FACTS & KEY FIGURES 2024

OF THE EUROPEAN TEXTILE AND CLOTHING INDUSTRY

2024 EDITION

EURATEX

THE EUROPEAN APPAREL AND TEXTILE CONFEDERATION

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THE EUROPEAN APPAREL AND TEXTILE CONFEDERATION

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FOREWORD

EURATEX | THE VOICE OF THE EUROPEAN TEXTILE AND APPAREL INDUSTRY

The textile and fashion industry is going through turbulent times; geo-political unrest, the energy crisis, drop in consumer confidence, the subsidy race and other state interventions create a tough economic climate for textile entrepreneurs to prosper. On top of that, the EU is moving forward with the implementation of its dedicated EU Textile Strategy. That means 16 pieces of legislation on the table, which will reshape the regulatory context for the textile and fashion industry. Much of that legislation is still under discussion at the level of EU institutions, member states and many other stakeholders who want to promote their specific perspective. But change is coming – that's clear.

In such climate of economic and regulatory uncertainty, it is critically important to communicate about the performance and tendencies within the textile industry. Therefore "facts and figures" are essential, to ensure a quality debate which is based on science and not ideology; to make sure we develop a regulatory framework which is ambitious but realistic.

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

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

The purpose of this publication is to develop a broader understanding on what "textiles" is all about – nearly 200.000 companies and 1,3 million workers, committed to quality and proud of their products. EURATEX and its member associations will continue to promote and defend these companies, to ensure we maintain a competitive European textile industry.

Alberto Paccanelli
President

Dirk Vantyghem
Director General

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KEY FIGURES OF THE TEXTILE & CLOTHING INDUSTRY, 2023

KEY FIGURES

2023 estimated

170 BILLION € — **TURNOVER** (+2%)

64 BILLION € — **EXPORTS** (-3.8%)

4.5 BILLION € — **INVESTMENT***

115 BILLION € — **IMPORTS** (-17%)

197 THOUSAND — **COMPANIES***

1.3 MILLION — **EMPLOYEES** (-1.1%)

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

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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%

MANUFACTURING

FINISHED TEXTILES & CLOTHING

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:
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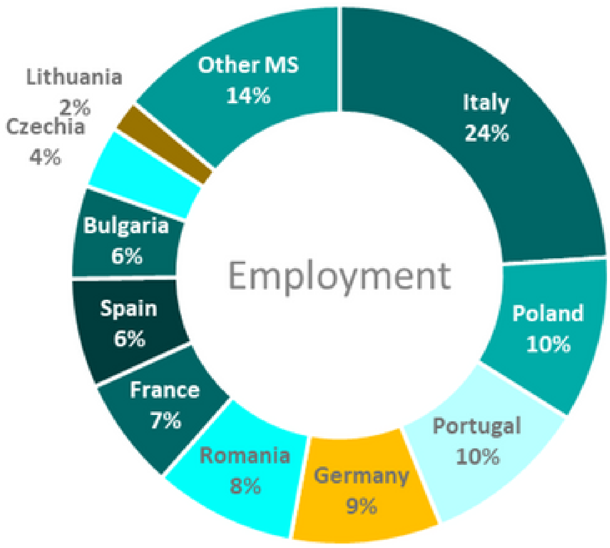
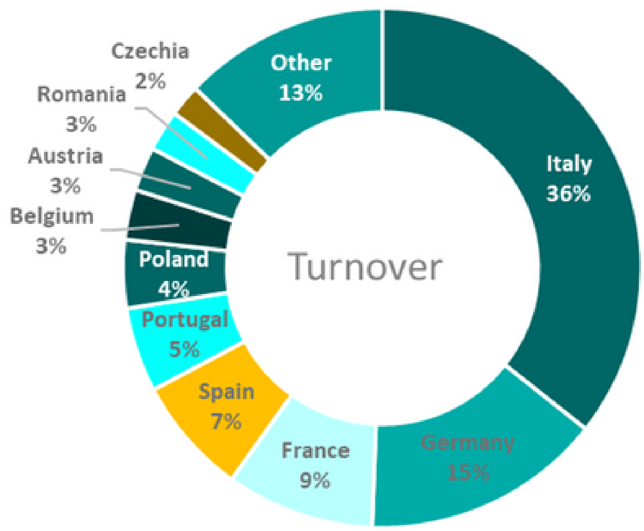
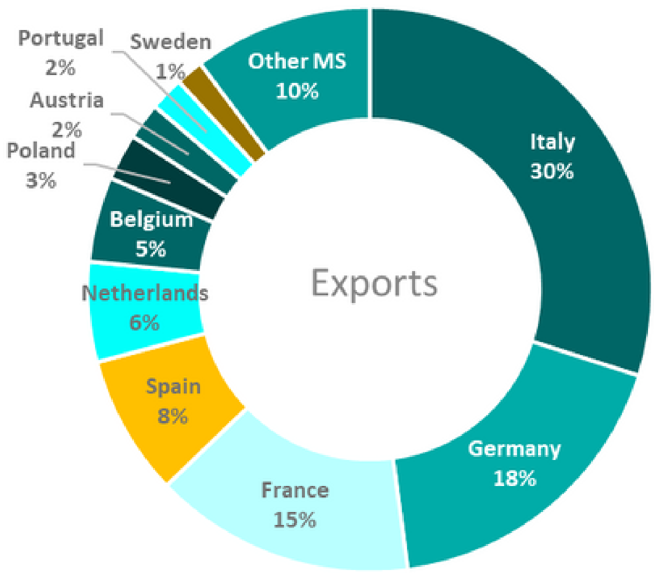
PROFILE

MEMBER STATES SHARE IN TOTAL EU

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







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

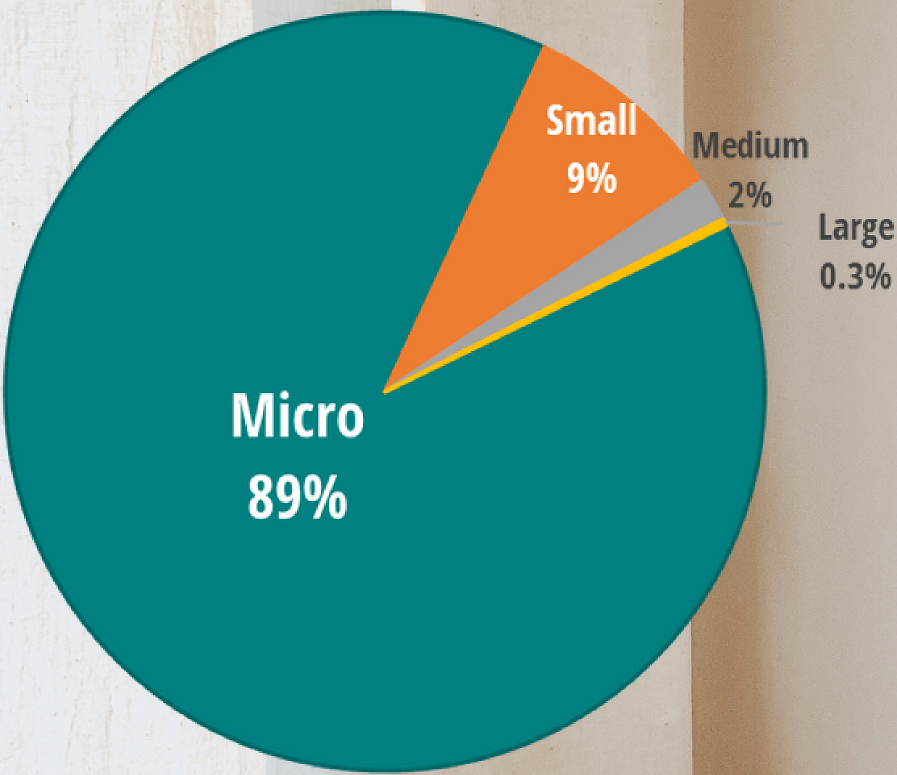
PROFILE

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

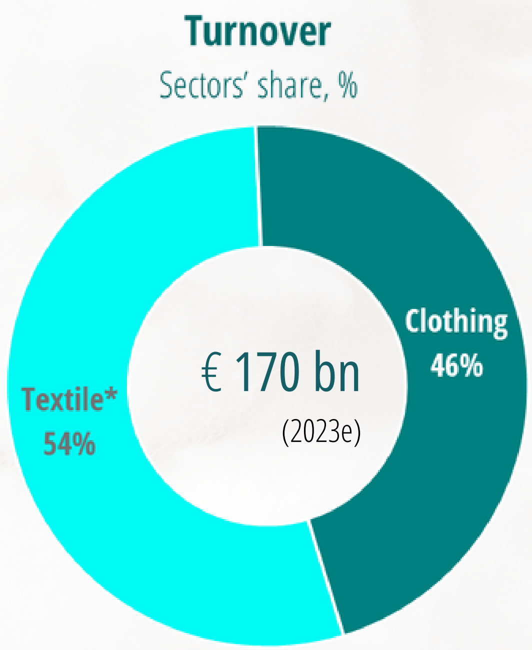
Source:

