



# FACTS & KEY FIGURES

OF THE EUROPEAN TEXTILE  
AND CLOTHING INDUSTRY

2020  
EDITION

EURATEX



THE EUROPEAN APPAREL  
AND TEXTILE CONFEDERATION



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**2020**  
**EDITION**



THE EUROPEAN APPAREL  
AND TEXTILE CONFEDERATION

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# FOREWORD

EURATEX | THE VOICE OF THE EUROPEAN TEXTILE AND APPAREL INDUSTRY

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.



Alberto Paccanelli  
President

Dirk Vantghem  
Director General



# KEY FIGURES OF THE TEXTILE & CLOTHING INDUSTRY, 2019

# KEY FIGURES

2019 estimated



**BY SECTOR**

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

\* Include Man-made fibres

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



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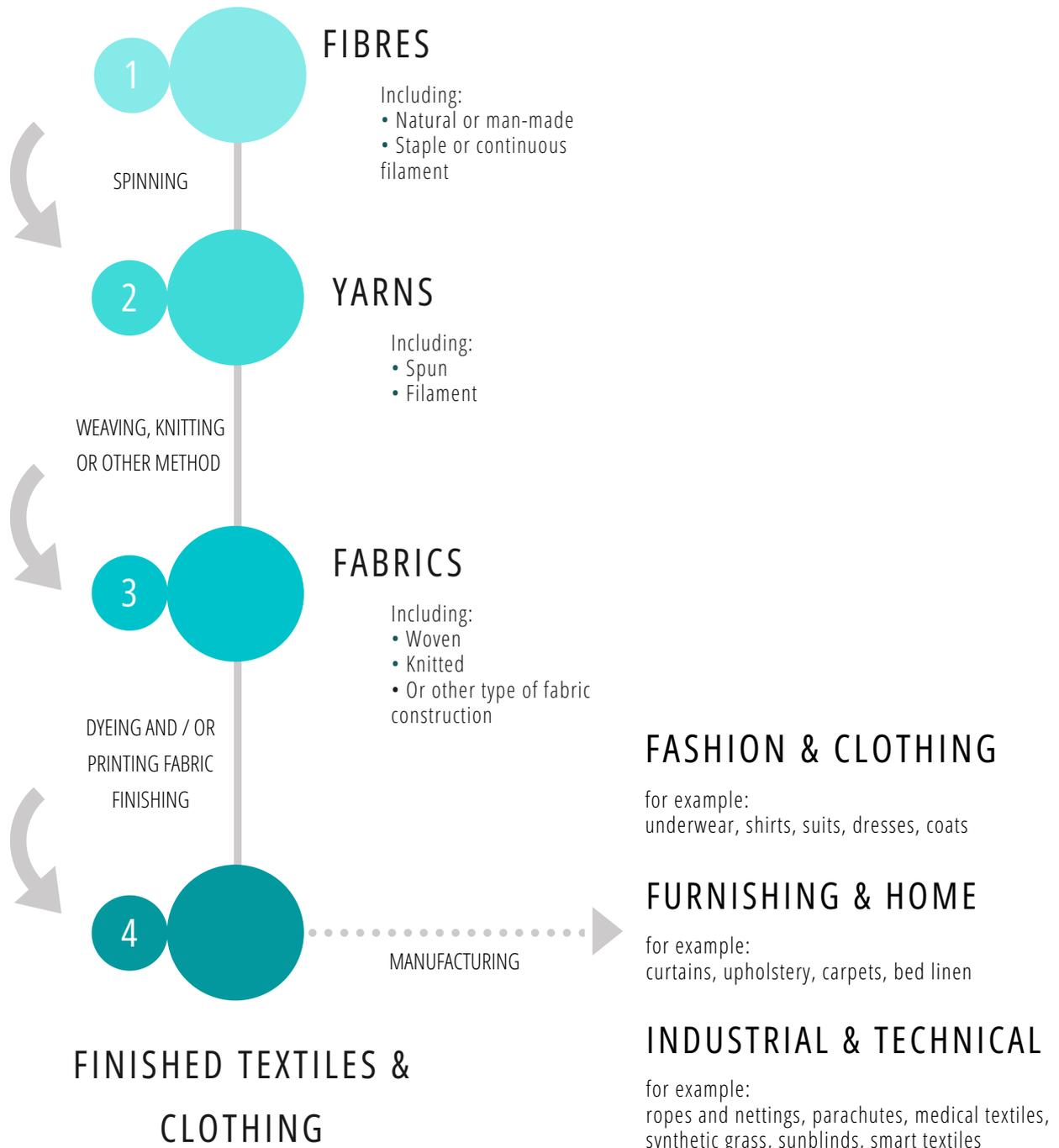
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## PROFILE

