 2008 to just 66 grams in 2024 - demonstrating that competitiveness and sustainability can go hand in hand. From textile-reinforced concrete bridges to fog-harvesting meshes, from aerospace composites to implantable medical scaffolds, European textile innovation is quietly shaping the world around us.

The political context of early 2026 offers both urgency and opportunity. The Antwerp Declaration has placed industrial competitiveness squarely at the top of Europe's agenda. EURATEX welcomes this shift, and we intend to ensure that the textile and clothing sector - representing the full breadth of our membership across the EU and beyond - has a clear voice in the decisions that follow. We advocate for affordable energy, free but fair trade, a regulatory environment that rewards sustainable performance rather than merely multiplying compliance burdens, and a "Made in Europe" strategy built on transparency and quality rather than protectionism.

The green and digital transitions remain central challenges. Only 20% of companies in our ecosystem currently achieve a high digital intensity rating. Building a viable textile-to-textile recycling system by 2035 will require between €8 and €11 billion in capital investment alone. These are ambitious targets - but they are achievable, provided that public policy and private initiative move in the same direction, and that our industry is treated as the strategic asset it truly is.

We hope that this edition of Facts & Key Figures serves as both a reliable reference and a call to action for our members, our partners, and our policymakers alike.

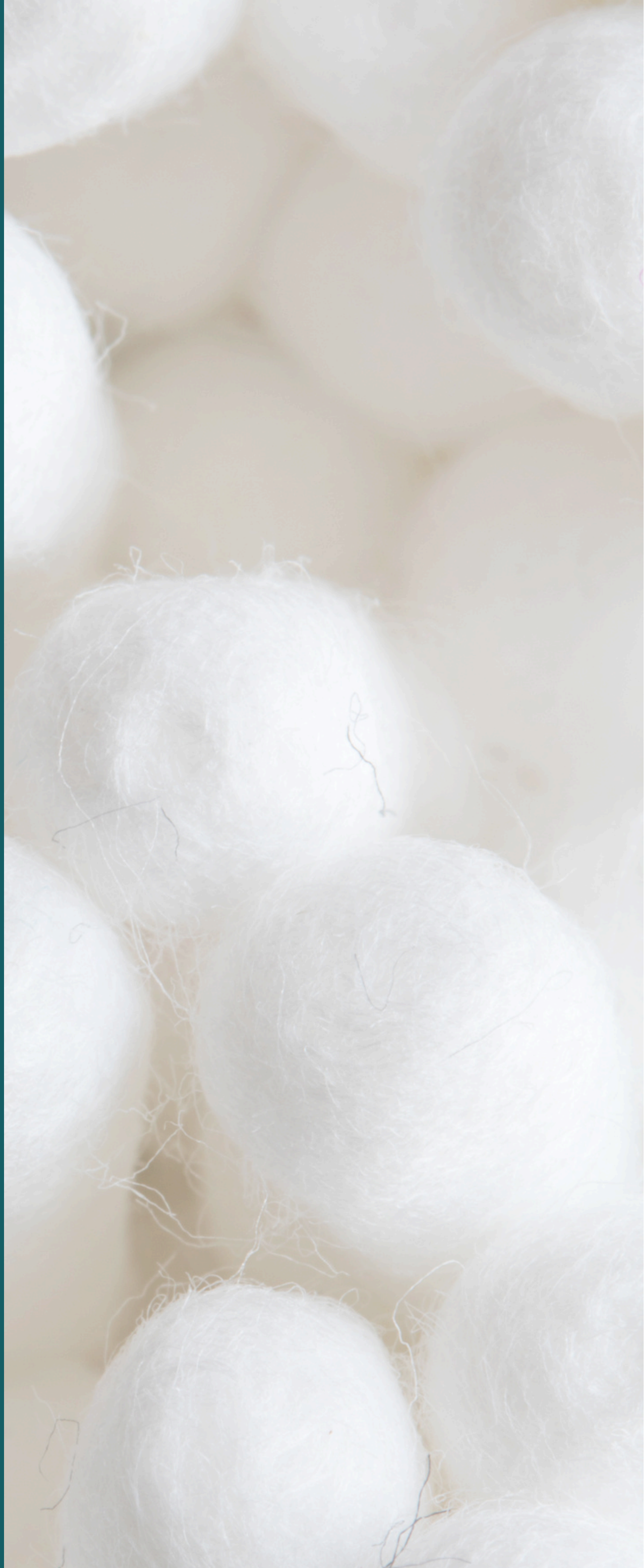
Dirk Vantyghem
Director General

Mario Jorge Machado
President

EURATEX

KEY FIGURES

OF THE TEXTILE & CLOTHING INDUSTRY



EURATEX 30 YEARS

Key Figures

EU27 MEMBER STATES

Textile & Clothing sector
2025 (estimates)

EXPORTS
-2.9%

61
BILLION €

TURNOVER
-1.5%

166
BILLION €

COMPANIES*

194
THOUSAND

IMPORTS
+1.1%

122
BILLION €

EMPLOYMENT
-2.8%

1.2
MILLION

INVESTMENTS*

5.3
BILLION €

Turnover and employment: estimates.
Imports and exports: extra-EU trade.
*Companies and investments in tangible assets: 2024 data

Source: EURATEX calculations, based on EUROSTAT data

Key Figures

EURATEX MEMBERSHIP

EU COUNTRIES, MOLDOVA, NORWAY, SERBIA, SWITZERLAND, TÜRKIYE, UKRAINE, AND THE UNITED KINGDOM

Textile & Clothing sector
2024 data

TURNOVER	COMPANIES	EMPLOYMENT
258 BILLION €	**268** THOUSAND	**2.4** MILLION

NON-EU COUNTRIES BREAKDOWN

Indicator	Unit	Norway	Switz.	Serbia	Türkiye	UK	Ukraine	Moldova
Turnover	*billions €*	1.0	2.4	1.5	72.2	10.1	1.5	0.3
Companies	*thousands*	1.8	0.5	1.3	59.1	8.4	1.9	0.5
Employment	*thousands*	4.9	9.6	43.9	959.4	75.1	49.3	17.5

Türkiye is a critical industrial partner
for the EU, acting as a top trade partner (4th largest in 2025). With 60,000 companies and almost 1 million workers, it serves as a major manufacturing hub for the EU textile & clothing sector.

Source: EURATEX calculations, based on EUROSTAT data Source: Eurostat and Staistical National Institutes

PROFILE

THE TEXTILE MANUFACTURING PROCESS

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

1 6%

FIBRES

Including:
- Natural or man-made
- Staple or continuous filament

SPINNING

2 5%

YARNS

Including:
- Spun
- Filament

WEAVING, KNITTING OR OTHER METHOD

3 14%

FABRICS

Including:
- Woven
- Knitted
- Or other type of fabric construction

DYEING AND / OR PRINTING FABRIC FINISHING

4 75%

FINISHED TEXTILES & CLOTHING

MANUFACTURING

FASHION & CLOTHING (42%)

for example:
underwear, shirts, suits, dresses, coats

FURNISHING & HOME (14%)

for example:
curtains, upholstery, carpets, bed linen

INDUSTRIAL & TECHNICAL (19%)

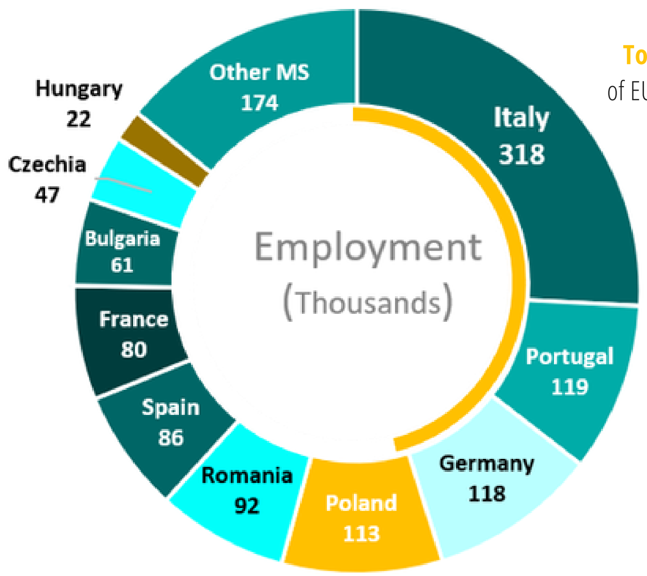
for example:
ropes and nettings, parachutes, medical textiles, synthetic grass, sunblinds, smart textiles