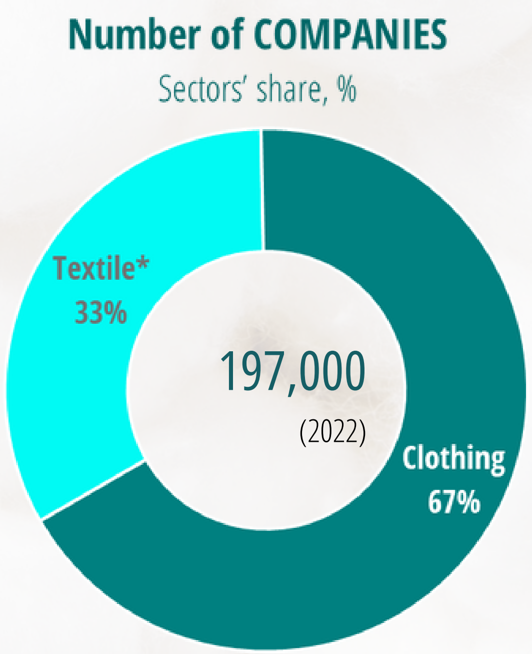
EURATEX calculations, based on EUROSTAT data

PROFILE

TURNOVER AND COMPANIES

BY SUB-SECTOR





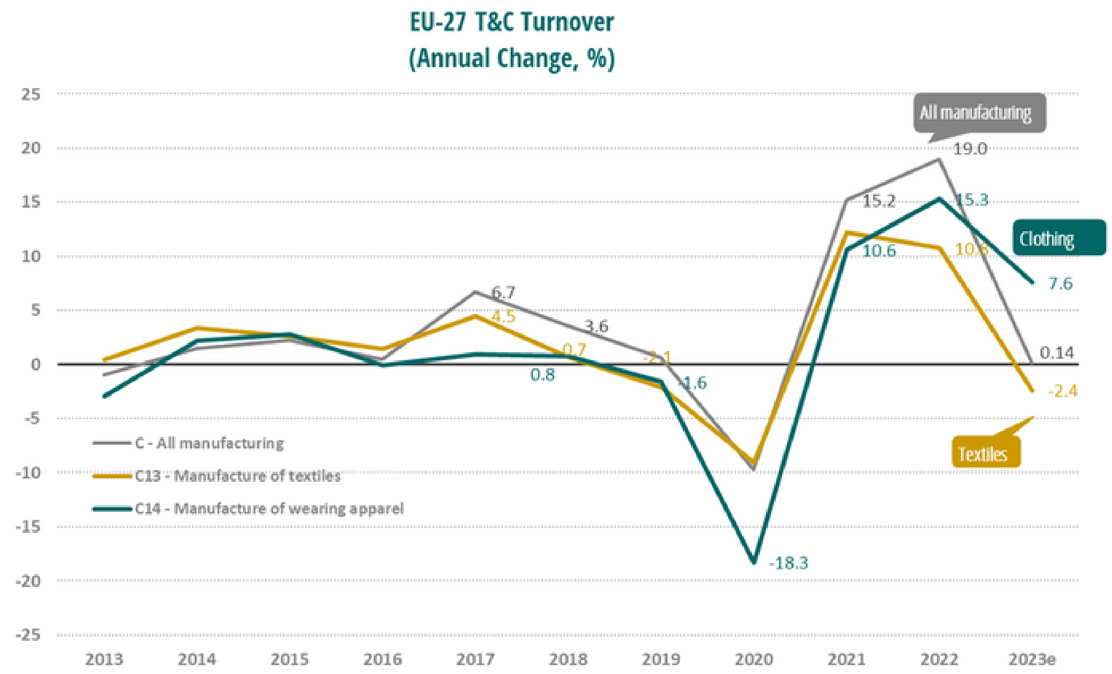
* Textile: including man-made fibers

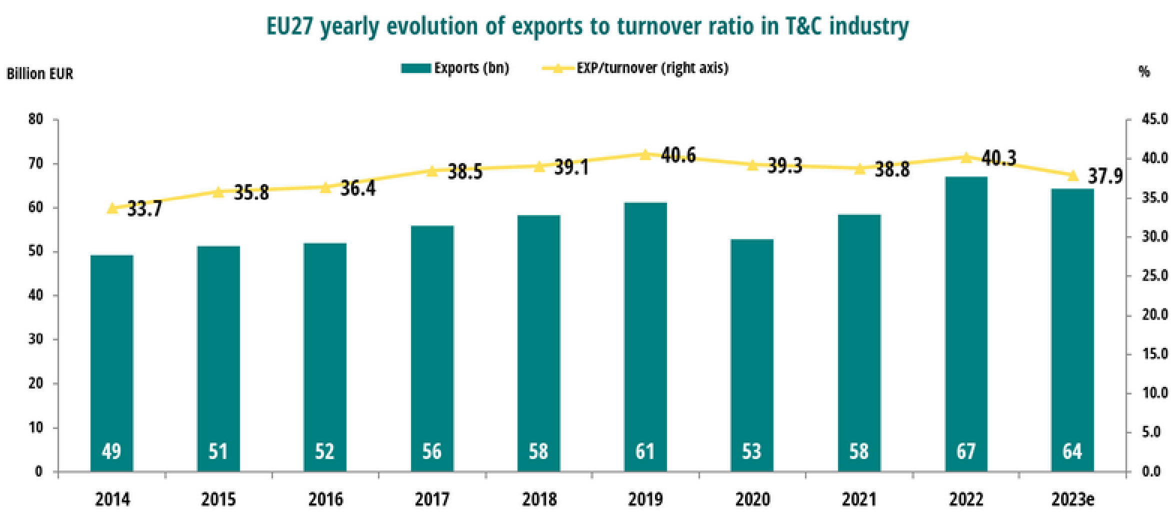
Unless specified, EU refers to EU27
Source:
EURATEX calculations, based on EUROSTAT data

PROFILE

TURNOVER AND EXPORTS

“THE STRONG RECOVERY FROM COVID-19 HAS SLOWED DOWN DUE TO RISING COSTS AND LOWER DEMAND”





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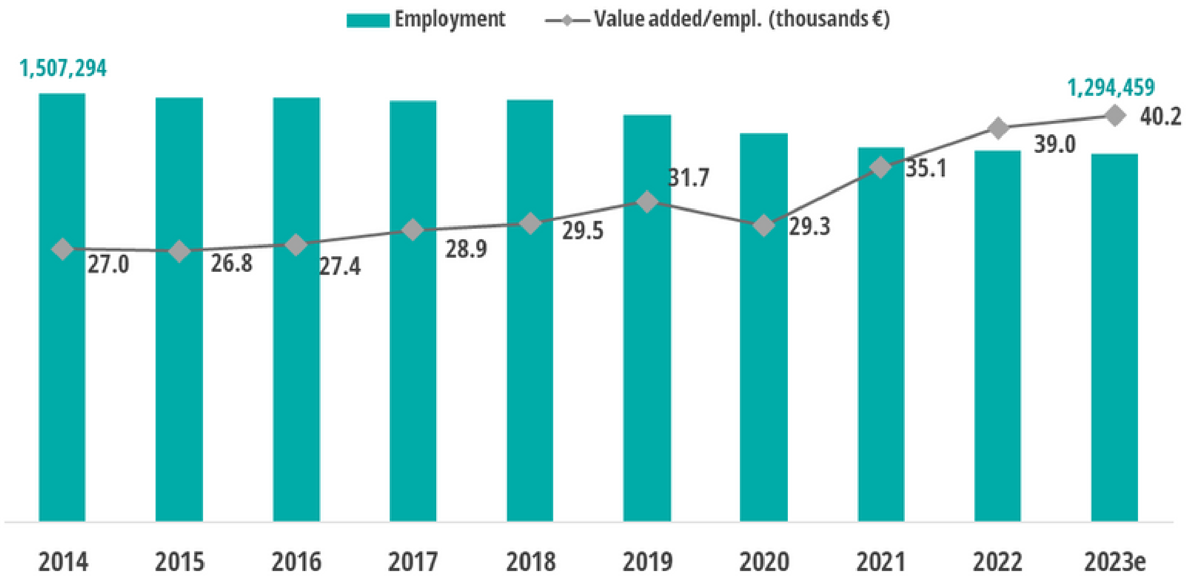
EURATEX calculations, based on EUROSTAT data

EMPLOYMENT AND PRODUCTIVITY PER EMPLOYEE

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

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

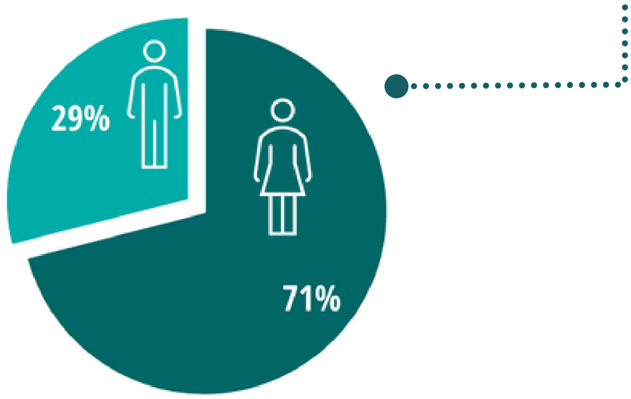


Employment by Gender

Women represent more than

70%

of all employees in the sector.



