FACTS & KEY FIGURES
OF THE EUROPEAN TEXTILE AND CLOTHING INDUSTRY
2020 EDITION
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**EURATEX | The Voice of the European Textile and Apparel Industry**

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The textile and clothing (T&C) sector is an important part of the European manufacturing industry, playing a crucial role in the economy and social well-being in many regions of Europe. The sector includes ca. 160,000 companies (of which 99.8% are micro & small companies), employing 1.5 million people and generating a turnover of €162 billion.

The textile and clothing industry covers a wide range of activities, from the transformation of natural or man-made fibres into yarns and fabrics, to the production of a wide variety of products such as hi-tech synthetic yarns, bed-linens, industrial filters, and clothing and fashion.

The corona crisis has confirmed the strategic importance of the sector: the safety of healthcare workers and the population at large depend on textiles, but their importance goes far beyond. Without textile materials, no cars, airplanes or buildings can be built, nor can agri-food workers, defence and security forces or craftsmen, do their work in full.

This publication aims at highlighting the main characteristics of our industry, present key data and important trends on trade, innovation, sustainability and more.

The information provided will undoubtedly help to better understand and appreciate the importance, but also the challenges of our industry in today’s economy.
KEY FIGURES 2019 estimated

- **TURNOVER**: 162 BILLION € (-1.8%)
- **INVESTMENT**: 5 BILLION € (+2.7%)
- **COMPANIES**: 160 THOUSAND (-2.3%)
- **EMPLOYEES**: 1.5 MILLION (-2.3%)
- **EXPORTS**: 61 BILLION € (+4.8%)
- **IMPORTS**: 109 BILLION € (+3.3%)
- **TRADE BALANCE**: -48 BILLION € (+1.4%)

<table>
<thead>
<tr>
<th>2019e</th>
<th>UNIT</th>
<th>TEXTILE*</th>
<th>CLOTHING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turnover</td>
<td>billions €</td>
<td>88.8</td>
<td>72.8</td>
</tr>
<tr>
<td>Investment</td>
<td>billions €</td>
<td>3.4</td>
<td>1.40</td>
</tr>
<tr>
<td>Companies</td>
<td>number</td>
<td>50,947</td>
<td>108,758</td>
</tr>
<tr>
<td>Employment</td>
<td>1000 pers.</td>
<td>593</td>
<td>922</td>
</tr>
<tr>
<td>Exports</td>
<td>billions €</td>
<td>26</td>
<td>35</td>
</tr>
<tr>
<td>Imports</td>
<td>billions €</td>
<td>29</td>
<td>80</td>
</tr>
<tr>
<td>Trade Balance</td>
<td>billions €</td>
<td>-4</td>
<td>-44</td>
</tr>
</tbody>
</table>

* Include Man-made fibres

Data based on UE27
Numbers in white circles show the 2019/2018 percentage change
Source: EURATEX, based on EUROSTAT
PROFILE

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PROFILE

THE TEXTILE MANUFACTURING PROCESS

A COMPLEX VALUE CHAIN AND DIVERSITY OF PRODUCT

1. SPINNING

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

2. WOVEN, KNITTED OR OTHER METHOD

YARNS
Including:
- Spun
- Filament

3. DYEING AND/OR PRINTING FABRIC

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

4. MANUFACTURING

FINISHED TEXTILES & CLOTHING

FASHION & CLOTHING
for example:
underwear, shirts, suits, dresses, coats

FURNISHING & HOME
for example:
curtains, upholstery, carpets, bed linen

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

Source:
EURATEX

FACTS & KEY FIGURES 2020 • PAGE 8
TEXTILE & CLOTHING IN TOTAL EU MANUFACTURING ACTIVITIES

NEARLY 1 OUT OF 10 MANUFACTURING COMPANIES BELONGS TO THE T&C SECTOR

T&C SHARE IN TOTAL MANUFACTURING ACTIVITIES, 2018

- Employment: 5%
- Gross investment: 1%
- Value added: 2%
- Production value: 2%
- Turnover: 2%
- Number of enterprises: 9%

Unless specified, EU refers to EU27
Source: EURATEX calculations, based on EUROSTAT data
### COMPANIES IN THE T&C INDUSTRY

**Profile**

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

#### Breakdown by sector

<table>
<thead>
<tr>
<th>Size of Companies (number of employees)</th>
<th>Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Micro [0 - 9]</td>
<td>88.8%</td>
</tr>
<tr>
<td>Small and Medium sized Enterprises [10 - 249]</td>
<td>11.0%</td>
</tr>
<tr>
<td>Large &gt; 250</td>
<td>0.2%</td>
</tr>
</tbody>
</table>

99.8% of total companies in T&C industry are MICRO AND SMEs' enterprises.