Source: EURATEX

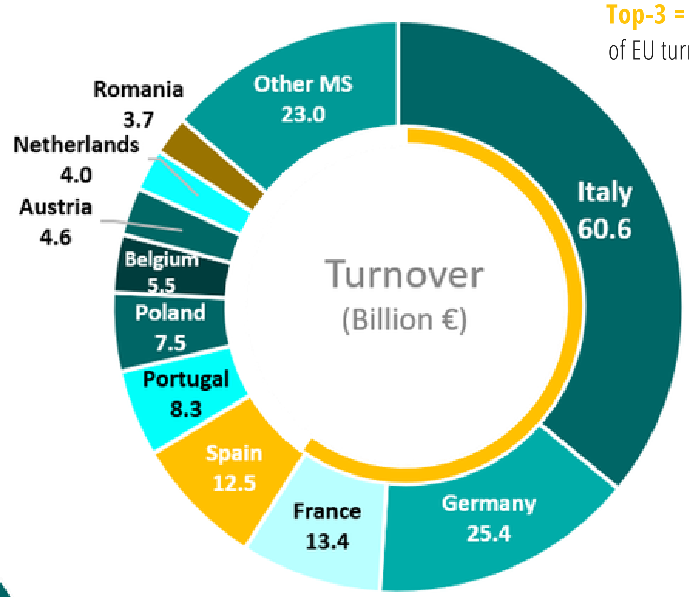
PROFILE

MEMBER STATES SHARE IN TOTAL EU

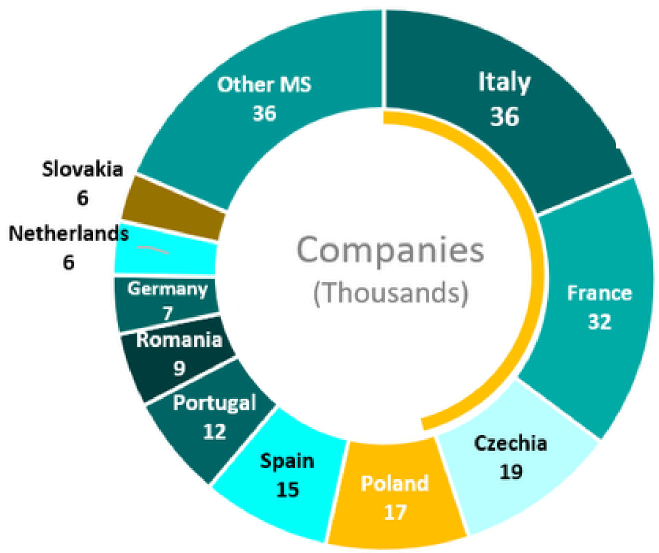
ITALY IS THE LARGEST CONTRIBUTOR TO THE TEXTILE AND CLOTHING INDUSTRY IN THE EU



Top-3 = 46%
of EU employment



Top-3 = 60%
of EU turnover



Top-3 = 45%
of EU companies

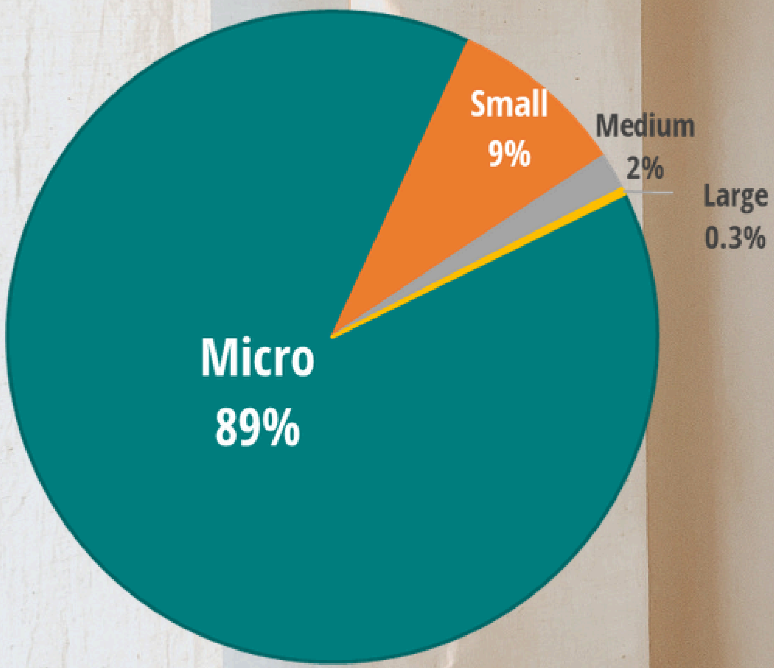
Period: 2024 data
Source: EURATEX calculations, based on EUROSTAT data

COMPANIES IN THE T&C INDUSTRY

SMALL AND MICRO SIZED ENTERPRISES ARE AT THE CORE OF THE INDUSTRY

Size of companies[1]

% share



99.7 %

of total companies in T&C industry are MICRO AND SMEs' enterprises.

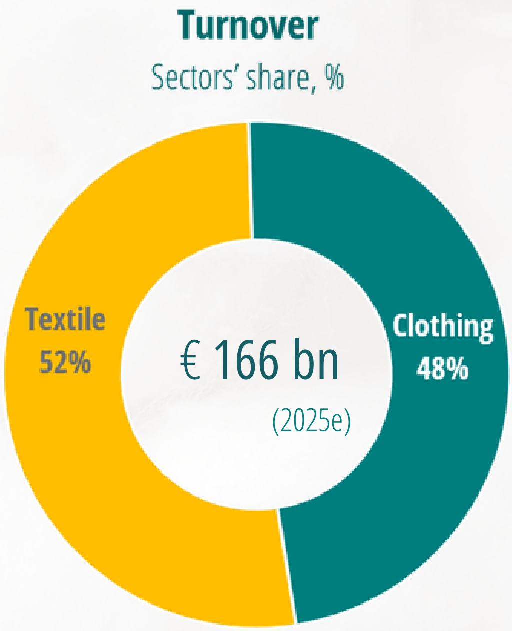
'Size by number of persons employed
Micro: from 0 to 9
Small: from 10 to 49
Medium: from 50 to 249
Large: 250 or more.

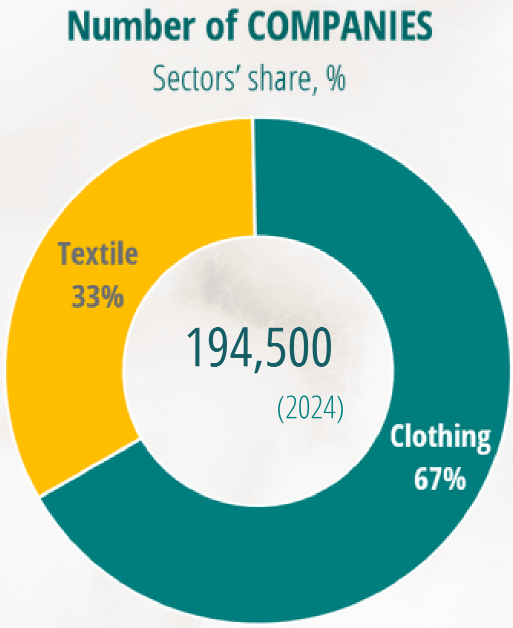
Unless specified, EU refers to EU27
Source: EURATEX calculations, based on EUROSTAT data

PROFILE

TURNOVER AND COMPANIES

BY SUB-SECTOR



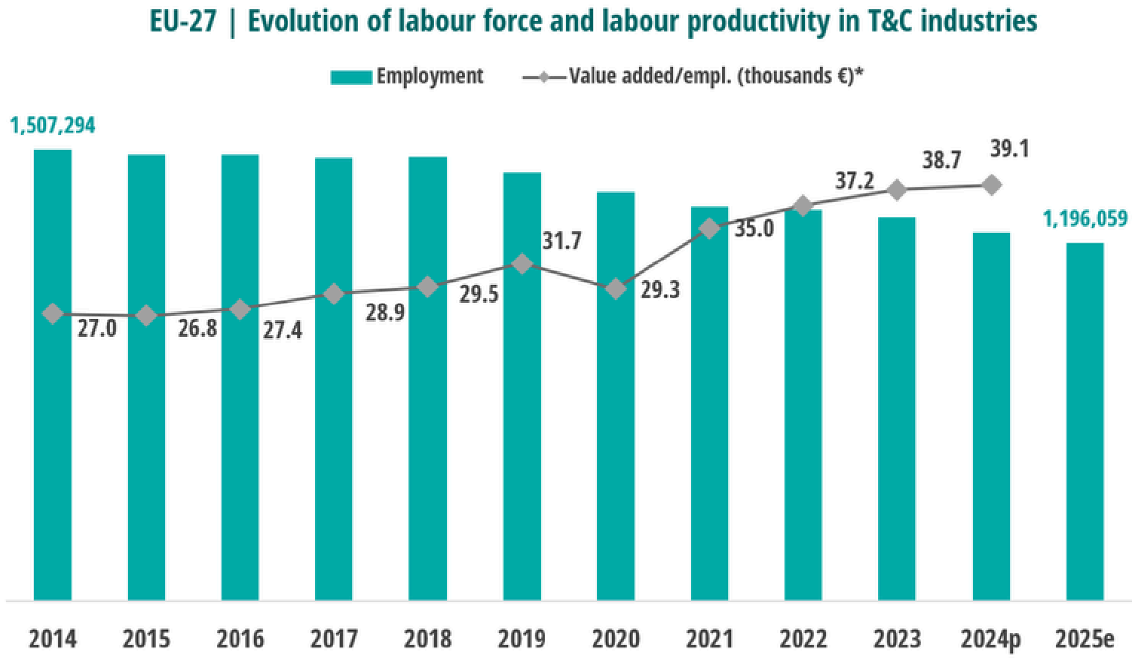


Unless specified, EU refers to EU27.
Source: EURATEX calculations, based on EUROSTAT data

PROFILE

EMPLOYMENT AND PRODUCTIVITY PER EMPLOYEE

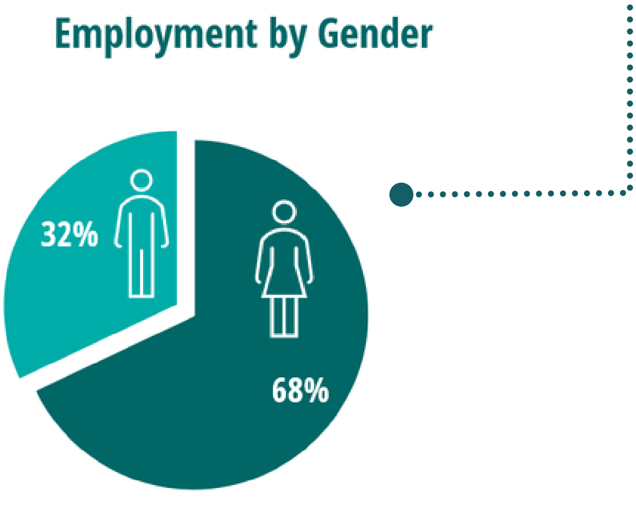
THE EU T&C INDUSTRY HAS **ACHIEVED CONSIDERABLE GAINS IN PRODUCTIVITY** PER EMPLOYEE OVER THE YEARS



Women represent almost

70%

of all employees in the sector.



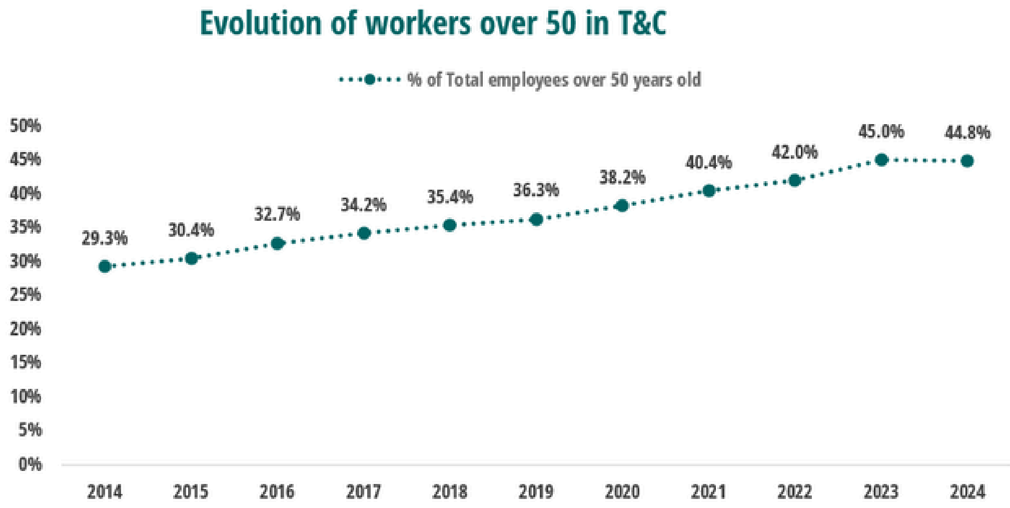
*Value-added/employee : 2025 not available

Source: EURATEX calculations, based on EUROSTAT data.