Source:
EURATEX calculations, based on EUROSTAT data

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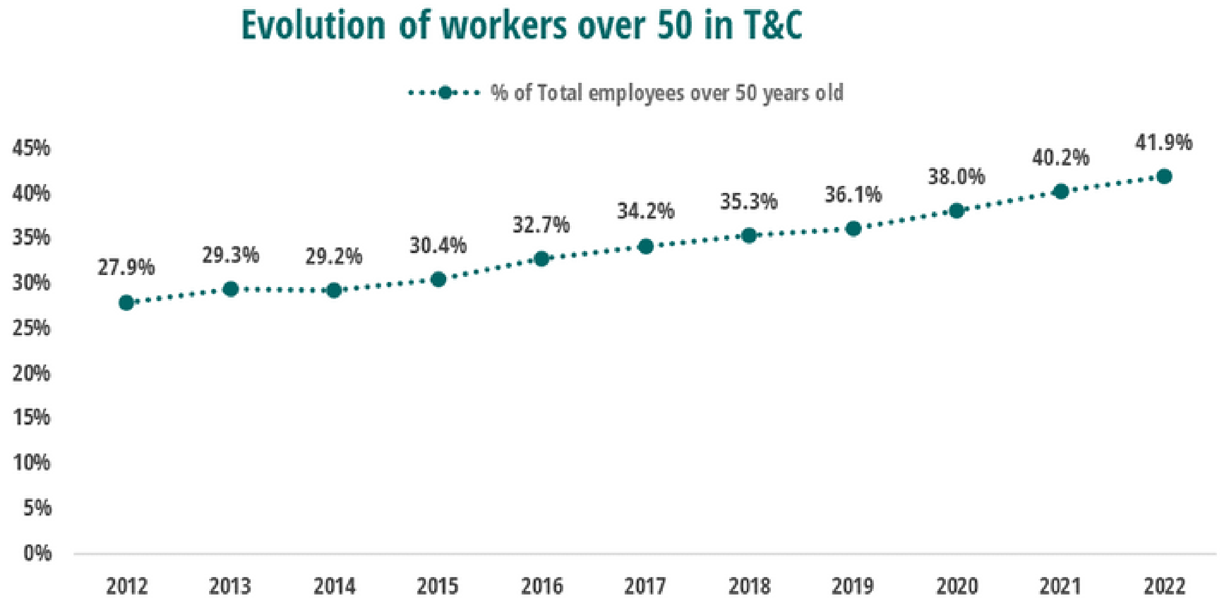
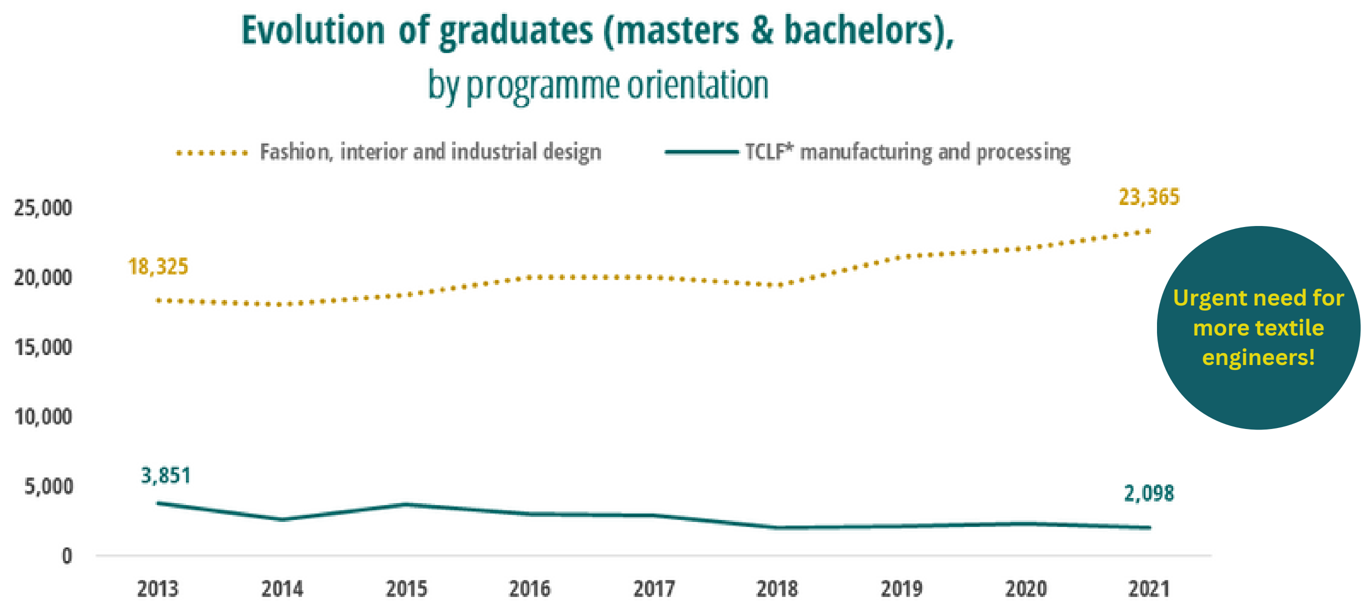
EMPLOYMENT AND SKILLS

AGEING: AN **ADDITIONAL OPPORTUNITY** FOR ENTERPRISES TO CREATE NEW JOBS





*TCL: Textile, Clothing and Leather

Source:

EURATEX calculations, based on EUROSTAT data

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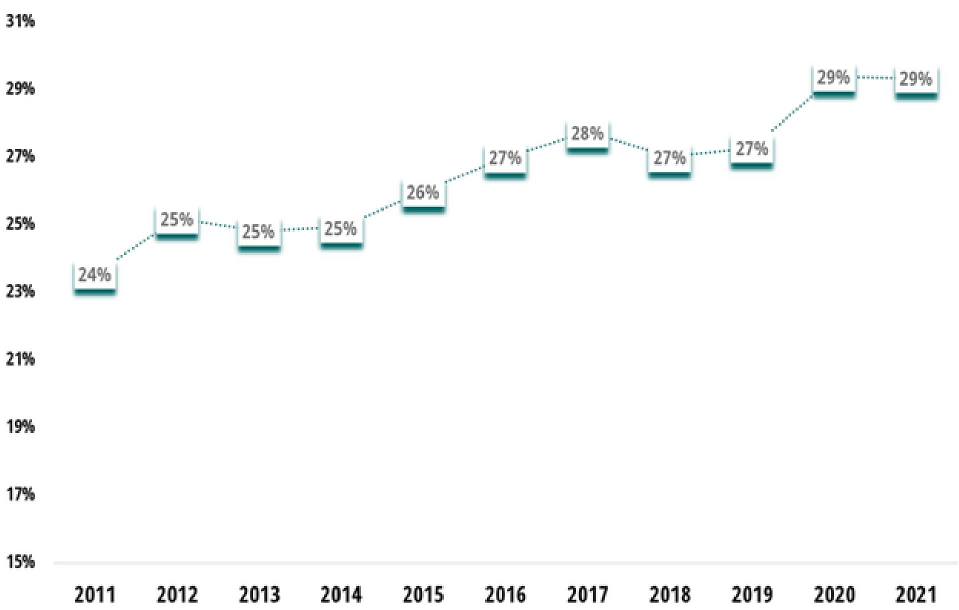
PRODUCTION OF TECHNICAL TEXTILES

THE EU PRODUCTION OF TECHNICAL TEXTILES IS GROWING IN IMPORTANCE

Share of technical textiles in total textile production
(2011-2021 evolution, % based on values)



The sub-sector of technical textiles is one of the most dynamic, accounting for a growing share in the EU Textile production.

Growing demand for technical textiles is based on applications in various industries such as healthcare, agriculture, construction, sportswear, automotive, etc...