# THE TEXTILE MANUFACTURING PROCESS

A COMPLEX VALUE CHAIN AND DIVERSITY OF PRODUCT



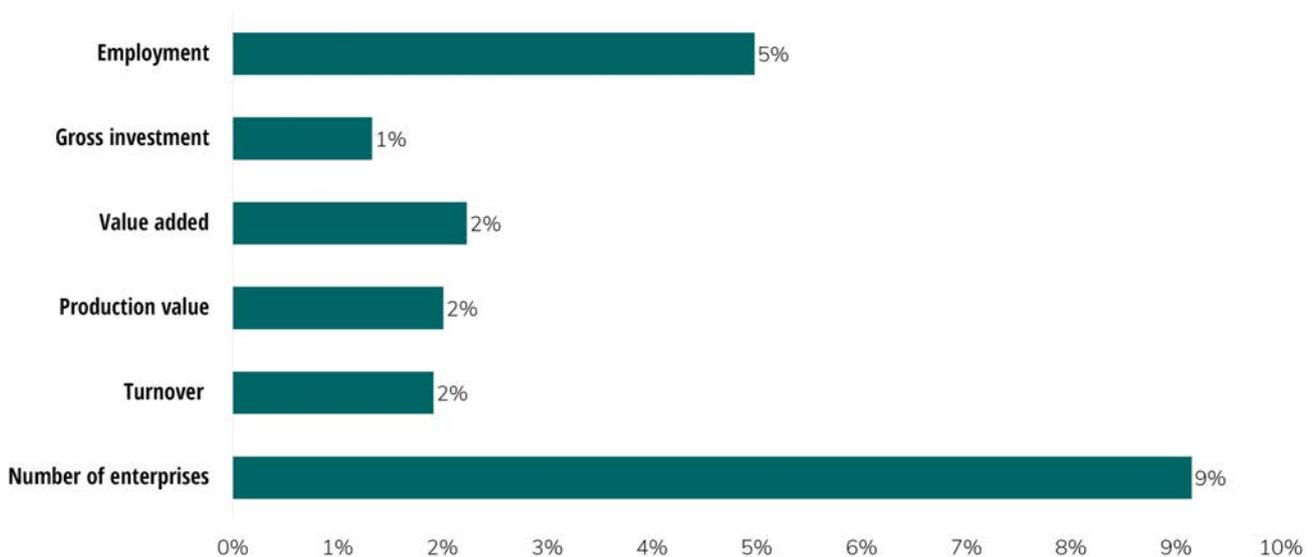
Source:  
EURATEX

## PROFILE

# 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



Unless specified, EU refers to EU27

Source:

EURATEX calculations, based on EUROSTAT data

## PROFILE

# COMPANIES IN THE T&C INDUSTRY

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

Size of Companies (number of employees)	Share (%)
Micro [0 - 9]	88.8%
Small and Medium sized Enterprises [10 - 249]	11.0%
Large > 250	0.2%

# 99.8 %

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

### Breakdown by sector



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

Unless specified, EU refers to EU27

Source:

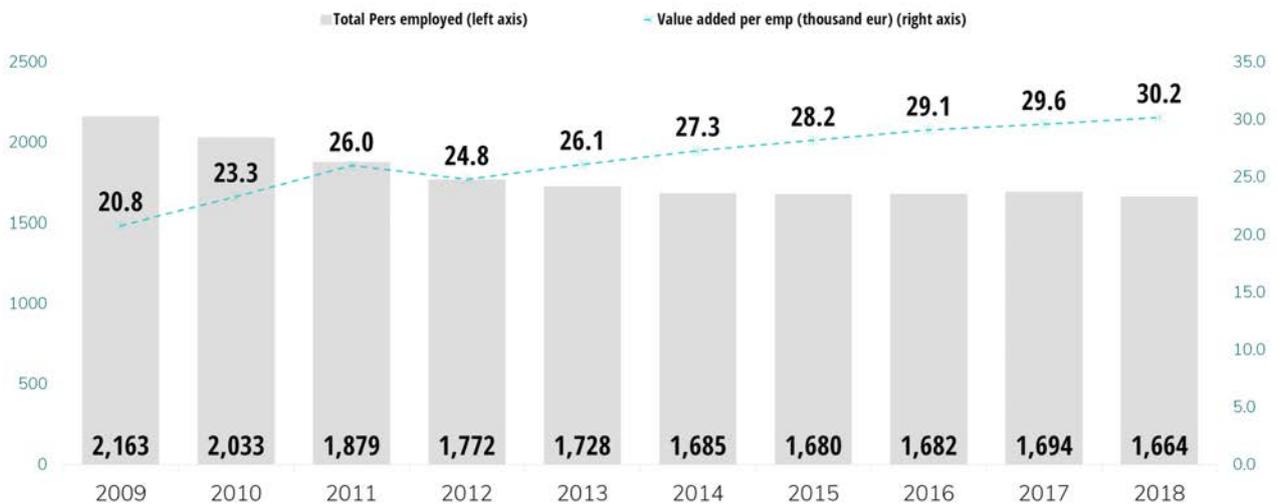
EURATEX calculations, based on EUROSTAT data

## PROFILE

# EMPLOYMENT AND PRODUCTIVITY PER EMPLOYEE

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

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



Data based on EU28

Source:

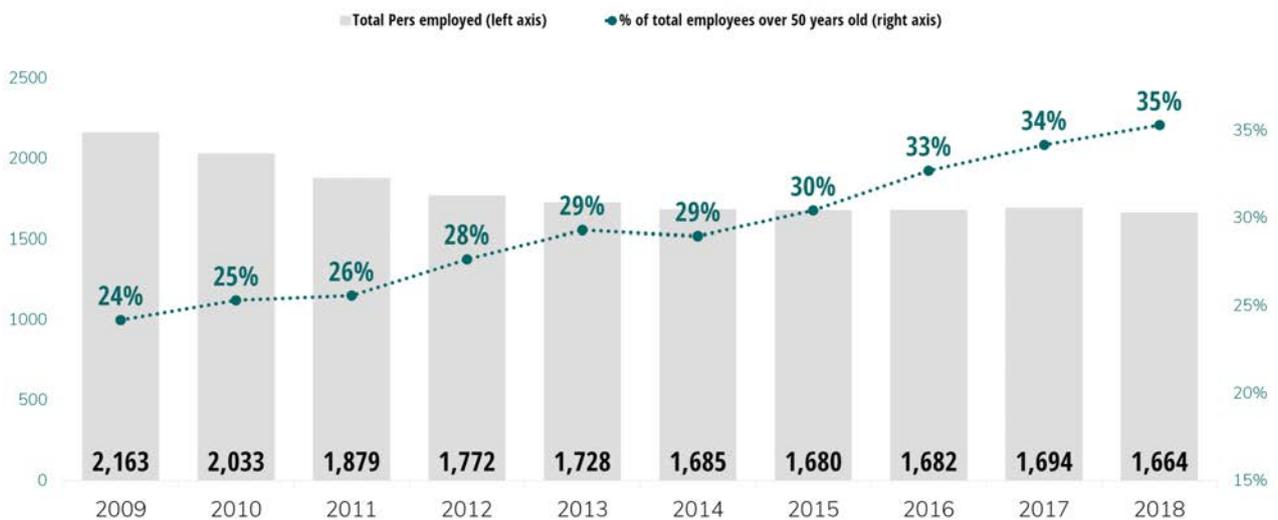
EURATEX based on members' data and EUROSTAT

## 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



Data based on EU28

Source:

EURATEX based on members' data and EUROSTAT

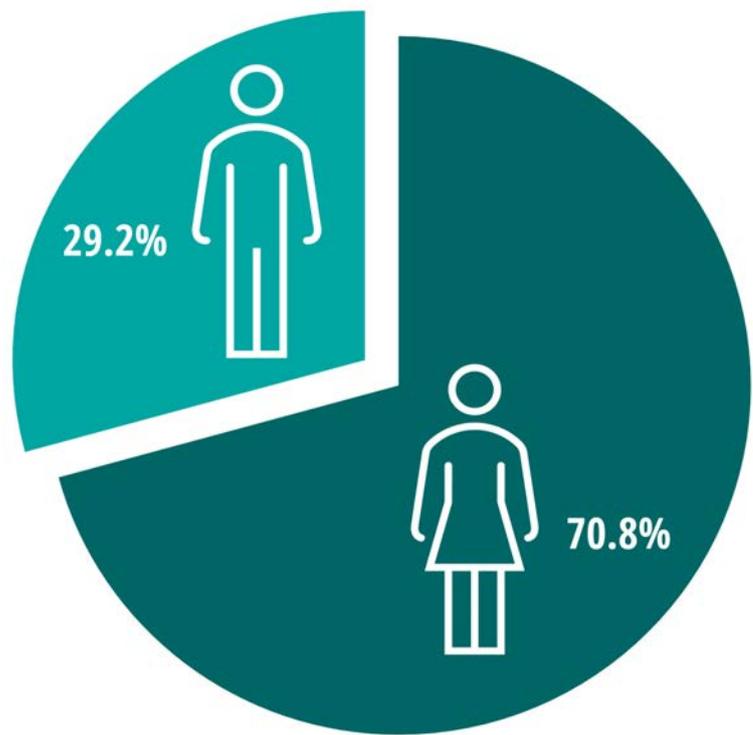
PROFILE

# EMPLOYMENT BY GENDER

WOMEN REPRESENT MORE THAN 70% OF ALL EMPLOYEES IN THE SECTOR



Employment by gender, 2018



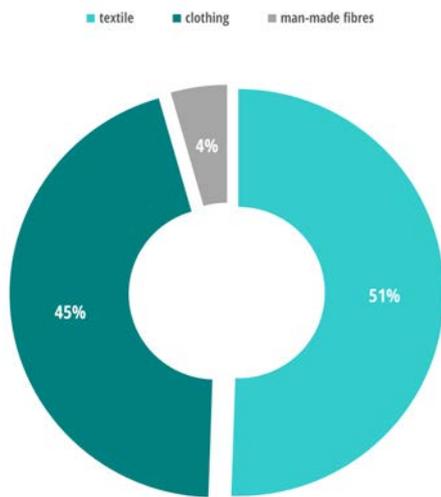
Unless specified, EU refers to EU27  
Source:  
EUROSTAT