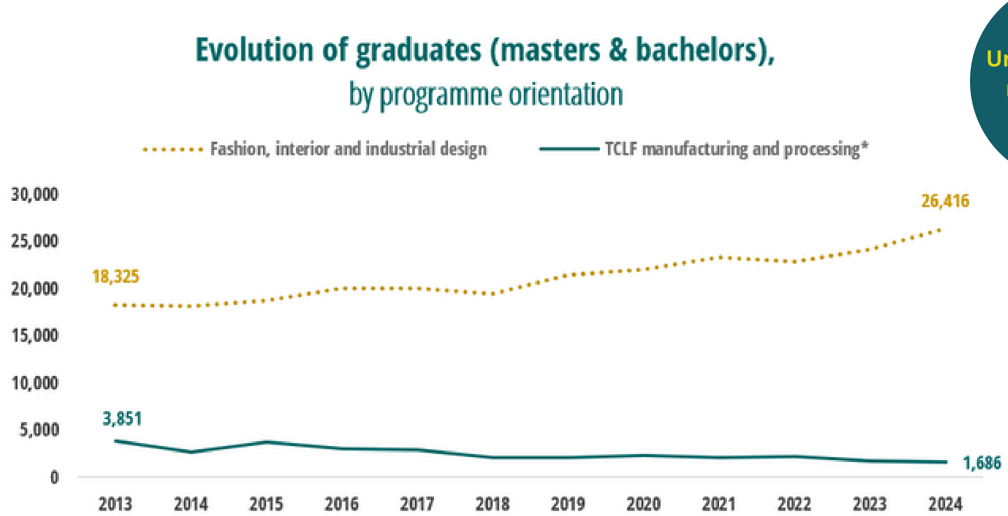
PROFILE

EMPLOYMENT AND EDUCATION

AGEING: AN ADDITIONAL OPPORTUNITY FOR ENTERPRISES TO CREATE NEW JOBS



Urgent need for more textile engineers!



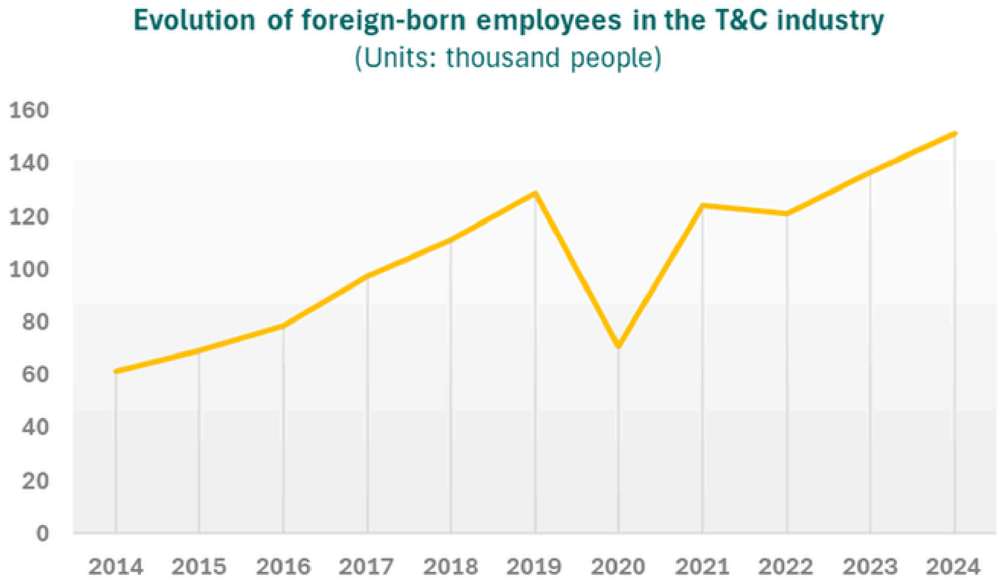
*** Programmes and qualifications with the following main content are classified here:** Clothing trades; Dressmaking; Footwear making; Fur making; Garment production; Leather processing; Saddlery; Shoemaking; Skins and leather production; Spinning; Tailoring; Textile trades; Upholstery; Weaving (industrial); Wool science

Source: EURATEX calculations, based on EUROSTAT data

PROFILE

EMPLOYMENT AND COUNTRY OF BIRTH

ECONOMIC MIGRATION HAS BEEN CRUCIAL TO THE EUROPEAN TEXTILE INDUSTRY, PROVIDING A FLEXIBLE AND SKILLED LABOR FORCE THAT HAS SUPPORTED ITS GROWTH, COMPETITIVENESS, AND ABILITY TO ADAPT TO CHANGING GLOBAL MARKET DEMANDS.



Despite significant increases in the number of employees born outside the EU27, their **relative share in the total employment** remains small compared to the EU27-born workforce:

11.6%

Source: EUROSTAT EU Labor Force Survey

EURATEX 30 YEARS

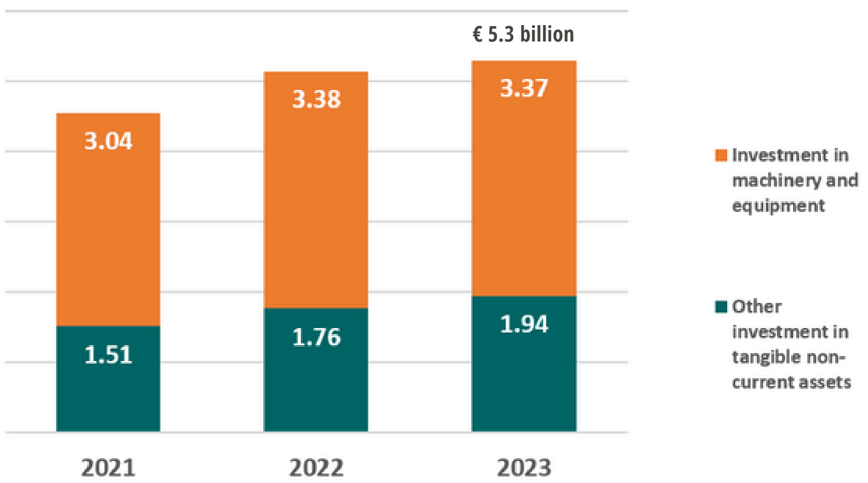
PROFILE

INVESTMENTS

TANGIBLE INVESTMENTS IN THE TEXTILE AND CLOTHING INDUSTRY ARE HEAVILY DRIVEN BY INVESTMENTS IN MACHINERY AND EQUIPMENT.

Textile and clothing sector attracts €5.3 Billion
in tangible investments,
with 63% done in
machinery and equipment

Tangible investments in the textile & clothing industry (billion €)



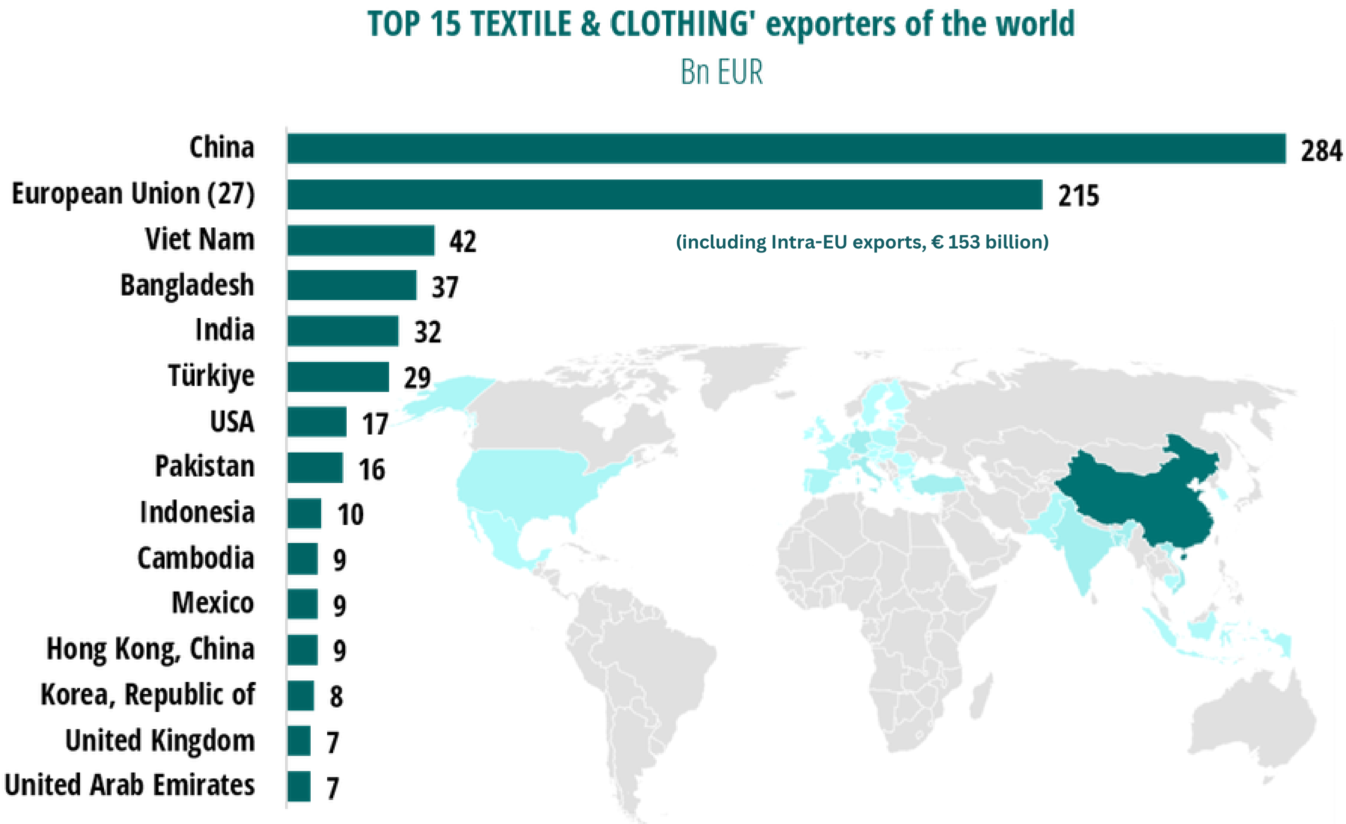
This capital expenditure is fundamental for modernization, increasing production speeds, improving quality, and adopting sustainable, energy-efficient processes.