Source:
EURATEX calculations, based on EUROSTAT data

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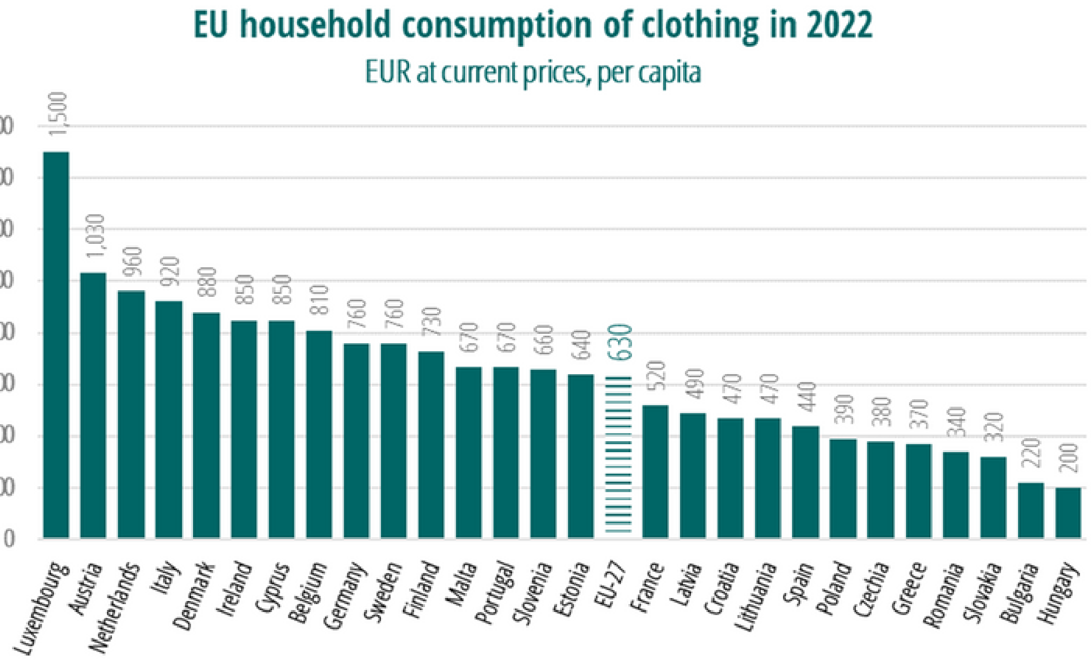
HOUSEHOLD CONSUMPTION

EU IS A KEY MARKET FOR FASHION



In 2022, households in the European Union spent

€ 282 bn (or € 630 per citizen)

on clothing articles,

a 15% increase compared to the previous year.

Unless specified, EU refers to EU27
Source:
EUROSTAT

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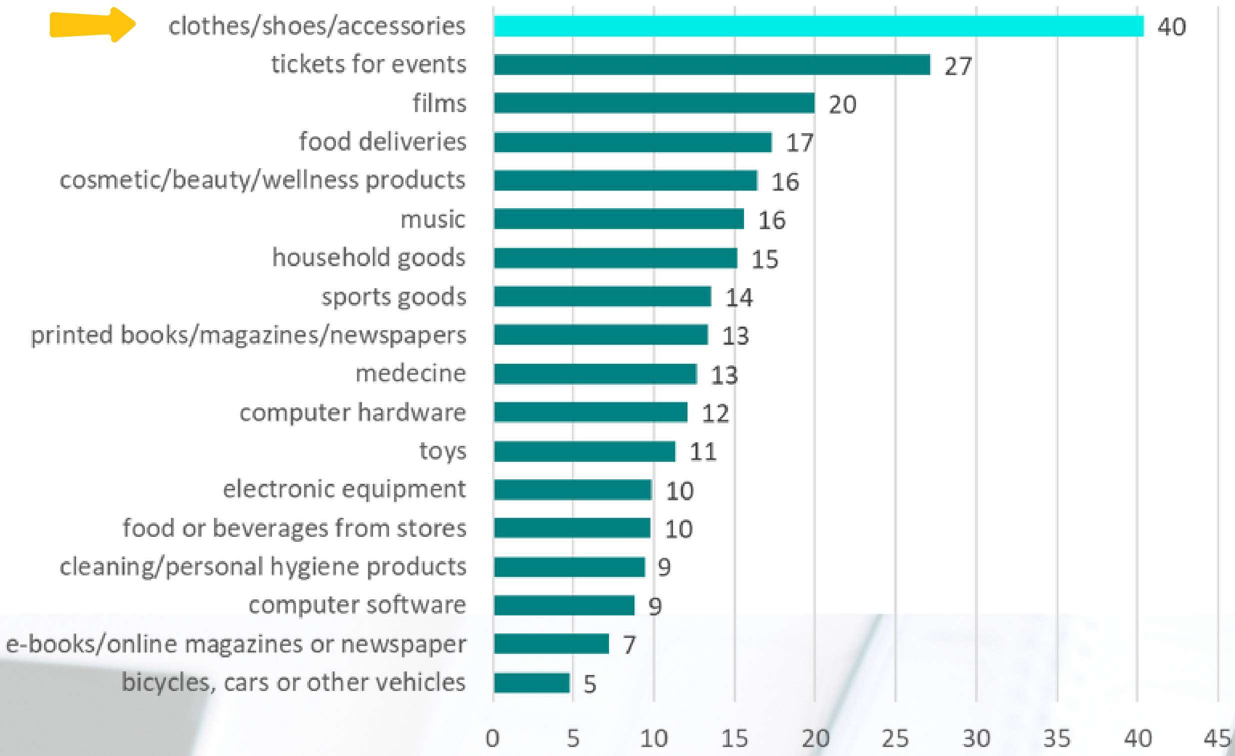
PROFILE

E-COMMERCE

CLOTHES & SHOES ARE THE MOST POPULAR **ONLINE PURCHASES** IN THE EU (2023)

Online purchases per product category (% of individuals)*



**as % of people who ordered goods/services online during 2023*
(the survey is collecting data of internet users, individuals who have used the internet in the 3 months prior to the survey.)

Around 4 out of 10 e-shoppers in the EU had bought clothes and/or shoes online during 2023

Unless specified, EU refers to EU27
Source:
EUROSTAT

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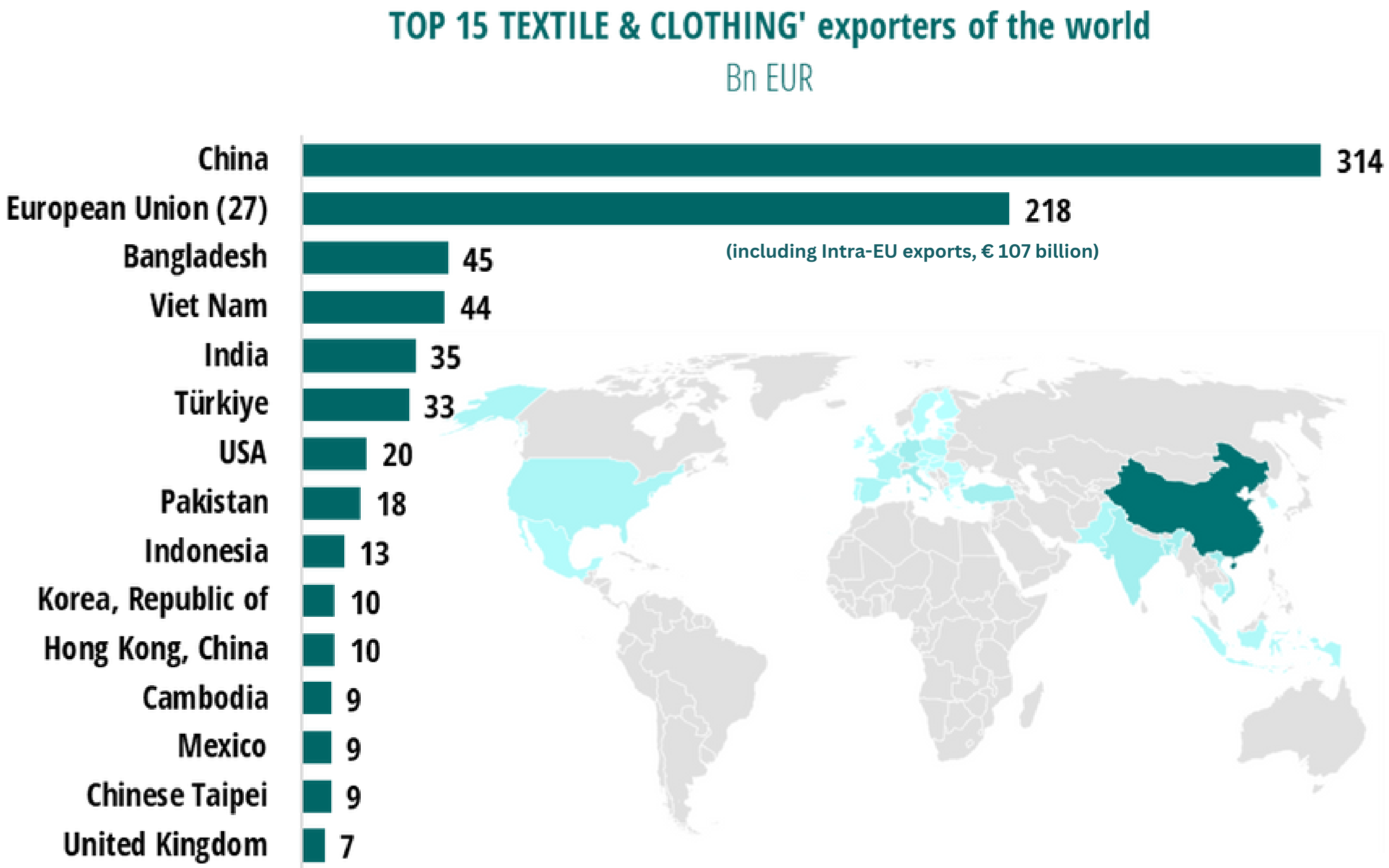
WORLD EXPORTS OF TEXTILES AND CLOTHING