# PROFILE

# TURNOVER AND EXPORTS

THE T&C INDUSTRY BECOMES MORE COMPETITIVE ON GLOBAL MARKETS

Share of turnover per sector, 2019e

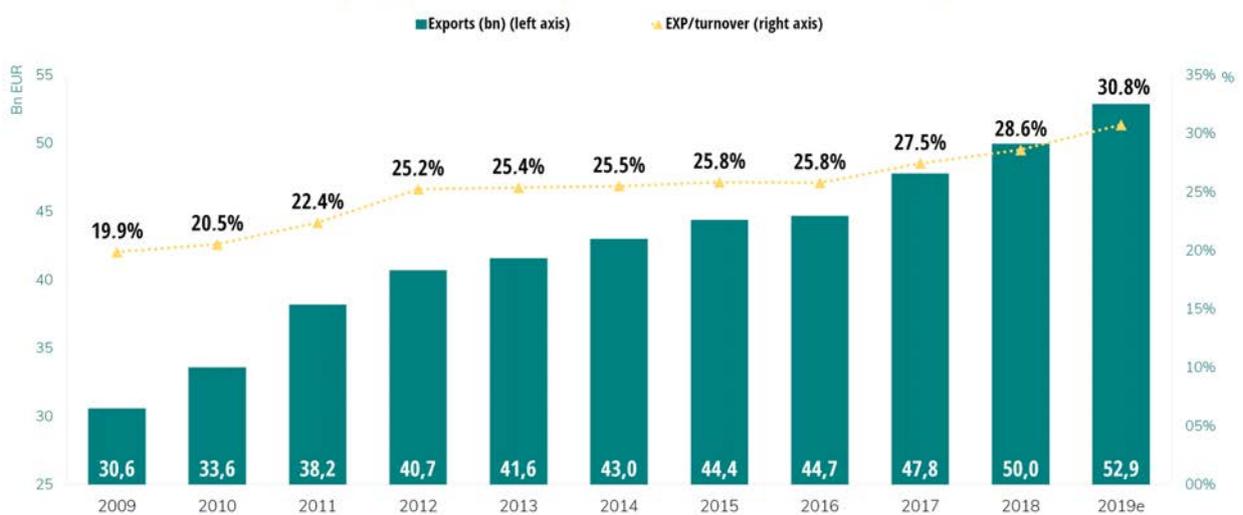


Textiles and man-made fibres represent 55% and clothing 45% of total T&C turnover:

**162 billion EUR**

(2019e)

EU28 yearly evolution of exports to turnover ratio in T&C industry



Unless specified, EU refers to EU27

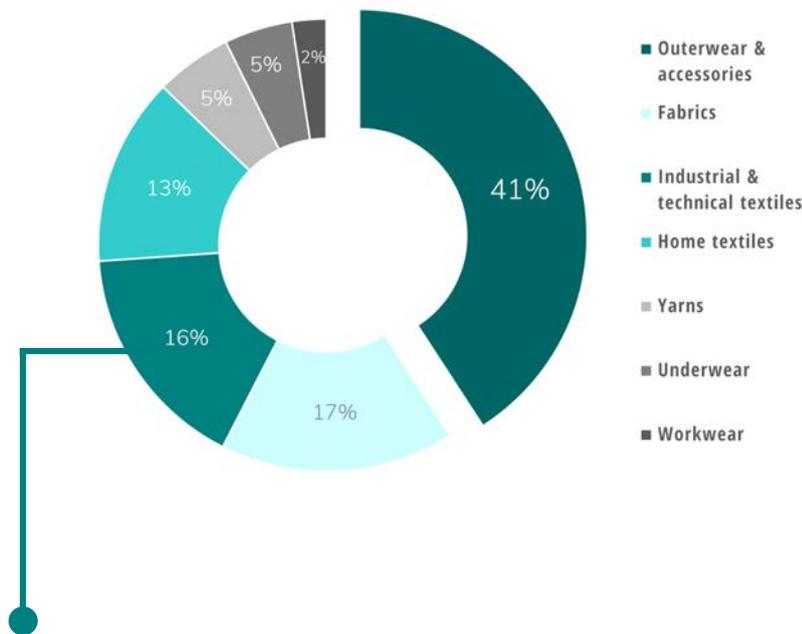
Source:

EURATEX calculations, based on EUROSTAT data

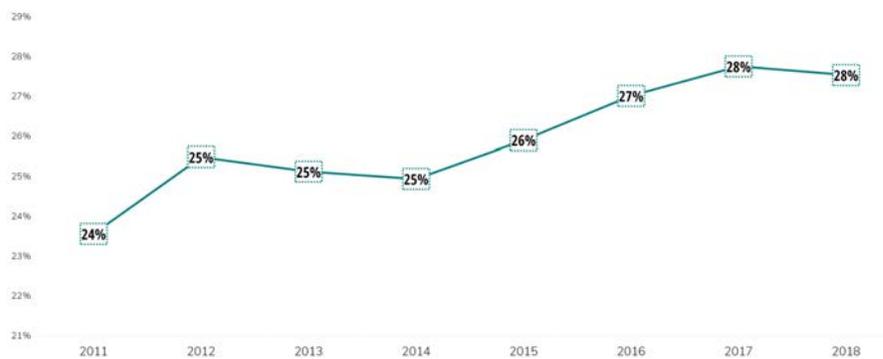
# PRODUCTION

THE CLOTHING MANUFACTURING IS THE MAIN CONTRIBUTOR TO THE TOTAL PRODUCTION AND TECHNICAL TEXTILES IS GROWING IN IMPORTANCE