Data based on EU27
Source: EUROSTAT

WORLD TRADE

WORLD EXPORTS OF TEXTILES AND CLOTHING

EUROPE IS THE WORLD'S 2ND EXPORTER IN OUR INDUSTRY

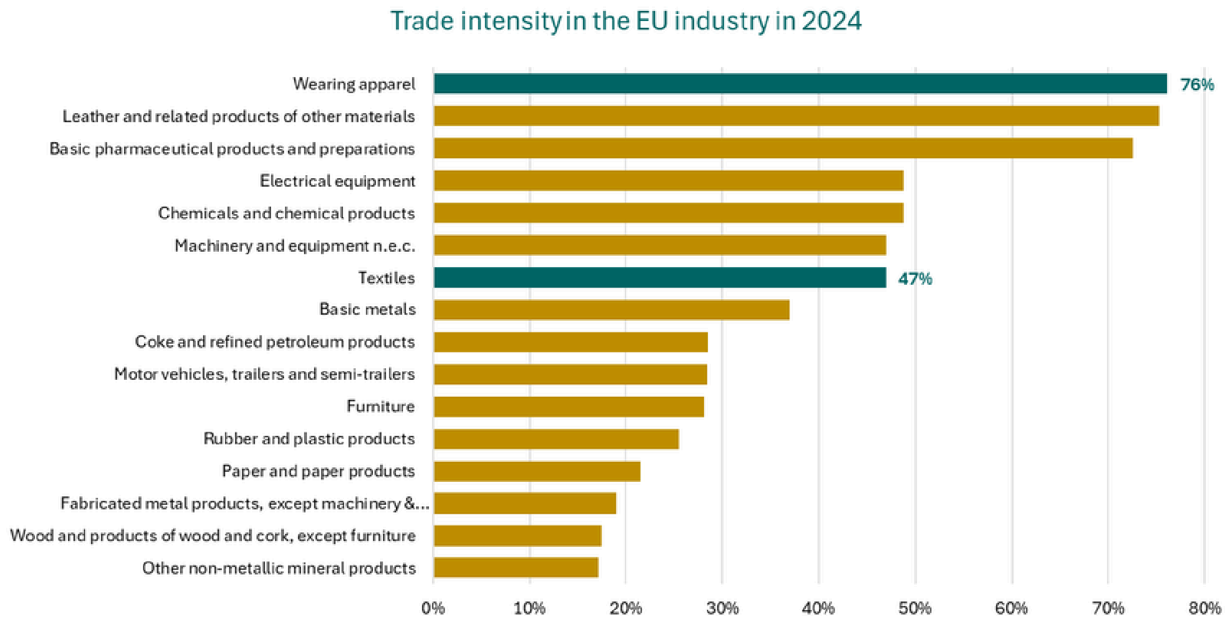


Data based on EU27
Source: WTO 2026, based on 2024 data

EU TRADE INTENSITY

COMPARISON ACROSS MANUFACTURING SECTORS

The EU textile and clothing sector is highly trade-intensive*, characterised by large volumes of imports and exports, strong exposure to global competition, and deeply internationalised value chains

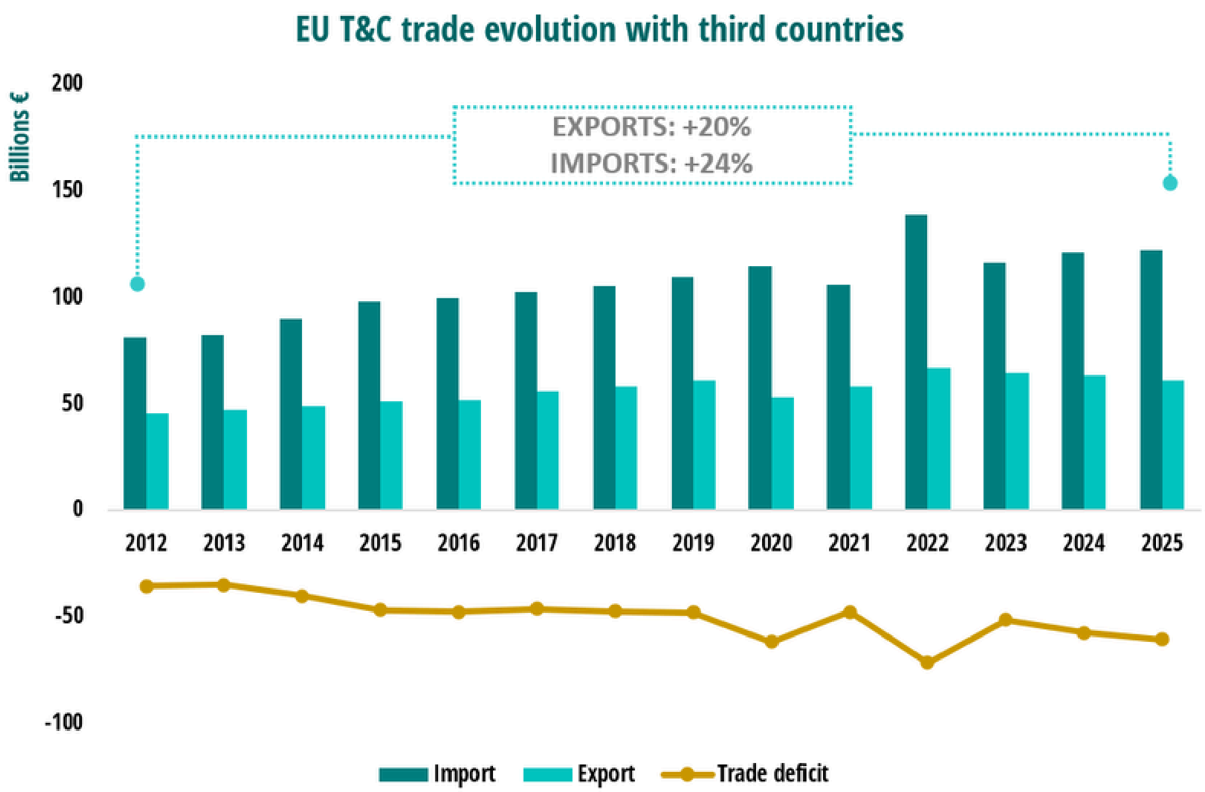


*** Trade Intensity** : defined as the ratio between the total value of exports to third countries plus the value of imports from third countries and the total market size (annual turnover plus total imports from third countries)

Data based on EU27
Source: EURATEX calculations, based on EUROSTAT data

EU TRADE : IMPORTS AND EXPORTS EVOLUTION

THE INDUSTRY REVENUE FROM FOREIGN MARKETS HAS SLOWED DOWN, DUE TO THE EMERGENCE OF TRADE BARRIERS, GEOPOLITICAL TENSIONS AND THE LOSS OF INTERNATIONAL COMPETITIVENESS RESULTING FROM HIGHER PRODUCTION COSTS



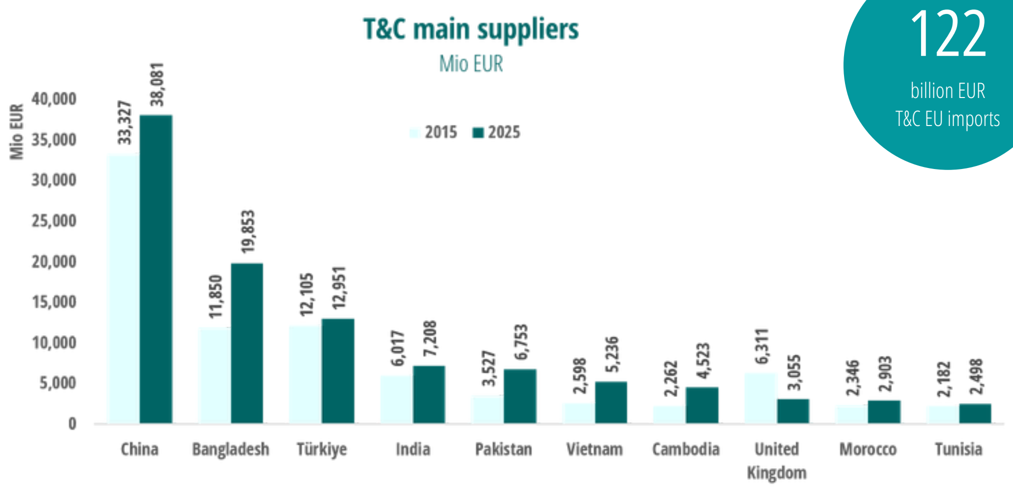
Unless specified, EU refers to EU27
Source: EURATEX, based on EUROSTAT/IHS

EU TRADE FLOWS BY MAIN PARTNERS

IN 2025, THE TOP 10 EU SUPPLIERS HAD A 85% SHARE IN TOTAL IMPORTS FROM THIRD COUNTRIES, AND THE TOP 10 EU CUSTOMERS ACCOUNTED FOR 66% OF THE TOTAL EXPORTS TO THIRD COUNTRIES.

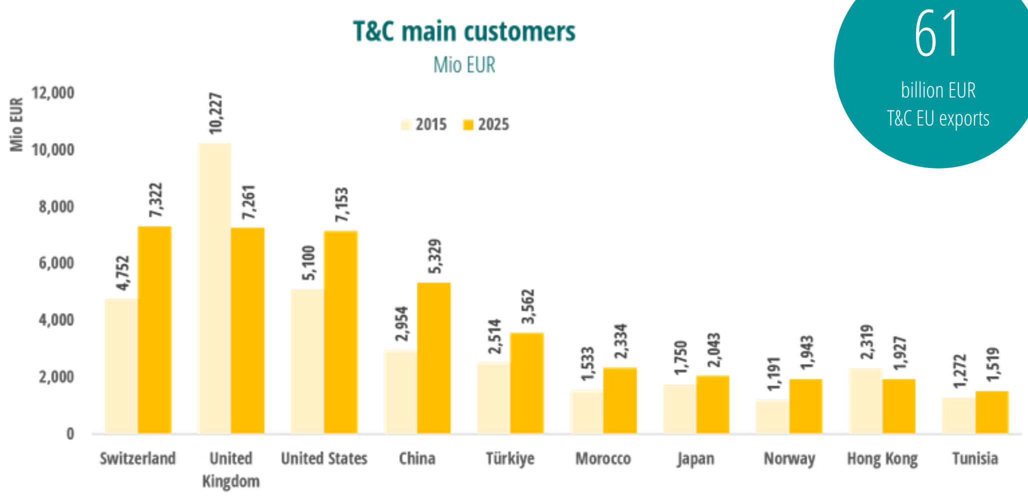
1/3 of T&C products sold to EU markets are made in China

122
billion EUR
T&C EU imports



Switzerland, the UK and the US are the EU main export markets

61
billion EUR
T&C EU exports



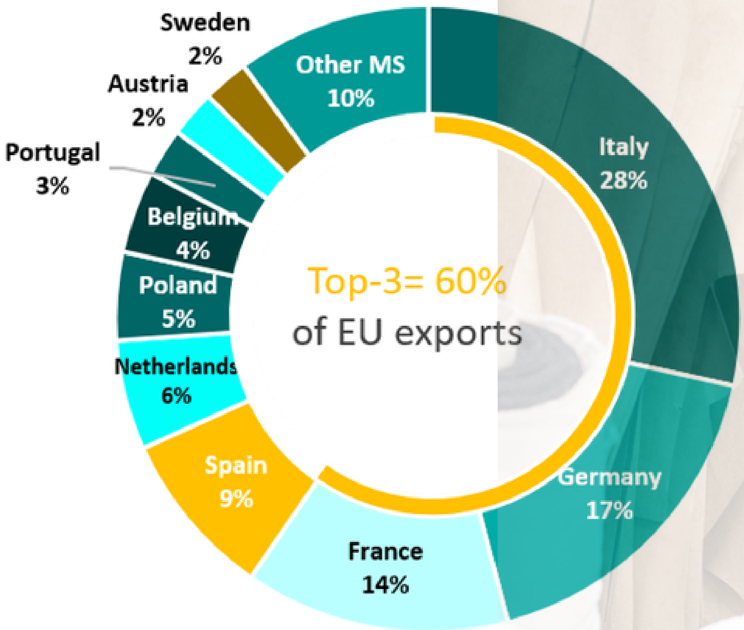
Unless specified, EU refers to EU27
Source: EURATEX, based on EUROSTAT / IHS