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



Data based on EU27
Source:
WTO 2024, based on 2022 data

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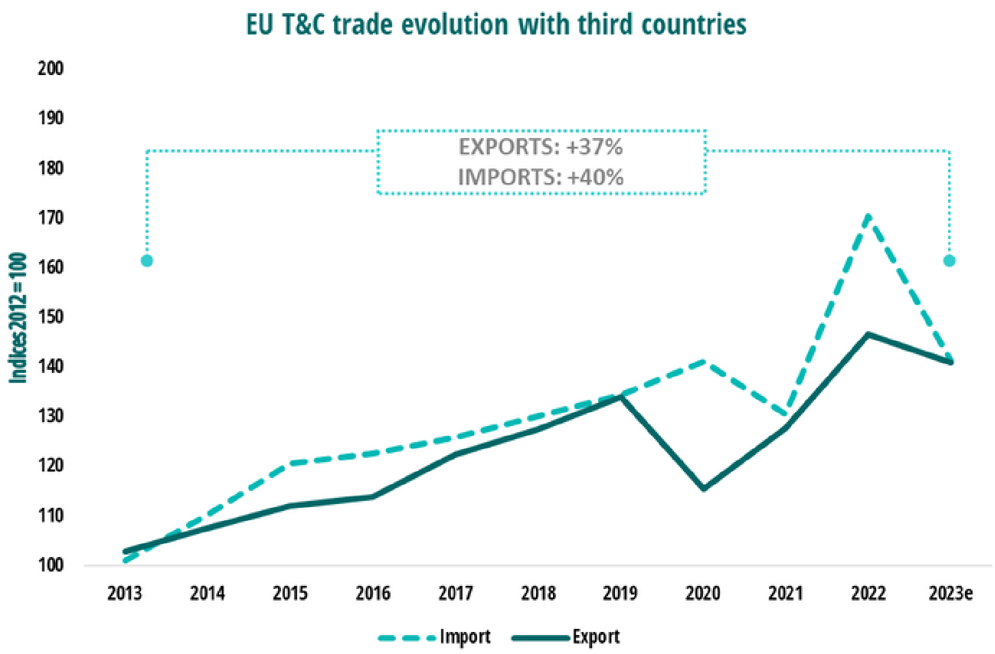
EU TRADE : IMPORTS AND EXPORTS EVOLUTION

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

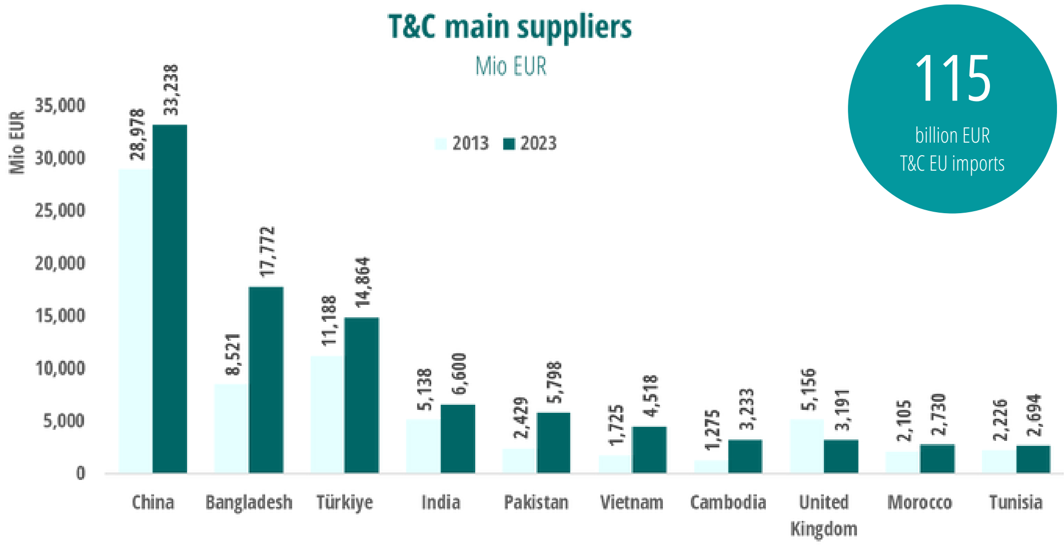


Unless specified, EU refers to EU27
Source:
EURATEX, based on IHS

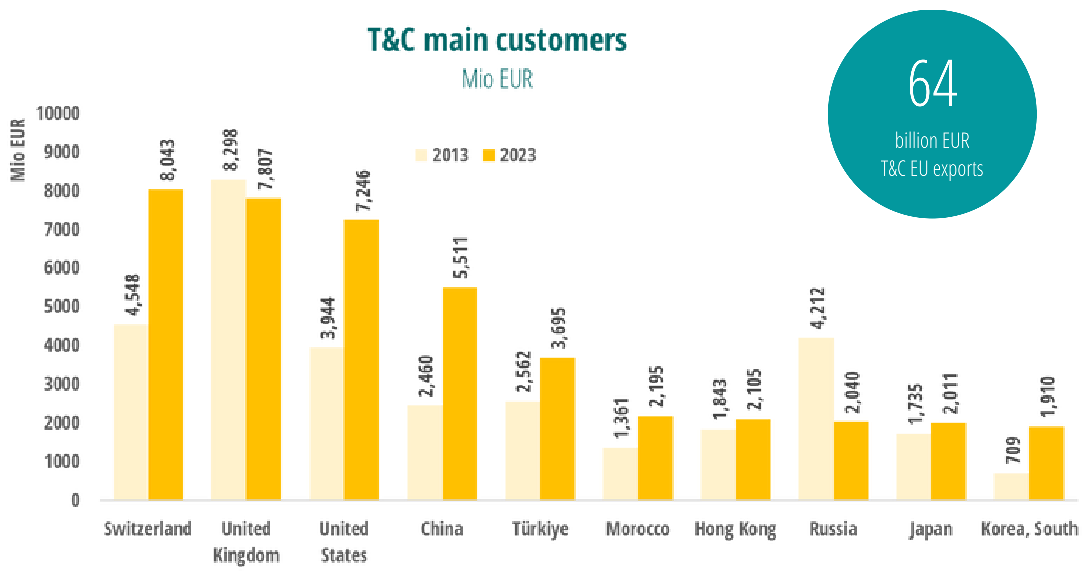
EU TRADE FLOWS BY MAIN PARTNERS

IN 2023, THE **TOP 10 EU SUPPLIERS HAD A 82%** SHARE IN TOTAL IMPORTS FROM THIRD COUNTRIES, AND **THE TOP 10 EU CUSTOMERS ACCOUNTED FOR 66%** OF THE TOTAL EXPORTS TO THIRD COUNTRIES.