67% of companies are clothing companies and 33% textiles.

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Unless specified, EU refers to EU27
Source: EURATEX calculations, based on EUROSTAT data
EMPLOYMENT AND PRODUCTIVITY PER EMPLOYEE

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

Evolution of labour force and productivity per employee, between 2009 and 2018

- Total Pers employed (left axis)
- Value added per emp (thousand euro) (right axis)

Data based on EU28
Source:
EURATEX based on members' data and EUROSTAT
PROFILE

EMPLOYMENT BY AGE

AGEING: AN ADDITIONAL OPPORTUNITY FOR ENTERPRISES TO CREATE NEW JOBS

Evolution of labour force and workers over 50 years old, between 2009 and 2018

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Persons Employed</th>
<th>% of Total Employees over 50 years old</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>2,163</td>
<td>24%</td>
</tr>
<tr>
<td>2010</td>
<td>2,033</td>
<td>25%</td>
</tr>
<tr>
<td>2011</td>
<td>1,879</td>
<td>26%</td>
</tr>
<tr>
<td>2012</td>
<td>1,772</td>
<td>28%</td>
</tr>
<tr>
<td>2013</td>
<td>1,728</td>
<td>29%</td>
</tr>
<tr>
<td>2014</td>
<td>1,685</td>
<td>29%</td>
</tr>
<tr>
<td>2015</td>
<td>1,680</td>
<td>30%</td>
</tr>
<tr>
<td>2016</td>
<td>1,682</td>
<td>33%</td>
</tr>
<tr>
<td>2017</td>
<td>1,694</td>
<td>34%</td>
</tr>
<tr>
<td>2018</td>
<td>1,664</td>
<td>35%</td>
</tr>
</tbody>
</table>

Data based on EU28
Source:
EURATEX based on members’ data and EUROSTAT
EMPLOYMENT BY GENDER

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

Employment by gender, 2018

- Men: 29.2%
- Women: 70.8%
Textiles and man-made fibres represent 55% and clothing 45% of total T&C turnover:
162 billion EUR
(2019e)
The sub-sector of technical textiles is one of the most dynamic, accounting for a growing share in the EU Textile production. Growing demand for technical textiles is based on applications in various industries such as healthcare, agriculture, construction, sportswear, automotive, etc...
In 2018, 62% of total investment is made by the top 5 EU Member States.

Gross investment in tangible goods is defined as investment during the reference period in all tangible goods. Included are new and existing tangible capital goods, whether bought from third parties or produced for own use (i.e. capitalised production of tangible capital goods), having a useful life of more than one year including non-produced tangible goods such as land. Investments in intangible and financial assets are excluded.
Europeans spend on average **600 EUR** per year for their clothes.

In 2018, households in the European Union spent almost € 264 bn on clothing articles, an increase of 10% over the decade.
Around 4 out of 10 e-shoppers in the EU had bought clothes and/or sports goods online during 2019.

<table>
<thead>
<tr>
<th>Online purchases per product category*</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>clothes, sports goods</td>
<td>41%</td>
</tr>
<tr>
<td>travel and holiday accommodation</td>
<td>34%</td>
</tr>
<tr>
<td>household goods</td>
<td>29%</td>
</tr>
<tr>
<td>tickets for events</td>
<td>26%</td>
</tr>
<tr>
<td>books/magazines/newspapers</td>
<td>21%</td>
</tr>
<tr>
<td>films/music</td>
<td>18%</td>
</tr>
<tr>
<td>electronic equipment</td>
<td>17%</td>
</tr>
<tr>
<td>food/groceries</td>
<td>17%</td>
</tr>
<tr>
<td>computer software</td>
<td>15%</td>
</tr>
<tr>
<td>telecom services</td>
<td>13%</td>
</tr>
<tr>
<td>others</td>
<td>11%</td>
</tr>
<tr>
<td>computer hardware</td>
<td>11%</td>
</tr>
<tr>
<td>medicine</td>
<td>10%</td>
</tr>
<tr>
<td>e-learning material</td>
<td>5%</td>
</tr>
</tbody>
</table>

* as % of people who ordered goods/services online during 2019
COVID19

Major concerns about the pandemic:

- Estimated impact on turnover in 2020 for the T&C industry: -50 BILLION €

Strategic proposals for recovery:

- Sustainable supply chains
- Recycling hubs
- Innovation & Digitalisation
- Access to markets
- Skills and sector profile