## Production share by sub-sector, 2018



Share of technical textiles in total textile production, between 2011 and 2018



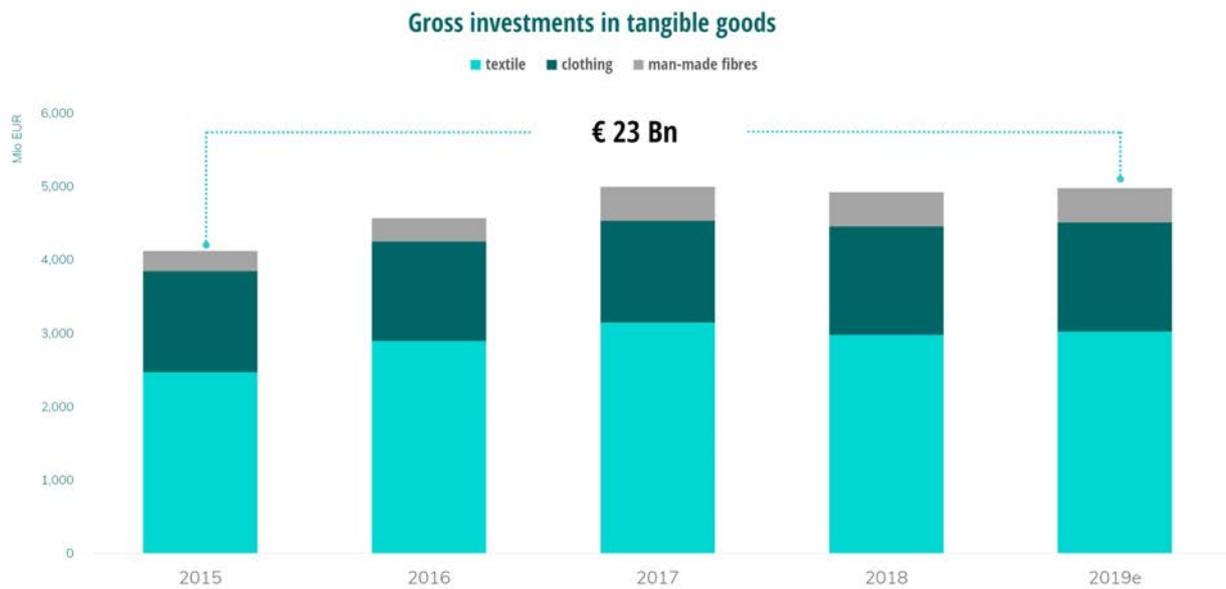
The sub-sector of technical textiles is one of the most dynamic, accounting for a growing share in the EU Textile production. Growing demand for technical textiles is based on applications in various industries such as healthcare, agriculture, construction, sportswear, automotive, etc...

Unless specified, EU refers to EU27  
Source:  
EUROSTAT

# PROFILE

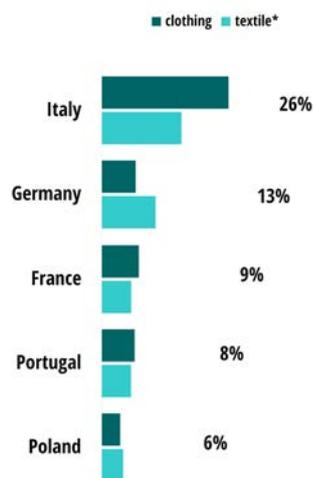
# INVESTMENTS

THE TEXTILE AND CLOTHING INDUSTRY CONTINUES TO INVEST IN ITS FUTURE



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.

Share of Investments by TOP 5 EU Member States broken down by sector, 2018



\* Textile include man-made fibres

In 2018,  
62% of total investment is  
made by the top 5 EU  
Member States.

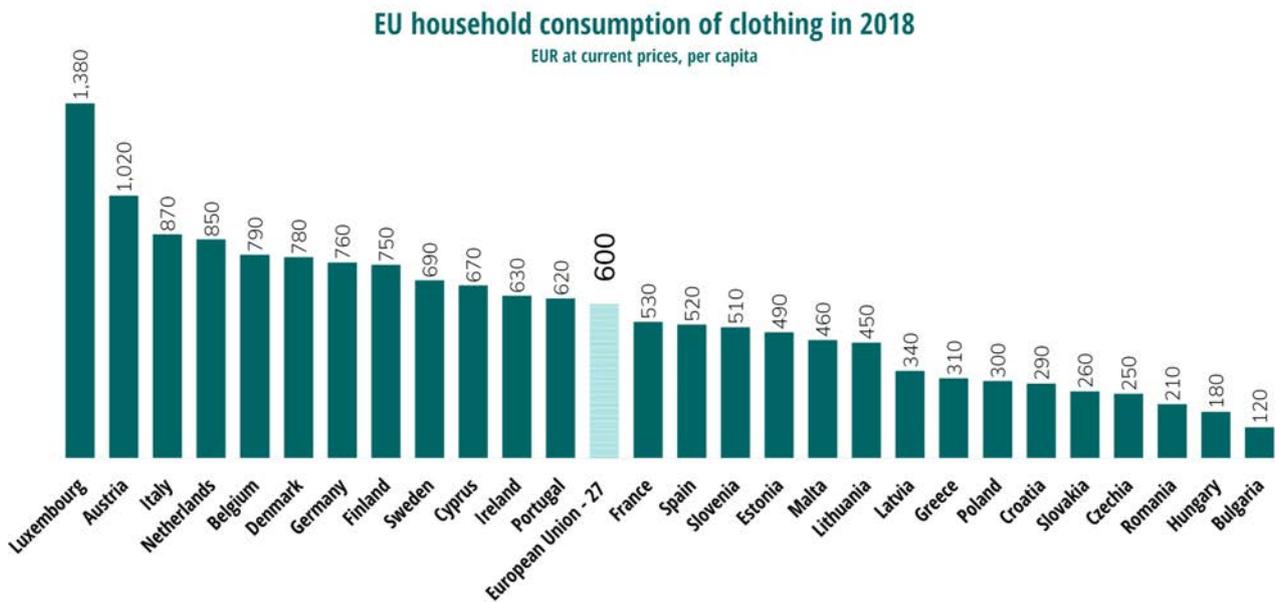
Unless specified, EU refers to EU27

Source:  
EUROSTAT

## PROFILE

# HOUSEHOLD CONSUMPTION

EU IS A KEY MARKET FOR FASHION



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.