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



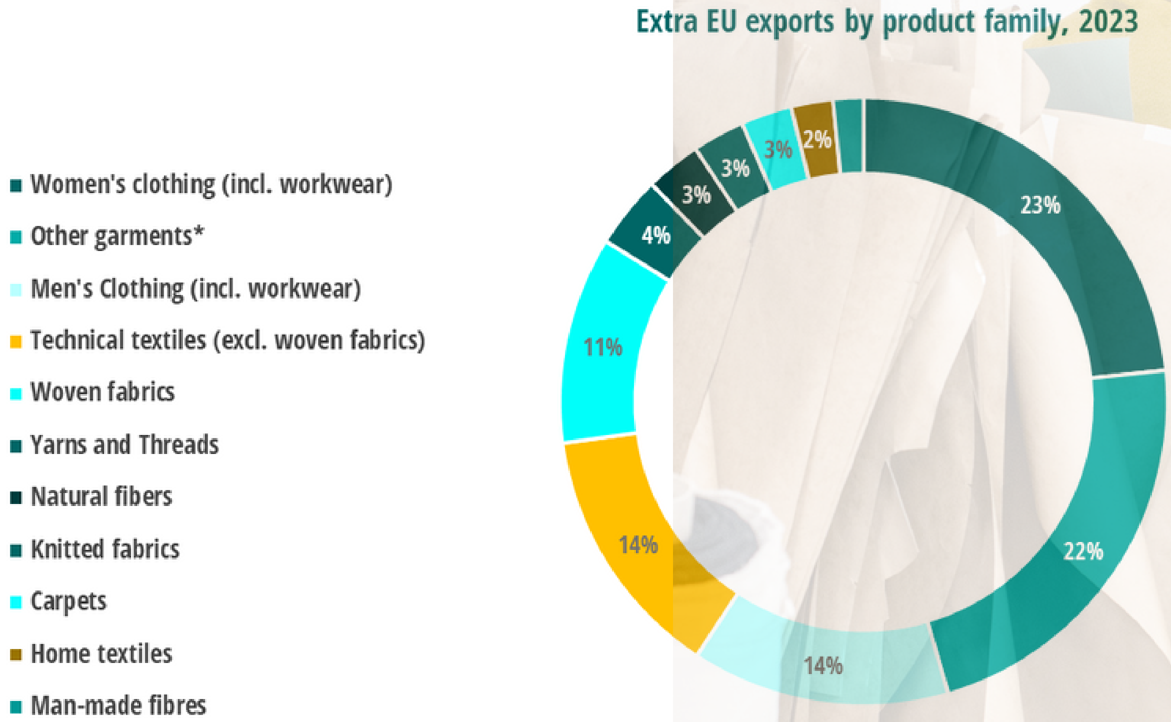
Switzerland and UK are the EU main export markets



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

EU EXPORTS BY PRODUCTS

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



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

European **clothing**

is the most attractive product category to customers worldwide.

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

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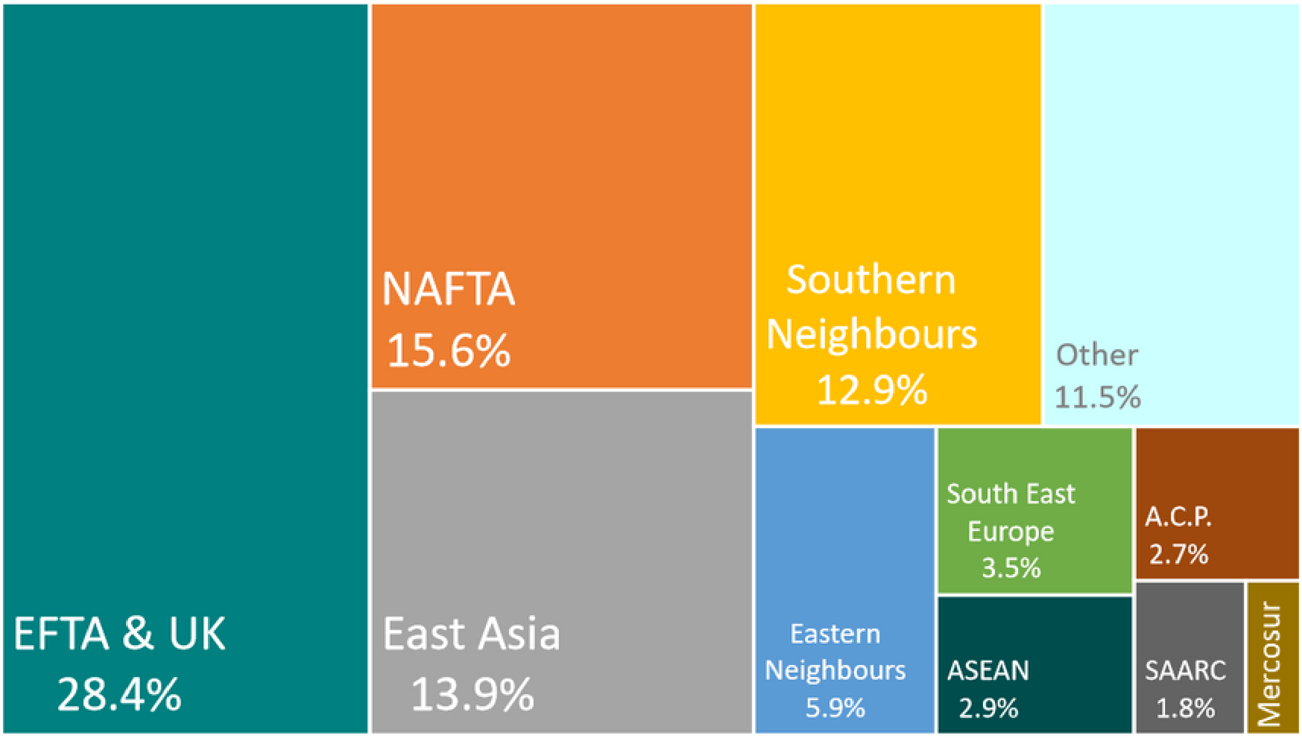
EU TRADE

MAIN REGIONS AND EU PARTNERS

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

Share of regions in total EU exports



LEGEND:

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

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SUSTAINABILITY

CIRCULAR ECONOMY

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

Technologies	Already using
Recycled materials	32,0%
Energy-saving technologies	27,8%
Recycling technologies	24,3%
Clean production	24,3%
Bio-based materials	23,3%
Renewable energies	18,0%
Biotechnology	8,3%
Additive manufacturing	6,8%
Carbon capture technologies	6,0%
Hydrogen	1.3%

32%

of the textile SMEs indicated the use of recycled materials *

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

42%

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

Source: European Commission
"Monitoring the twin transition of industrial ecosystems", DG Grow 2023

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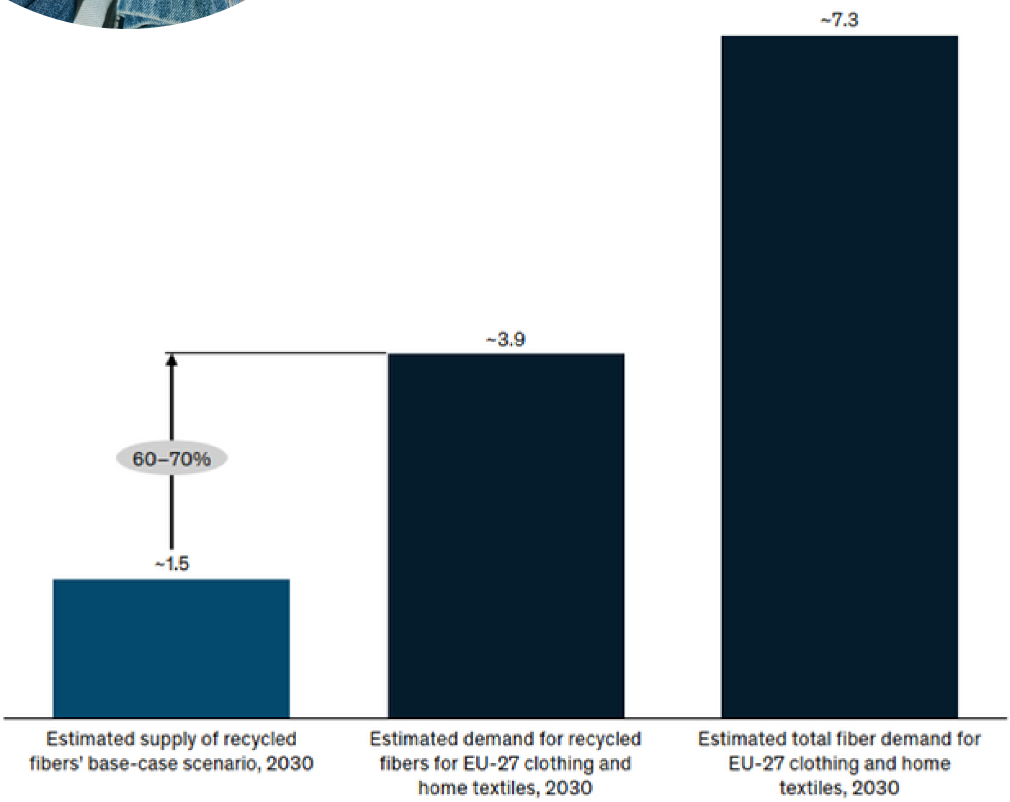
SUSTAINABILITY

CIRCULAR ECONOMY

“EU-27 AND SWITZERLAND COULD APPROACH A SUPPLY GAP OF 60 TO 70% FOR RECYCLED FIBERS BY 2030”

Estimated supply and demand of **recycled textile material** in tons[1], 2030.