Source: EURATEX coronavirus survey, April 2020
EU TRADE

World exports of textiles of clothing | 21 | 21 | 22

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EU TRADE

WORLD EXPORTS OF TEXTILES
EUROPE IS THE WORLD’S 2ND EXPORTER IN OUR INDUSTRY

TOP 15 textiles’ exporters of the world
Bn EUR

1. China: 106
2. European Union (28): 66
3. India: 16
4. United States of America: 12
5. Turkey: 11
6. Korea, Republic of: 9
7. Chinese Taipei: 8
8. Viet Nam: 7
9. Pakistan: 7
10. Hong Kong, China: 7
11. Japan: 6
12. Indonesia: 4
13. Thailand: 3
14. Mexico: 3
15. United Arab Emirates: 2

(1) China: Includes significant shipments through processing zones.
(2) EU 28: Includes intra-EU trade
EU TRADE

WORLD EXPORTS OF CLOTHING

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

TOP 15 clothing' exporters of the world
Bn EUR

China 141
European Union (28) 128
Bangladesh 16
Turkey 14
Hong Kong, China 12
Viet Nam 12
India 11
Indonesia 8
Cambodia 7
United States of America 5
Pakistan 5
Malaysia 5
Sri Lanka 5
Mexico 4
Myanmar 4

(1) China: Includes significant shipments through processing zones.
(2) EU 28: Includes intra-EU trade
EU TRADE

EU TRADE FLOWS: IMPORTS, EXPORTS AND TRADE BALANCE

Over the last years, our trade performance has improved considerably, reaching a relative stabilisation of the EU trade deficit.
1/3 of T&C products are sold from China to the EU markets

United Kingdom is the EU main export market

Unless specified, EU refers to EU27
Source: EURATEX, based on IHS
European clothing (i.e. trousers, overcoats, pullovers, skirts and dresses) is the most attractive product category to customers worldwide.

Unless specified, EU refers to EU27
Source: EURATEX, based on IHS
T&C EXPORTS, IN 2019

% Share

**EUROPEAN TRADE**

**THE EUROMED AREA IS A KEY DESTINATION FOR EU EXPORTERS**

**LEGEND:**
- **PANEUROMED:** Albania, Algeria, Bosnia & Herzegovina, Egypt, Faroe islands, Iceland, Israel, Jordan, Lebanon, Libya, Liechtenstein, Macedonia, Moldova, Montenegro, Morocco, Norway, Palestine, Serbia and Kosovo, Switzerland, Syria, Tunisia, Turkey
- **FTA NEGOTIATION:** Indonesia, Philippines, the United Kingdom
- **OTHER WTO MEMBERS AND OBSERVERS:** including China and Russia
- **FTA SIGNED:** ACP/EPA (Economic Partnership Agreements between the EU and African, Caribbean and Pacific partners), Chile, Colombia, Mexico, S. Africa, Peru, S. Korea, Singapore, Japan, Canada, Ecuador, MERCOSUR (Argentina, Brazil, Paraguay, Uruguay), Ukraine, Vietnam, CACM (Costa Rica, Panama, Nicaragua, El Salvador, Guatemala, Honduras).
- **FTA ON HOLD:** USA, GCC (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, the UAE), India, Malaysia, Thailand

Unless specified, EU refers to EU27
Source: EURATEX, based on IHS
**FTA SUCCESS STORIES**

**EU TRADE**

**THAT HELP THE EU GROWING**

- **SOUTH KOREA** (enforced in 2015): It went further than any of the previous EU agreements in lifting trade barriers, and it was also the first EU trade deal with an Asian country.

- **CANADA** (entered into force in 2017): removed customs duties on key EU manufacturing exports to Canada, namely in textile and clothing articles, from 16% to 0%.

- **JAPAN** (entered into force in 2019): European exports to Japan grew by +8.2% in the first ten months following the implementation of the agreement.
SUSTAINABILITY

Chemicals in T&C | 29
Air emission CO2  | 30
Circular economy  | 31
BEST USE OF CHEMICALS IN T&C

Industry certification increased to ensure safe use of chemicals. Three examples of the largest programmes.

1. **BLUESIGN**
   - Signatories 2018: 523
   - Signatories 2019: 616
   - Increase: +18%

   BLUESIGN is a holistic system that provides solutions in sustainable processing and manufacturing to industries and brands.
   
   Source: Bluesign 2019

2. **ZDHC**
   - Signatory brands: 30
   - Value chain affiliates: 102
   - Associates: 18

   ZDHC is an organisation dedicated to eliminating hazardous chemicals and implementing sustainable chemicals in the leather, textile and synthetics sectors.