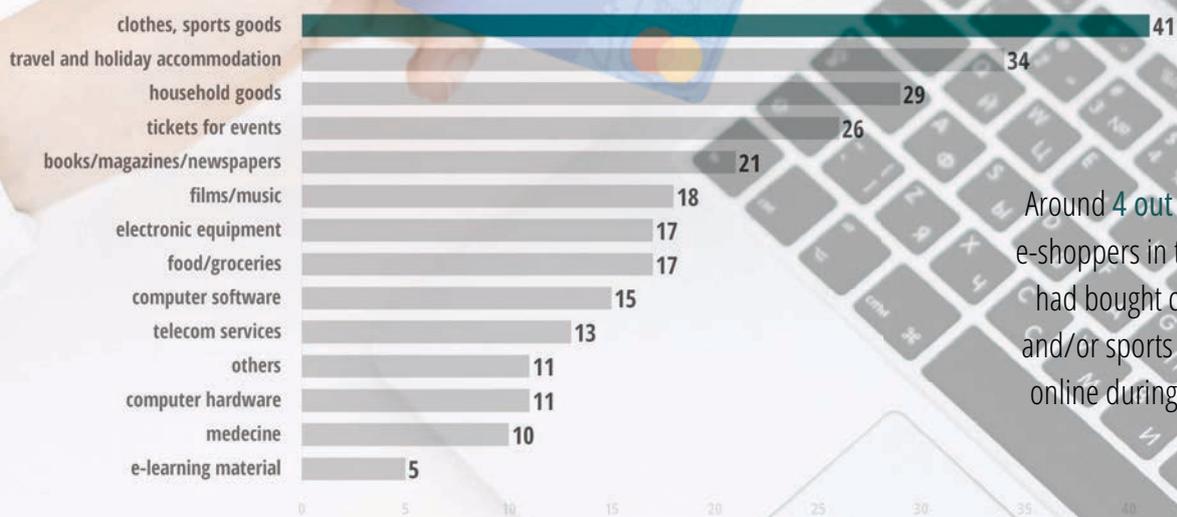
Unless specified, EU refers to EU27  
Source:  
EUROSTAT

# PROFILE

# E-COMMERCE

CLOTHING AND SPORTS GOODS: MOST POPULAR ONLINE PURCHASES BY E-SHOPPERS IN THE EU

Online purchases per product category\*



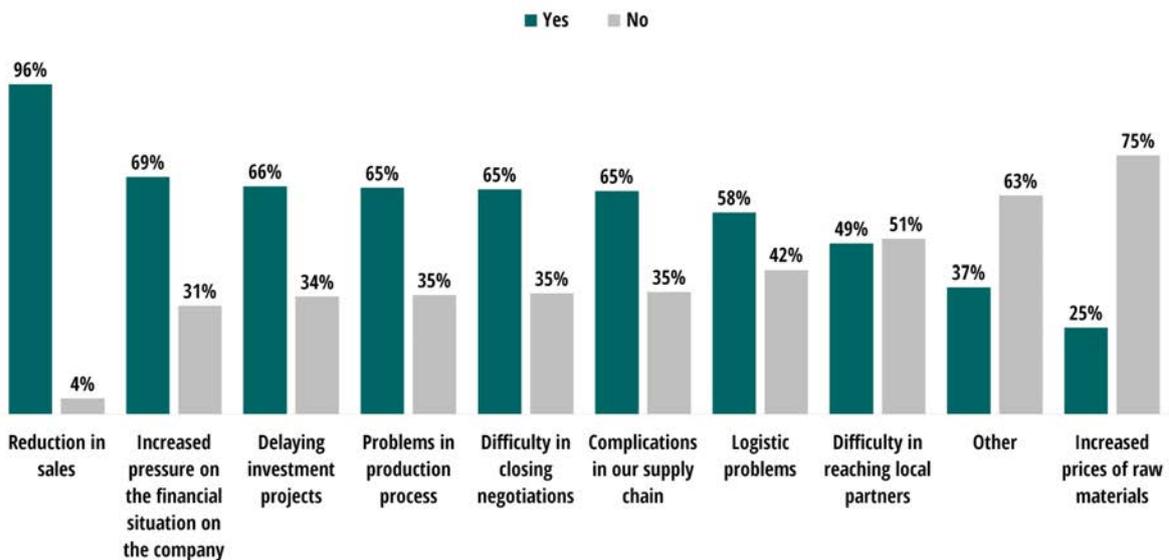
Around 4 out of 10 e-shoppers in the EU had bought clothes and/or sports goods online during 2019.