1. Demand calculated based on European brand survey executives' ambition for recycled fiber uptake in 2025, extrapolated to 2030. Share applied to total textile waste volumes. Supply calculated based on this report's base-case scenario in which 50 percent of post-consumer household waste is calculated and 70 percent of textile waste available to recycling is fiber-to-fiber recycled.

Source:
“Scaling textile recycling in Europe-turning waste into value”, Mc Kinsey, 2022.

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SUSTAINABILITY

CIRCULAR ECONOMY

" AWARENESS ON THE RELEVANCE OF SUSTAINABILITY IS RISING AMONG CONSUMERS, BUT THERE IS A MISMATCH BETWEEN THEIR ATTITUDE, BEHAVIOUR, AND PERCEPTION"

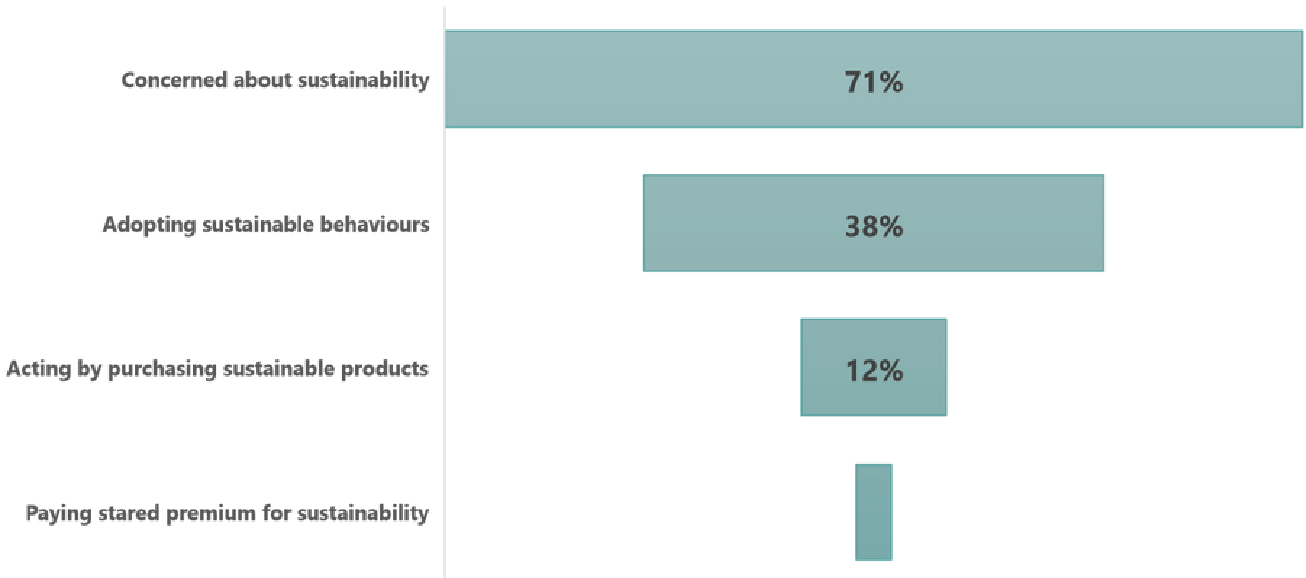
71%

of consumers say they are concerned about sustainability when purchasing apparel products, but only

3%

have paid a premium for more sustainable purchases

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



Source:
"Just Fashion Transition 2022", Venice sustainable fashion forum; based on BCG climate and sustainability consumer survey, 2022

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SUSTAINABILITY

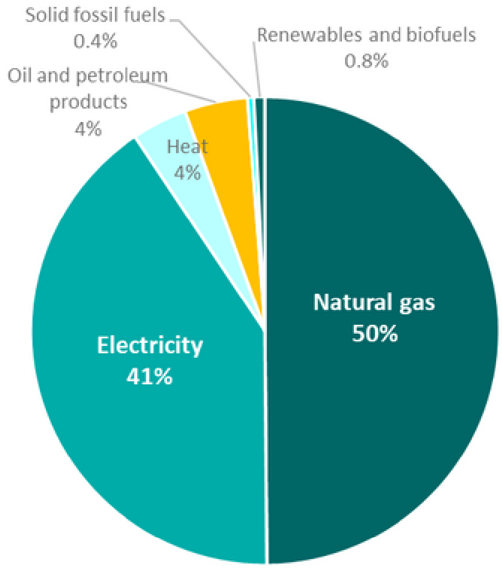
ENERGY

FINAL CONSUMPTION IN THE TEXTILE, CLOTHING AND LEATHEAR INDUSTRIES (TCLF)

Natural gas

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

Energy consumption in the TCLF* sector, by fuels

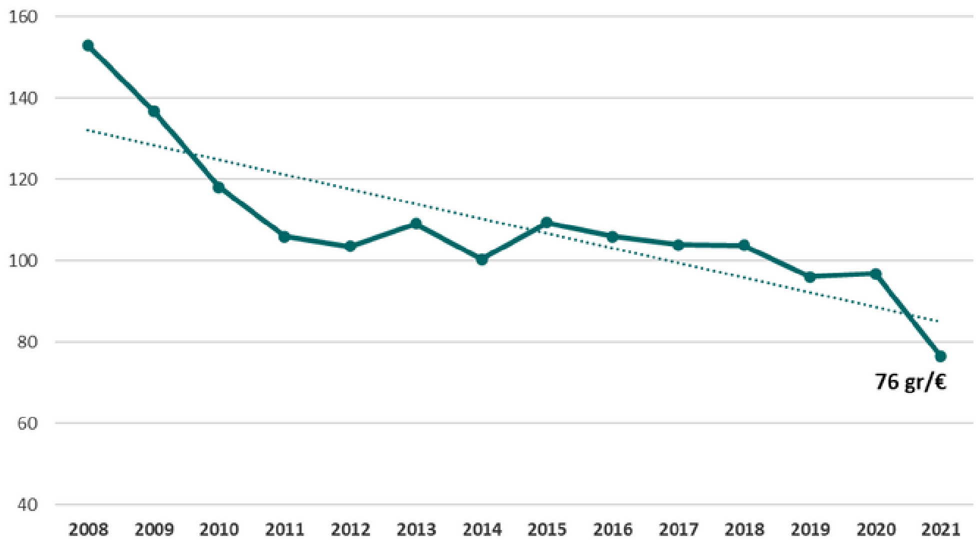


*TCL: Textile, Clothing, Leather and Footwear
Source:
EUROSTAT

AIR EMISSION CO2

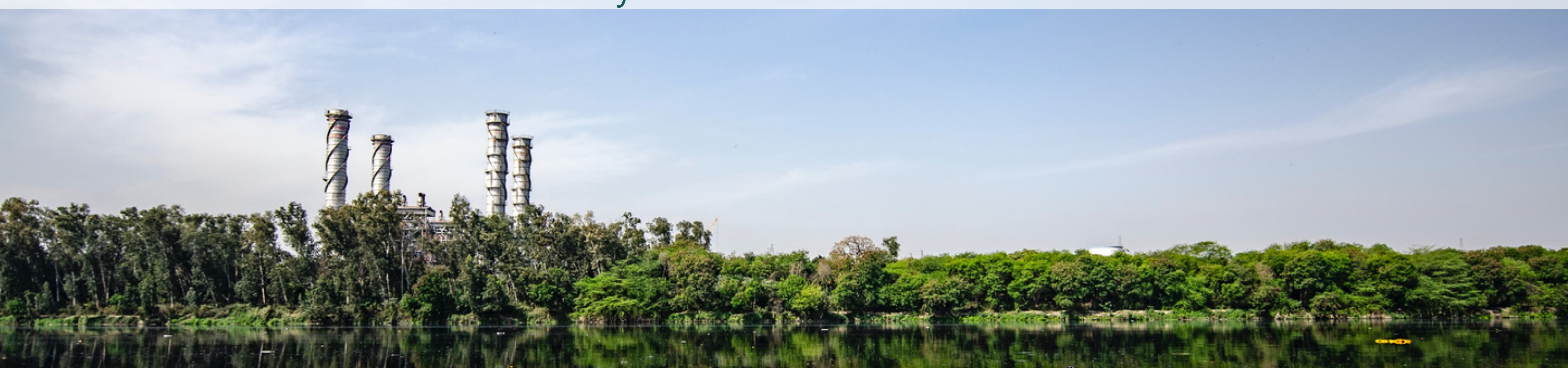
OUTSTANDING IN ENERGY EFFICIENCY: EVERY YEAR THE INDUSTRY USES LESS ENERGY, HENCE LESS CO2, WHILE INCREASING THE VALUE ADDED

Evolution of the CO2 emission intensity in the TCLF sectors*
2008-2021 (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

SUSTAINABILITY

RELEASED CERTIFICATES IN T&C

EXAMPLES OF INDUSTRY EFFORTS TO IMPROVE SUSTAINABILITY IN TEXTILE PRODUCTION

TEXTILE EXCHANGE

Certified sites* Δ 2023/22 (%)	Countries	Certifying bodies
74,500+	in 97	with 34
24%		

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

Textile Exchange is a global non-profit driving beneficial impacts on climate and nature across the fashion, textile, and apparel industry. They guide a growing community of brands, manufacturers, and farmers towards more purposeful production from the very start of the supply chain.