   Source: ZDHC 2019

3. **OEKO-TEX®**
   - Europe released certificates 2017: 5,299
   - Europe released certificates 2018: 5,840
   - Increase: +10%

   OEKO-TEX®® consists of 18 independent institutes in Europe and Japan developing test methods and limit values for the textiles.

   Source: OEKO Tex 2019

Unless specified, EU refers to EU27
Source: EURATEX
Energy efficiency is of critical importance for the textile and clothing industry and to reduce CO2 emissions.
MAKING CIRCULAR ECONOMY HAPPEN

EUROPEAN T&C COMPANIES EMBRACE CIRCULARITY WITH INNOVATIVE AND SUSTAINABLE SOLUTIONS

100% RECYCLED FABRICS AND FASHION MADE FROM MAINLY POST-CONSUMER BLENDED TEXTILE WASTE

100% recycled fabrics and fashion made from mainly post-consumer blended textile waste that otherwise would have been incinerated. The company makes new textiles in 4 steps:

- no longer wearable textiles are sorted by colour and material;
- after removing zippers/buttons the textile waste is shredded into new fibres;
- new yarn is spun from a composition of both shredded post-consumer textile fibers with recycled polyester; the yarn is used for weaving or knitting of new textiles;
- the recycled textiles can then be used to make garments.

YARN WITH HIGH INCORPORATION OF RECYCLED CORK

The new yarn has technical benefits, such as:

- higher breaking strength and elongation; abrasion resistance; resistance to pilling; dimensional stability to domestic washing and drying; determination of antibacterial activity and tear resistance;
- expand eco-based materials with re-using cork waste;
- maintains the ancient European cork oak forest and industry that retains more than 14 million tonnes of CO2 per year.

Source: www.circulary.eu/project/sedacor

CORPORATE GARMENT MADE BY COMBINING RECYCLED TEXTILE AND RECYCLED PET

Post-consumer corporate garment made of recycled yarns by combining 50% of recycled textile and 50% of recycled PET. Its added value:

- no need for new raw materials;
- no waste as the clothes that the company produces is also collected after being worn out to further go into recycling;
- the process saves 40% of energy and +/- 99% of water as well as reduces CO2 emissions.

Source: www.circulary.eu/project/schijvens

Unless specified, EU refers to EU27
Source: EURATEX
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Smart, digital & bio-based | 34

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EUROPE: WORLD CAPITAL OF TEXTILE RESEARCH, INNOVATION & HIGHER EDUCATION

THE INDUSTRY’S KNOWLEDGE BASE AND INNOVATION CAPACITY IS SUPPORTED BY AN UNPARALLELED NETWORK OF COMPETENCE PROVIDERS

Textile research and technology centres

40

- Carrying out applied and collaborative research.
- Offering technology transfer, testing, certification and training services.

Textile departments at Technical Universities

50

- Graduating Bachelor, Master and PhD students.
- Engaging in fundamental and collaborative research.

Universities of applied sciences and fashion colleges

80

- Graduating Bachelor and Master students.
- Engaging in applied and collaborative research and training activities.

Textile innovation clusters

15

- Offering technology transfer, business development, promotion and training services.
- Engaging in networking and open innovation activities.

Source: EURATEX
SMART HIGH-PERFORMANCE MATERIALS AND PRODUCTS

High-performance fibres, functionalised fabrics and e-textiles will enable entirely new generations of high-value-added products for many end markets.

DIGITAL MANUFACTURING AND SUPPLY CHAINS

Virtual simulation of materials and products, digitalised processes and smart factories and fully connected supply chains all the way to the end consumer will be the norm in the textile industry 4.0.

BIO-BASED MATERIALS & PROCESSING

Sustainably grown natural or man-made bio-based fibres will regain their dominance in the textile industry. Bio-based chemicals and non-toxic, energy-efficient processing and finishing technologies will make the textile industry of tomorrow highly sustainable.

Example: "an automotive door lining material: a biodegradable thermoplastic composite made of natural fibers and PLA"

Source: EURATEX | Textil+mode | ITA - Institut für Textiltechnik of RWTH Aachen University
Adding electronic gadgets or sensors to provide functionality or enhance comfort is becoming a norm these days in the next-generation of textiles, clothing and wearable accessories. The EU smart textiles’ market is expected to reach €1.5 bn in 2025.

Beyond consumer wearables for health, sports and entertainment, e-textiles have great potential in:

- Personal protection/defence
- Automotive
- Construction and interiors
- Aerospace
- Energy
- Maritime
- Environmental protection
- Agriculture

The SmartX – the European Smart Textiles Accelerator will fund 40 smart textiles innovators in 2020-22.