EU TRADE

EXPORTS BY EU MEMBER STATES

ITALY AND GERMANY ARE THE LEADING EXPORTERS IN THE EU-27, TOGETHER ACCOUNTING FOR 46% OF TOTAL EUROPEAN EXPORTS

Share of member states in EU-27 exports (%, 2025)



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

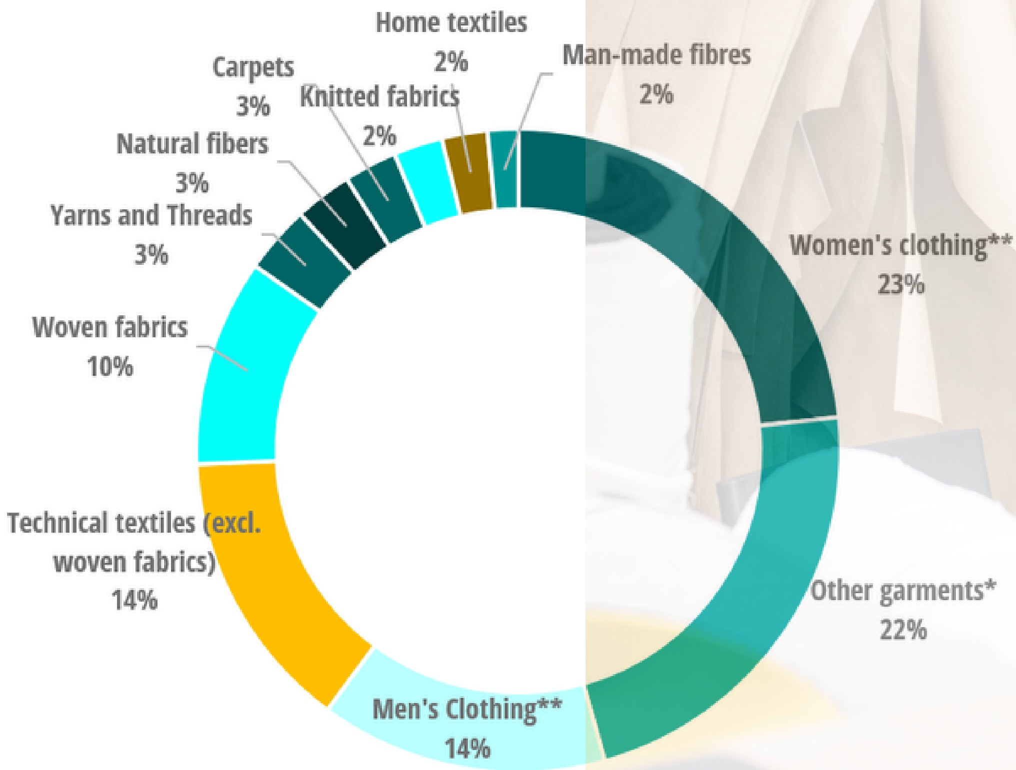
EU EXPORTS BY PRODUCT FAMILY

EXPORTS' GROWTH IN EUROPE HAS BEEN DRIVEN BY THE CLOTHING SUB-SEGMENT

European **clothing**

is the most attractive product category to customers worldwide.

Share of textile sub-sectors in EU exports (%, 2025)



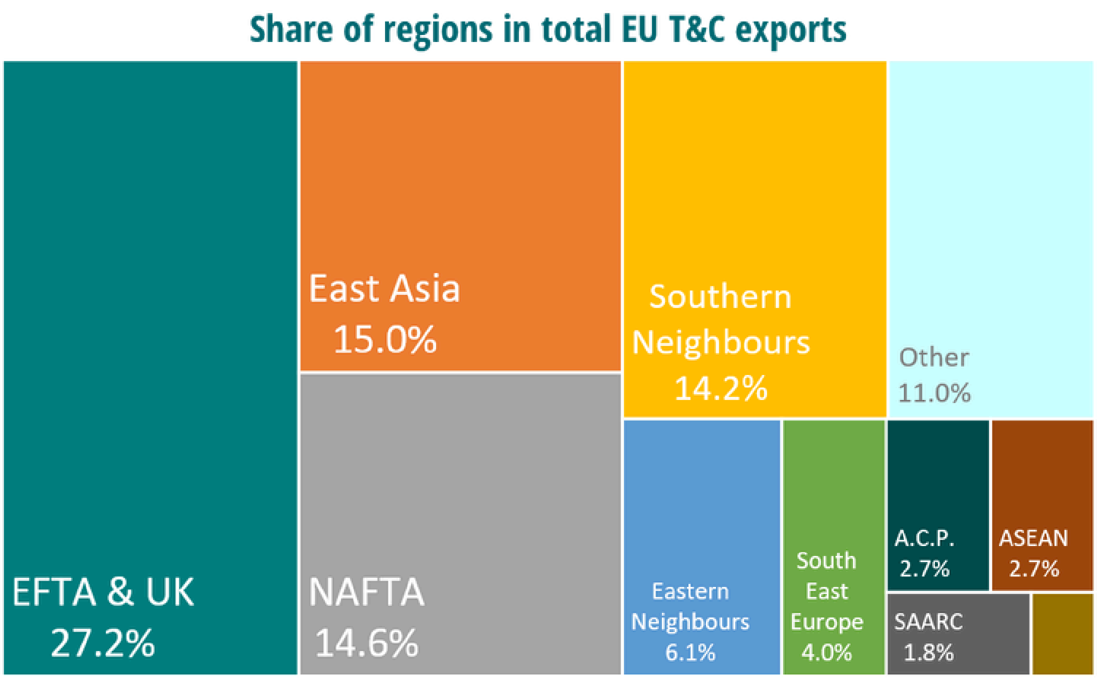
* Other garments (knitted and woven): babies' garment, T-shirts, pullovers, special garments, hosiery and clothing accessories.
** Clothing: including workwear.

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

EU TRADE

MAIN REGIONS AND EU PARTNERS

OTHER EUROPEAN COUNTRIES AND NEIGHBOURHOOD REGIONS ARE THE LARGEST TRADING PARTNERS OF THE EU-27.



LEGEND:

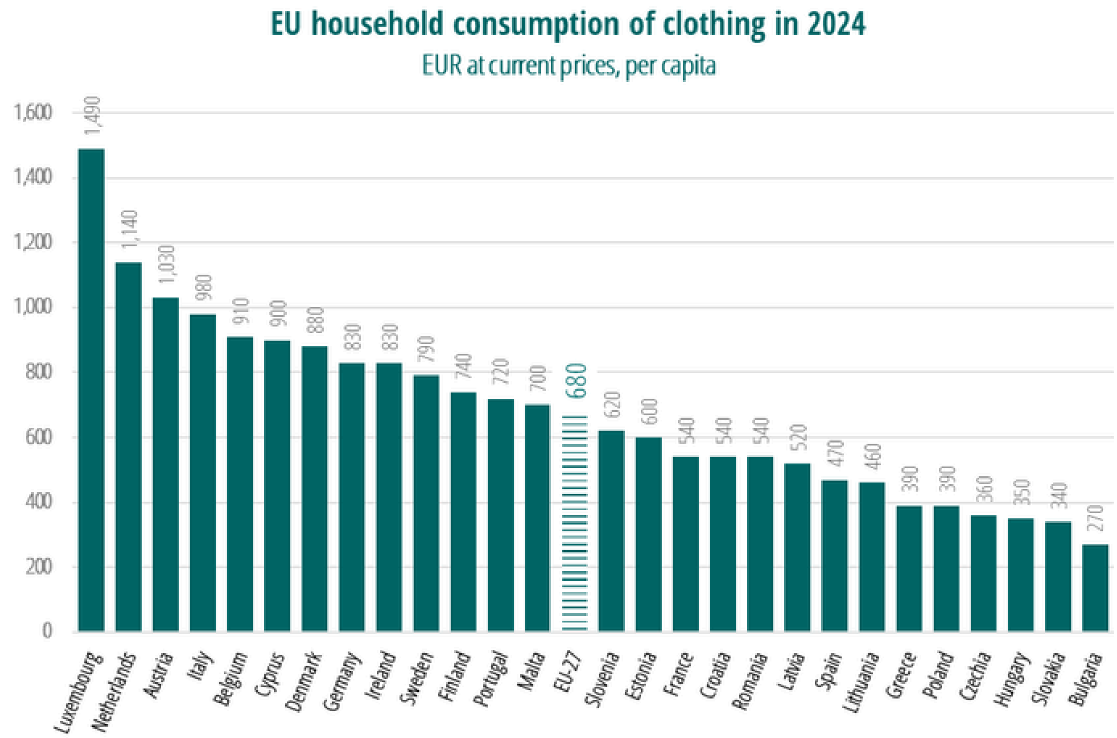
- **ACP**: Africa, Caribbean and Pacific countries.
- **ASEAN**: Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam.
- **East Asia:** Japan, South Korea, Taiwan, China.
- **Eastern Neighbours:** Armenia, Azerbaijan, Georgia, Belarus, Moldova, Ukraine, Russia.
- **EFTA & UK:** Iceland, Liechtenstein, Norway, Switzerland, UK.
- **MERCOSUR**: Argentina, Brazil, Paraguay, Uruguay.
- **NAFTA**: USA, Canada, Mexico.
- **SAARC**: Afghanistan, Bangladesh, Bhutan, India, Maldives, Nepal, Pakistan, Sri Lanka.
- **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

CONSUMPTION

HOUSEHOLD CONSUMPTION

EU IS A KEY MARKET FOR FASHION



In 2024, households in the European Union spent
€ 306 bn (or € 680 per citizen)
on clothing articles

Less than
13%*
of clothing items circulating on the EU market are manufactured within the EU*

* Euratex estimates : figure based on 2024 production, import and export data, in volume (pieces). It covers the main categories of clothing.
Source: EUROSTAT