Source: Textile Exchange, 2024

OEKO-TEX

GLOBAL RELEASED CERTIFICATES *	STANDARD 100 Δ 2023/2022 (%)	ECO PASSPORT Δ 2023/2022 (%)
33,421	30,981	1,258
	13%	24%

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

** Total number of certificates issued by OEKO-TEX® including STANDARD 100, ECO PASSPORT, RESPONSIBLE BUSINESS, LEATHER STANDARD, ORGANIC COTTON, currently valid STeP certificates, but without MADE IN GREEN labels*

Source: OEKO-TEX 2024

BETTER COTTON

MEMBERS Δ 2022/21 (%)	NON-MEMBER BCP Suppliers	BETTER COTTON SOURCED Δ 2022/21 (%)
2,563	11,234	2.6 Mio Tons
+6.4%	+12.5%	+4%

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

Source: Better Cotton 2024

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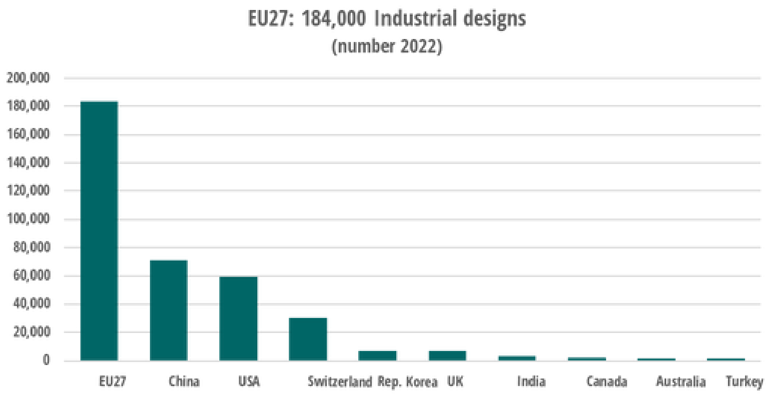
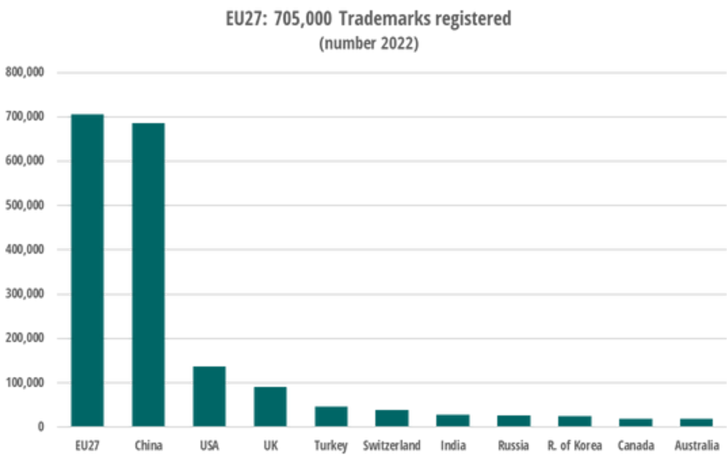
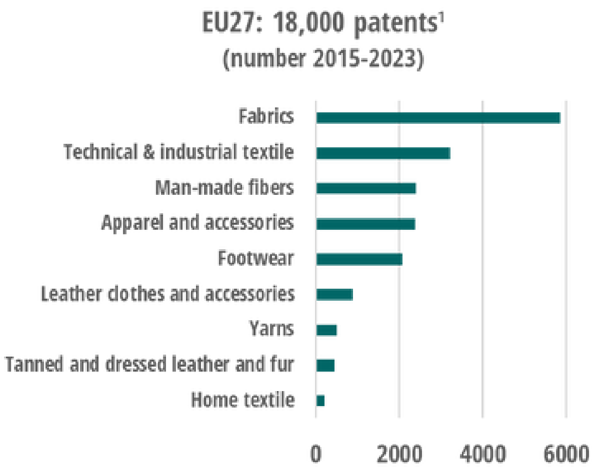
EUROPE – WORLD CAPITAL OF TEXTILE RESEARCH & INNOVATION

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







(1) The number of patents includes:

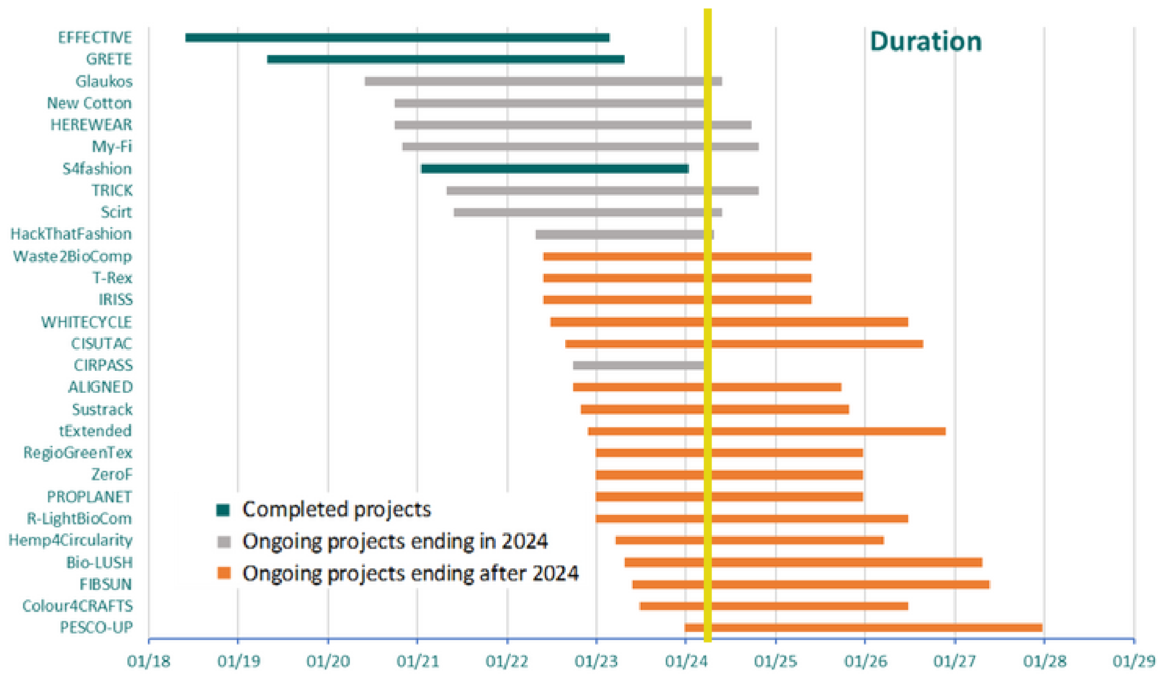
- *The 2022 and 2023 data are incomplete due to delays in patent registration.*
- *Both patents and utility models. The latter the prevalent form of IPR in the textile industry.*
- *All applications: both "granted" and only "non-granted" applications.*
- *The unit on which the statistics are made are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

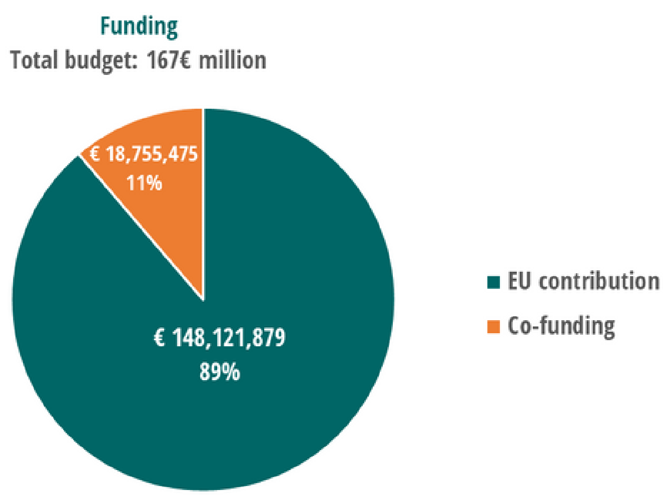
*TCLF : Textile, clothing, leather and footwear

Source: CSIL elaboration based on Orbis IP and WIPO IP Statistics Data Center.

EUROPE – HIGH LEVEL OF EU SUPPORT FOR RESEARCH & INNOVATION ON TEXTILE SUSTAINABILITY

"The Ecosystex member projects"





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

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