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

Unless specified, EU refers to EU27  
Source:  
EUROSTAT

# COVID19

Major concerns about the pandemic:



Estimated impact on turnover in 2020 for the T&C industry:



Strategic proposals for recovery:

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

Source:  
EURATEX coronavirus survey, April 2020

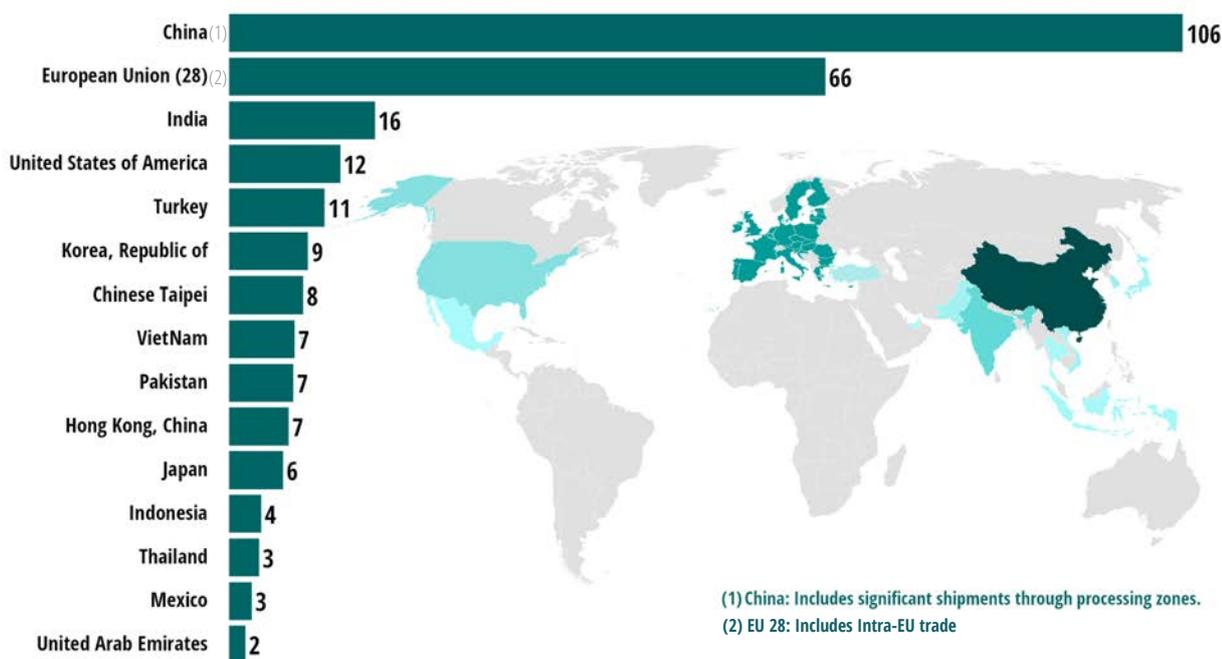
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# WORLD EXPORTS OF TEXTILES