EURATEX 30 YEARS

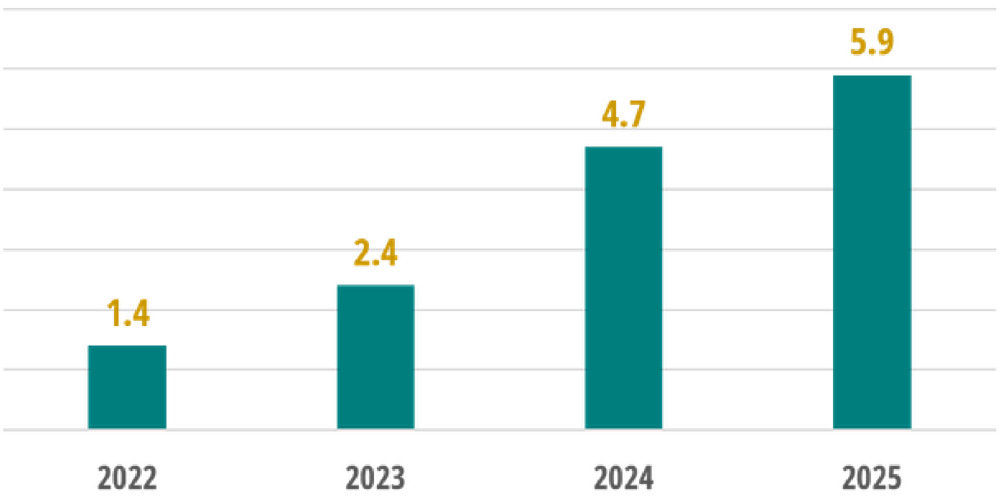
CONSUMPTION

E-COMMERCE

VOLUME OF E-COMMERCE GOODS DIRECTLY IMPORTED BY EU CONSUMERS

The volume of e-commerce goods directly imported by EU consumers has quadrupled since 2022

Low value items imported in the EU
(Number in Billion)



Low-value parcels

represent 98% of imported items but only 2% of the total import value, as the average price per item is less than 9 €

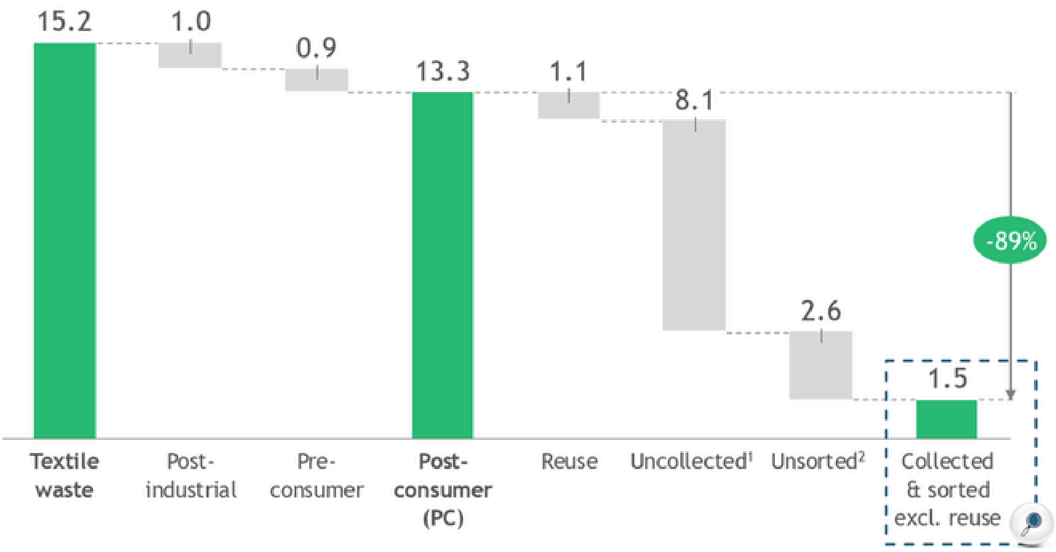
Unless specified, EU refers to EU27
Source: EU Surveillance data, European Commission

GREEN TRANSITION

TEXTILE WASTE FLOWS IN EUROPE

EUROPE GENERATES 13.3 MT OF POST-CONSUMER TEXTILE WASTE IN 2025, BUT ONLY ABOUT 1.5 MT ARE COLLECTED AND SORTED.

Textile waste in Europe in 2025 (in Mt)



1- **8.1Mt uncollected** means that 5.2Mt were collected
2- **2.6Mt unsorted** means that 2.6Mt were sorted out of the 5.2Mt collected

Source: "Advancing textile circularity", Boston Consulting Group x ReHubs, March 2026

GREEN TRANSITION

INVESTMENT NEEDS FOR RECYCLING

A VIABLE EUROPEAN TEXTILE-TO-TEXTILE SYSTEM REQUIRES MAJOR INVESTMENTS

CAPEX and OPEX levels required by stakeholder to launch the textile-to-textile ecosystem and reach 2.7 Mt recycled by 2035:

One-off[1]	Recurring every year[1]
€8 to €11 billion In CAPEX	**€5 to €6.5 billion** In OPEX

[1]Incremental CAPEX and OPEX required to bridge the gap between current (2025) collection, sorting, pre-processing and recycling rates to required levels in 2035.

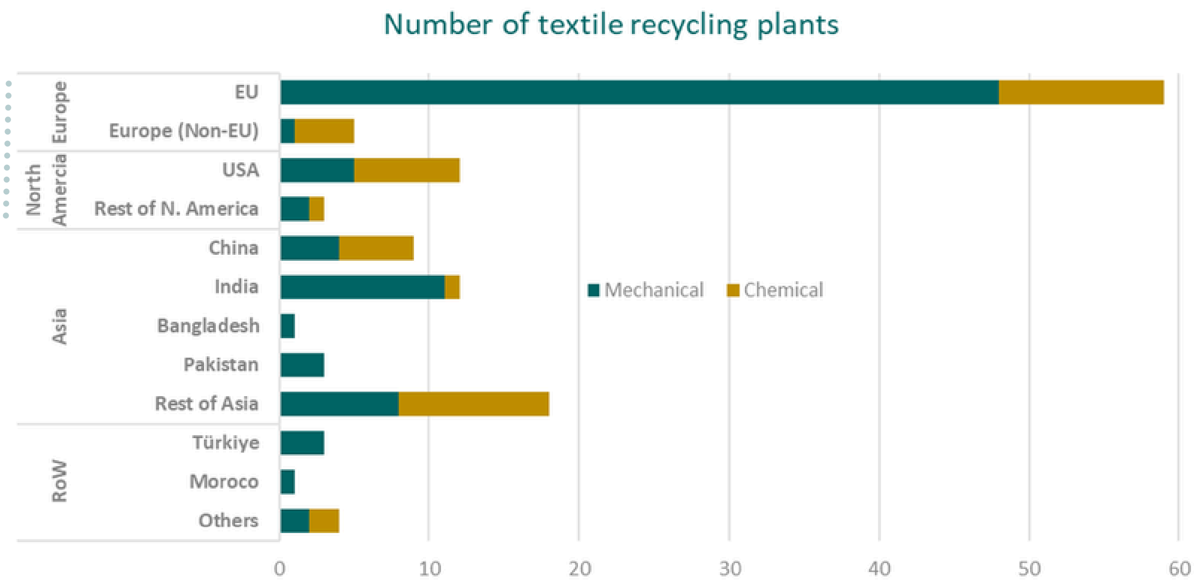
Source: "Advancing textile circularity", Boston Consulting Group x ReHubs, March 2026

GREEN TRANSITION

INUMBER OF RECYCLING PLANTS

THERE ARE CURRENTLY MORE TEXTILE RECYCLING PLANTS IN COUNTRIES THAT CONSUME THE MOST APPAREL

Europe and North America, which are the largest consumers, host about 50% and 11% of the global textile recycling plants, respectively

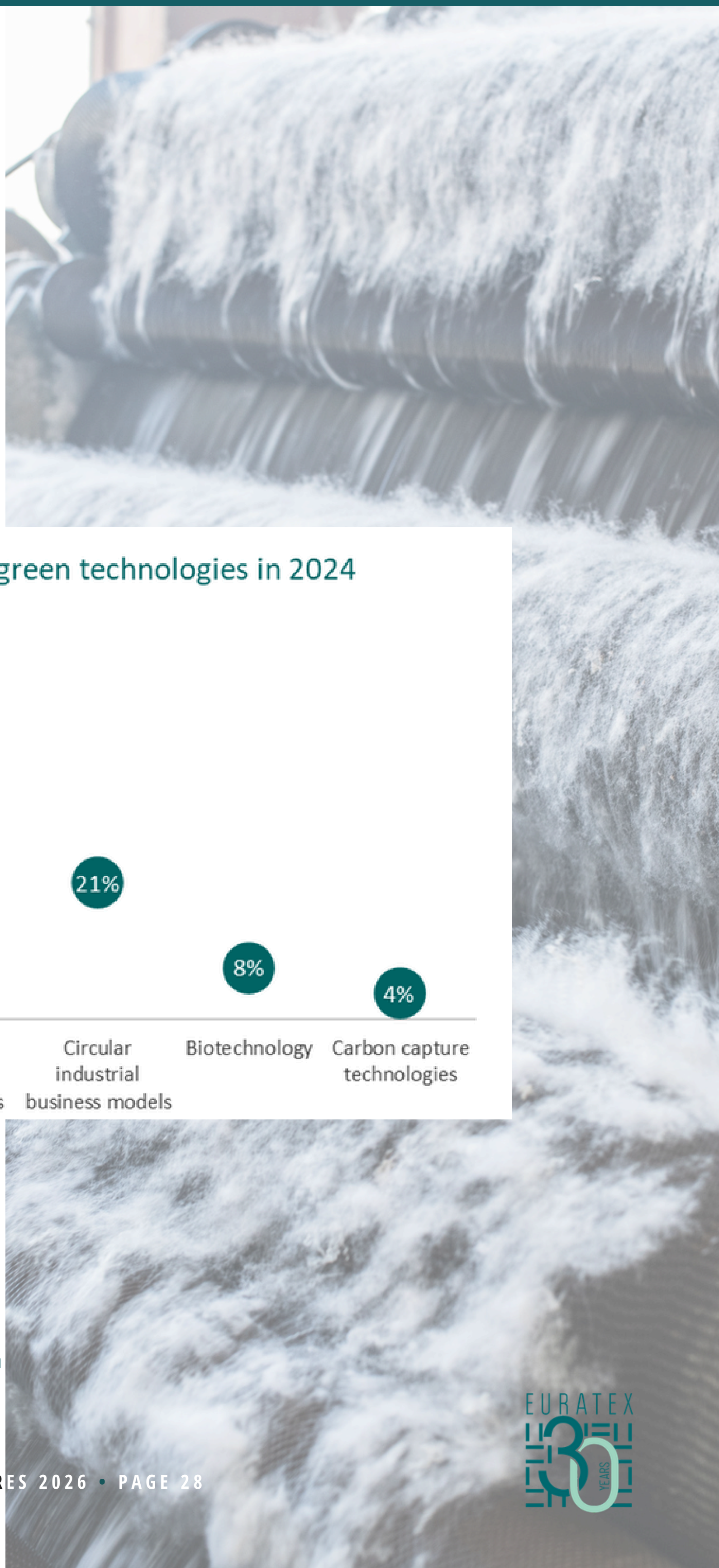


Source: JRC Working document of the 3rd milestone"Textile-Prep-Study", Dec.2025

GREEN TRANSITION

GREEN TECHNOLOGIES

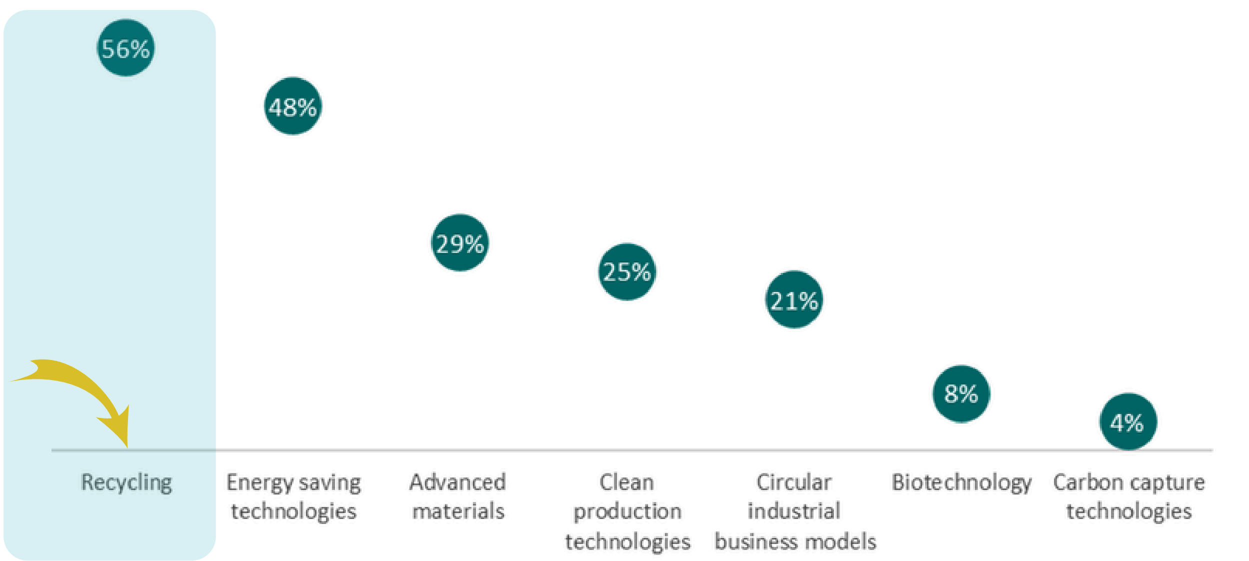
GREEN TRANSITION PLAYS AN IMPORTANT ROLE FOR BRANDING, REPUTATION AND COMPETITIVENESS.



Adoption of green technologies in the textile industry.

Companies in the textile ecosystem have been most active in the use of recycling technologies within their own operation

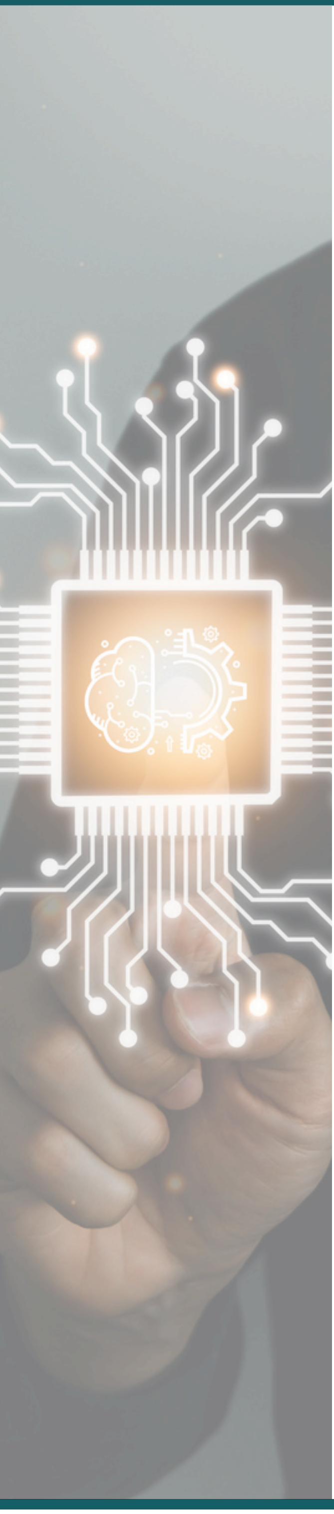
Share of companies in the EU adopting green technologies in 2024



Source: European Commission
"EMI Dashboard– "Monitoring the twin transition of industrial ecosystems" 2024

DIGITAL INTENSITY

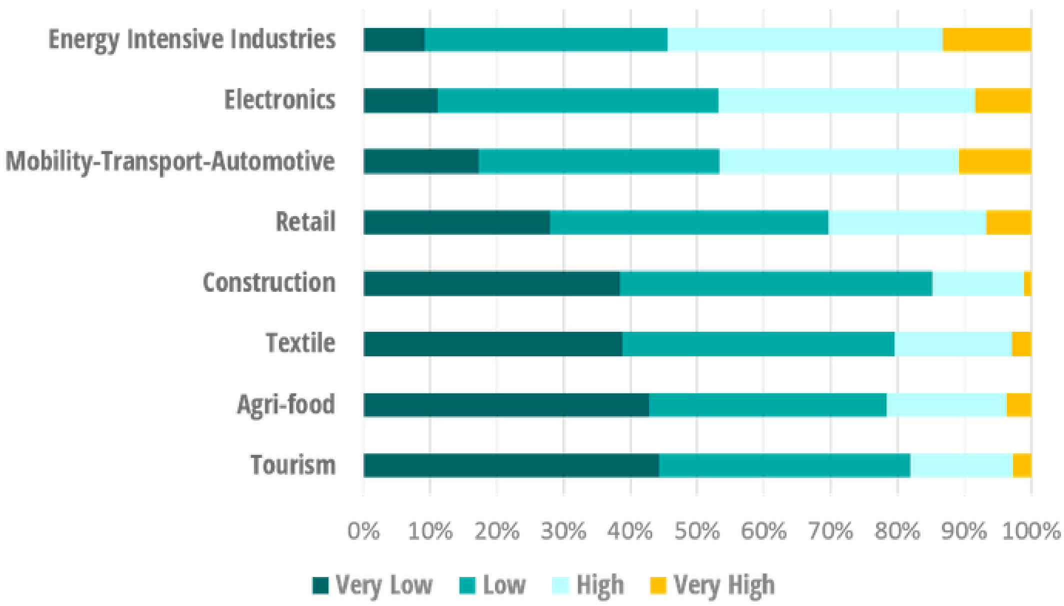
ONLY 20% OF COMPANIES IN THE TEXTILE ECOSYSTEM ARE ACHIEVING HIGH DIGITAL INTENSITY INDEX, CONFIRMING THE IMPORTANCE OF INCREASING INVESTMENTS IN DIGITAL TECHNOLOGIES



20%

of companies in the Textile Ecosystem are achieving high digital intensity index*

Share of companies achieving high digital intensity index*



* The digital intensity of businesses is monitored by the Eurostat digital intensity index (DII), which measures the use of 12 different digital technologies by businesses, for example using artificial intelligence or making e-sales.

Source: EMI Report on textiles – "Monitoring the twin transition of industrial ecosystems", 2024

ECOSYSTEX COMMUNITY

EU-funded member projects

Over the last 5 years, around

€500 million

in EU funding[1] has been made available for textile innovation, upskilling, and for the green and digital transition.

- Completed projects
- Ongoing projects ending in 2026
- Ongoing projects ending after 2026

Source: European Technology Platform

EURATEX 30 YEARS

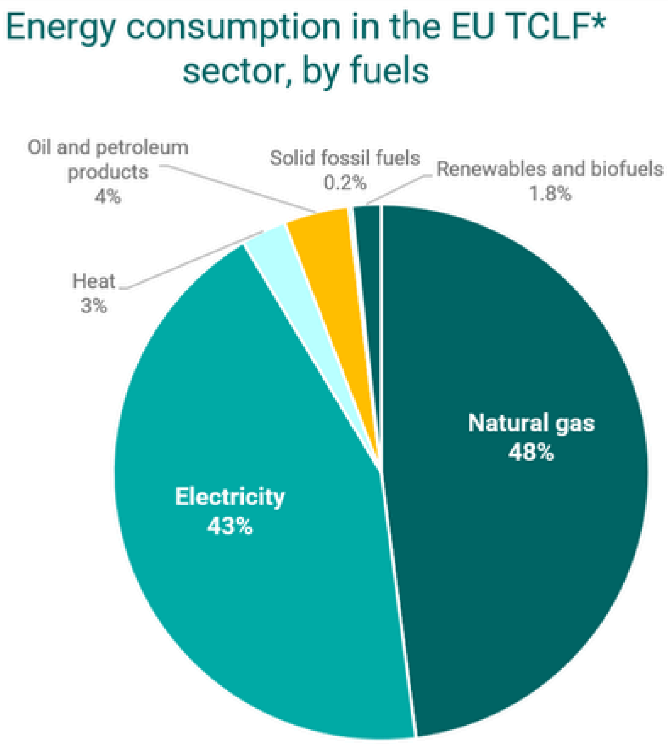
ENVIRONMENT

ENERGY CONSUMPTION

GREEN TRANSITION REQUIRES CONSIDERABLE INNOVATION AND INVESTMENT

Natural gas and electricity

are the main energy source for the EU industry.



* TLCF: Textile, clothing, leather and footwear
Source: EUROSTAT

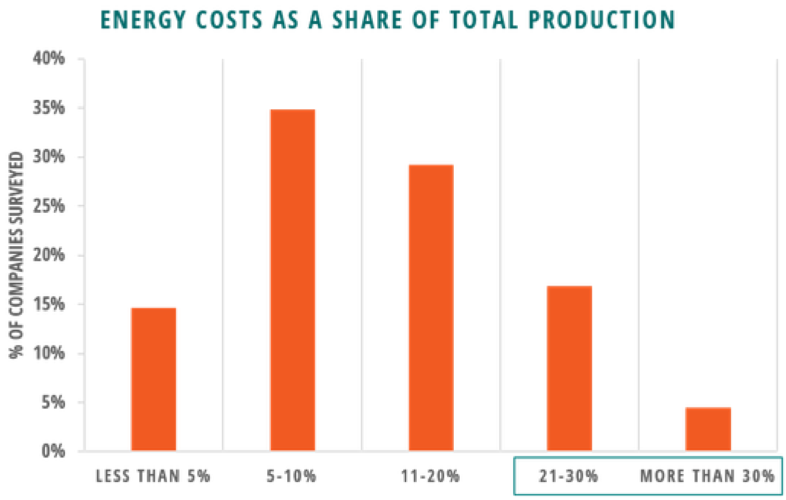
ENVIRONMENT

ENERGY COSTS

THE EU TEXTILE INDUSTRY FACES COMPARATIVELY HIGH ENERGY COSTS, WITH ENERGY EXPENDITURES ACCOUNTING FOR A SIGNIFICANT SHARE OF TOTAL PRODUCTION COSTS, THEREBY REDUCING INTERNATIONAL COST COMPETITIVENESS.

21% of companies surveyed report energy costs exceeding 20% of total production costs

in the textile sector, with smaller companies exhibiting a higher energy cost share



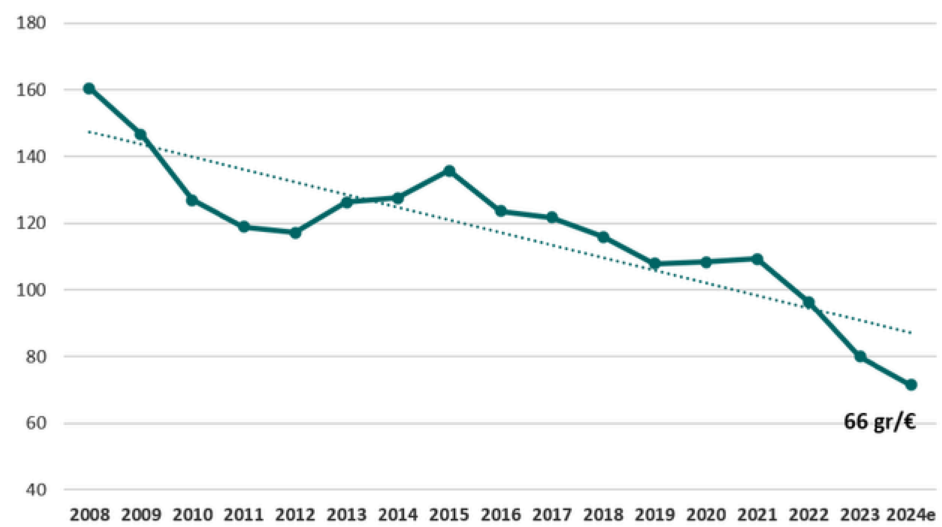
Source: EURATEX 2025 Survey

ENVIRONMENT

AIR EMISSION CO2

OUTSTANDING IN ENERGY EFFICIENCY: EVERY YEAR THE INDUSTRY USES LESS ENERGY, HENCE LESS CO2, WHILE INCREASING THE VALUE ADDED

Evolution of the CO2 emission intensity in the TCLF sectors*
2008-2024 (unit: Grams/€)



* TLCF: Textile, clothing, leather and footwear

Energy efficiency is of critical importance for the textile and clothing industry and to reduce CO2 emissions.

Unless specified, EU refers to EU27
Source: EUROSTAT

TEXTILES ARE EVERYWHERE

TECHNICAL AND INDUSTRIAL TEXTILES

FOR MOBILITY, CONSTRUCTION, ENERGY, SPORT, LEISURE, AGRICULTURE, HEALTHCARE, DEFENCE...

TEXTILES ARE EVERYWHERE

TEXTILE-REINFORCED CONCRETE

Engineers replaced rebar with carbon textile grids.

Concrete handles compression, while the textile reinforcement resists tension and controls cracking, without needing thick protective cover against rust.

The world's first fully steel-free, carbon-reinforced pedestrian bridge (Ebingen).

The 15-meter edifice needs only 15 mm of concrete cover.

~50% lower primary energy and about 30% lower CO_2.

* Source: Solidian Kelteks / Knippershelbig

TEXTILES ARE EVERYWHERE

TURNING FOG INTO DRINKING WATER

In wind-swept fog belts, vertically hung textile meshes capture tiny droplets as fog flows through, which then merge on the fibers and drip into a gutter.

A single 24 m² collector produces roughly 528 liters on foggy days and can withstand winds up to about 120 km/h, providing certified quality water to rural communities and freeing locals from hours of daily water collection.

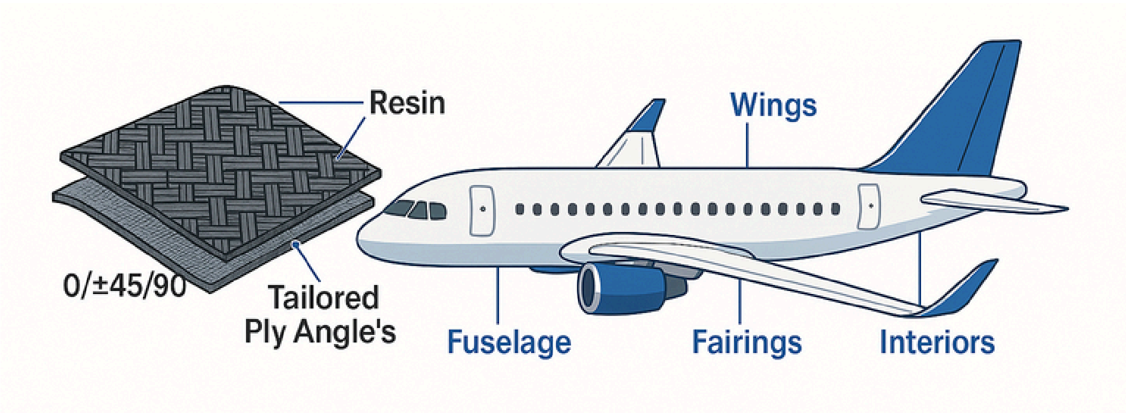
* Source: Aqualonis

TEXTILES ARE EVERYWHERE

TEXTILE FIBERS THAT HELP PLANES FLY

Lay-ups of carbon or glass fabrics, pre-impregnated with resin, cure into stiff shells for wings, fuselages, nacelles, and fairings.

Textile-based composites are now standard across the airframe and interiors.



Beyond structure, cabin textiles and acoustic liners reduce noise and weight, while inherently flame-retardant fibers and finishes help keep airplanes safe.

TEXTILES ARE EVERYWHERE

ADVANCING THE WORLD OF SPORTS

TEXTILES HAVE A BIGGER INFLUENCE IN SPORTS THAN MOST PEOPLE THINK OF

Tennis rackets' strings are manufactured from synthetic fibers.

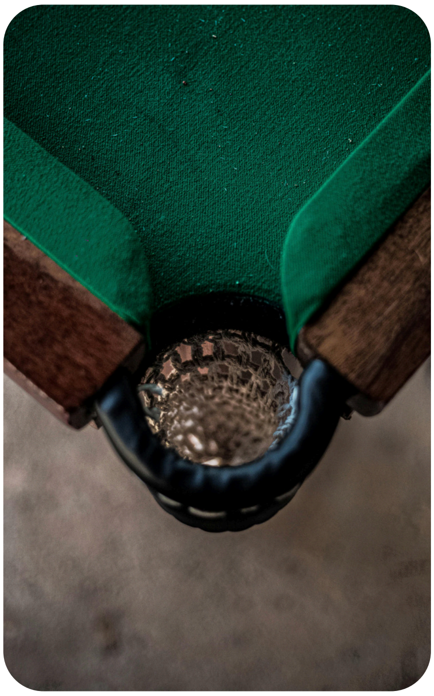
The racket grip is also made from layered textile materials.

The snooker table cloth is a tightly woven wool cloth.

Almost all of them are produced in England.

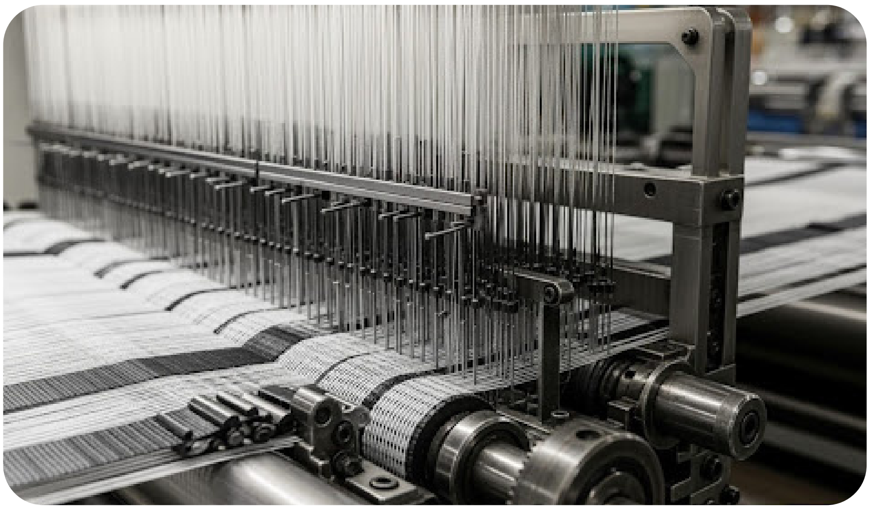
Early skiers wore thick wool or fleece pants.

Gradually, they were replaced by synthetic textiles: warmer and lighter.



* Source: Aqualonis

TEXTILES ARE EVERYWHERE



High-strength woven webbing is the backbone of modern car seat belts.

They are designed to hold forces equivalent to lifting a small car.

PROTECTING LIVES DURING DAILY DRIVES

Airbags are folded fabric cushions that inflate in 20-30 milliseconds.

Microscopic pores in the weave make them deflate immediately when a person hits it.

* Source: Lenzip / Acme Mills

INNOVATION

TEXTILES ARE EVERYWHERE

AIR-PURIFYING TEXTILE FAÇADES

Coating textile membranes with photocatalysts enables building façades break down nitrogen oxides under sunlight, converting them to harmless nitrates that rinse away in rain and serve as natural fertilizer.

* Source: Schüco

TEXTILES ARE EVERYWHERE

GROWING FUTURE MEALS

Agrotextiles - shade nets, crop covers, mulch and weed-control fabrics - create protective microclimates, reduce evaporation, block pests, and mitigate hail and wind.

Farmers can stabilize yields under climate stress, while reducing inputs of water, pesticides, and herbicides.

* Source: Pexels

INNOVATION

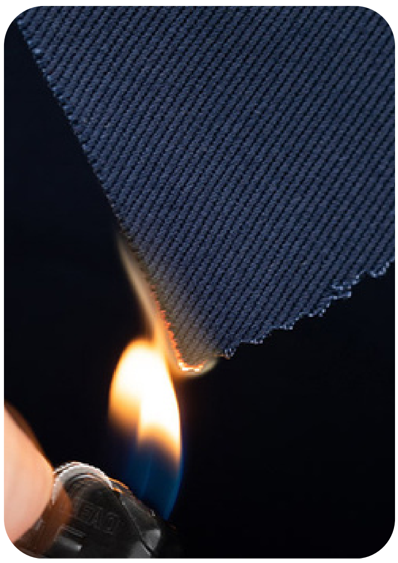
TEXTILES ARE EVERYWHERE

SAFETY YOU CAN WEAR

From flame-resistant and cut-resistant fabrics to breathable chemical barriers, technical textiles safeguard first responders and workers.

Aramid, modacrylic, and treated cellulosics deliver flame performance.

Microporous and monolithic films block chemicals while allowing sweat vapor to escape.



* Source: Pexels

INNOVATION

TEXTILES ARE EVERYWHERE

HIDDEN HOSPITAL SAFETY

Antibacterial fabrics help lower infection risks; advanced dressings manage moisture, support healing, and deliver actives, while implantable meshes and scaffolds restore function in cardiovascular, ocular, and soft-tissue surgery.

From vascular grafts and hernia meshes to ophthalmic implants and hemostatic gauzes, medical textiles offer tailored adaptability and impressive strength.

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Published in June 2026

2026 EDITION

EURATEX 30 YEARS