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

TOP 15 textiles' exporters of the world  
Bn EUR

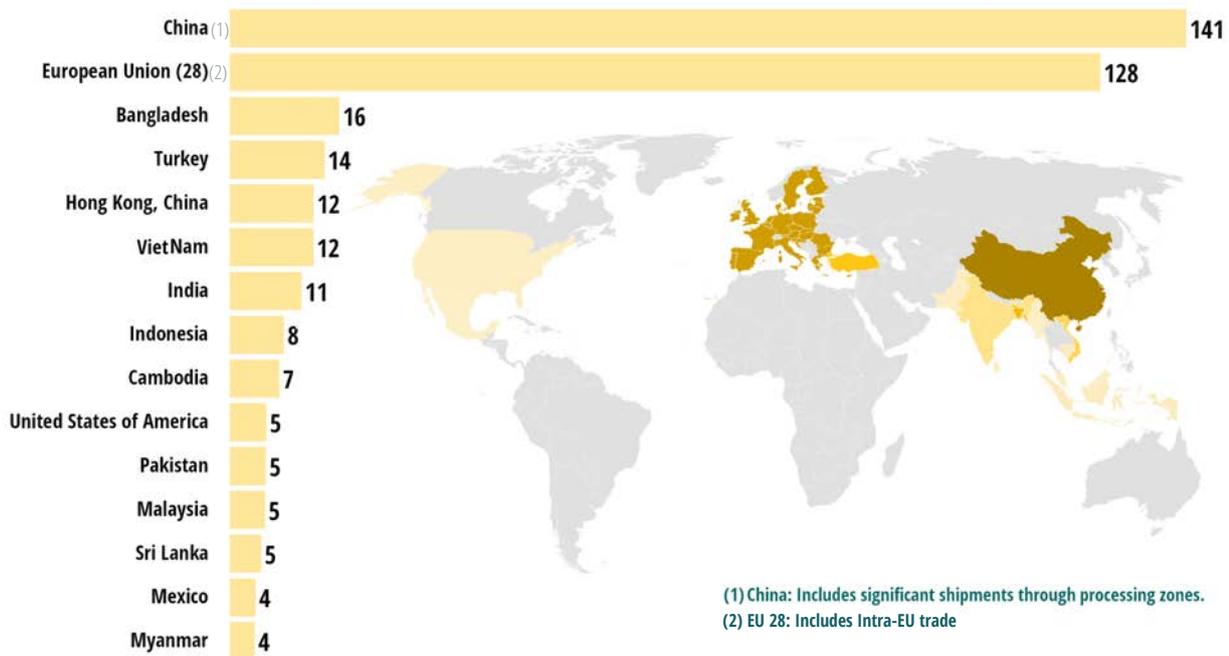


Data based on EU28  
Source:  
WTO

# WORLD EXPORTS OF CLOTHING

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

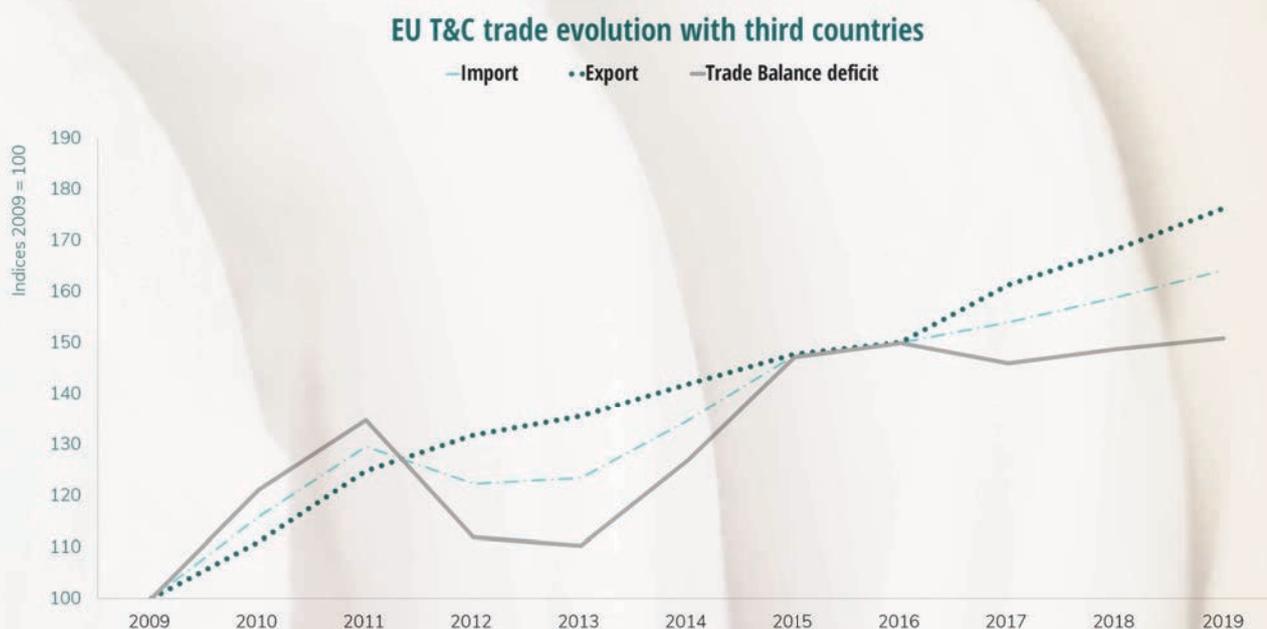
TOP 15 clothing' exporters of the world  
Bn EUR



Data based on EU28  
Source:  
WTO

# 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

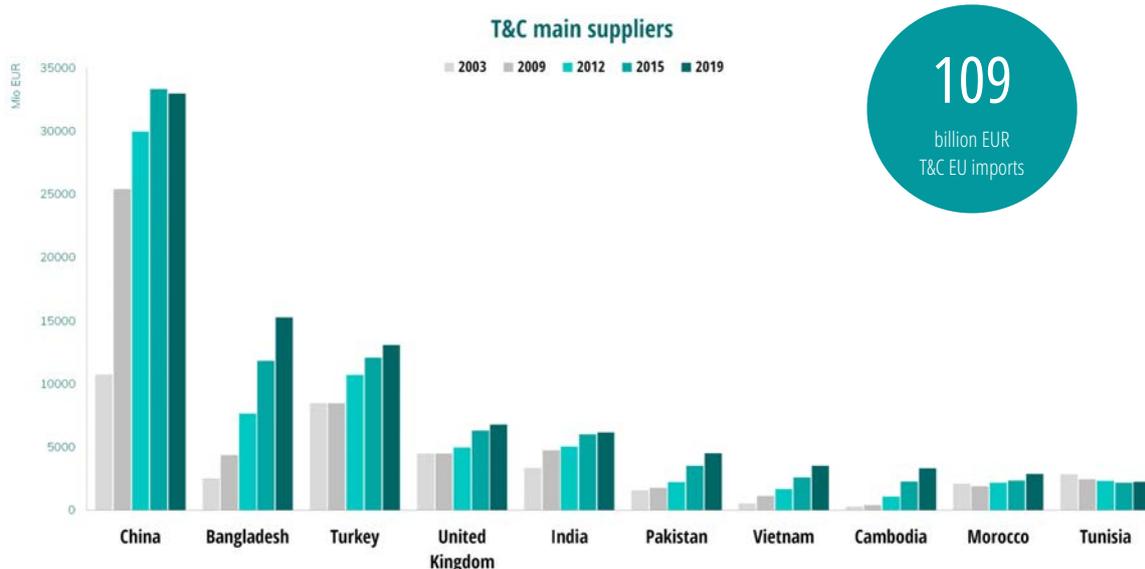


Unless specified, EU refers to EU27  
Source:  
EURATEX, based on IHS

# EU TRADE FLOWS BY MAIN PARTNERS

IN 2019, THE TOP 10 EU SUPPLIERS HAD A 83% SHARE IN TOTAL IMPORTS FROM THIRD COUNTRIES, AND THE TOP 10 EU CUSTOMERS ACCOUNTED FOR 69% OF THE TOTAL EXPORTS TO THIRD COUNTRIES.

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



## United Kingdom is the EU main export market



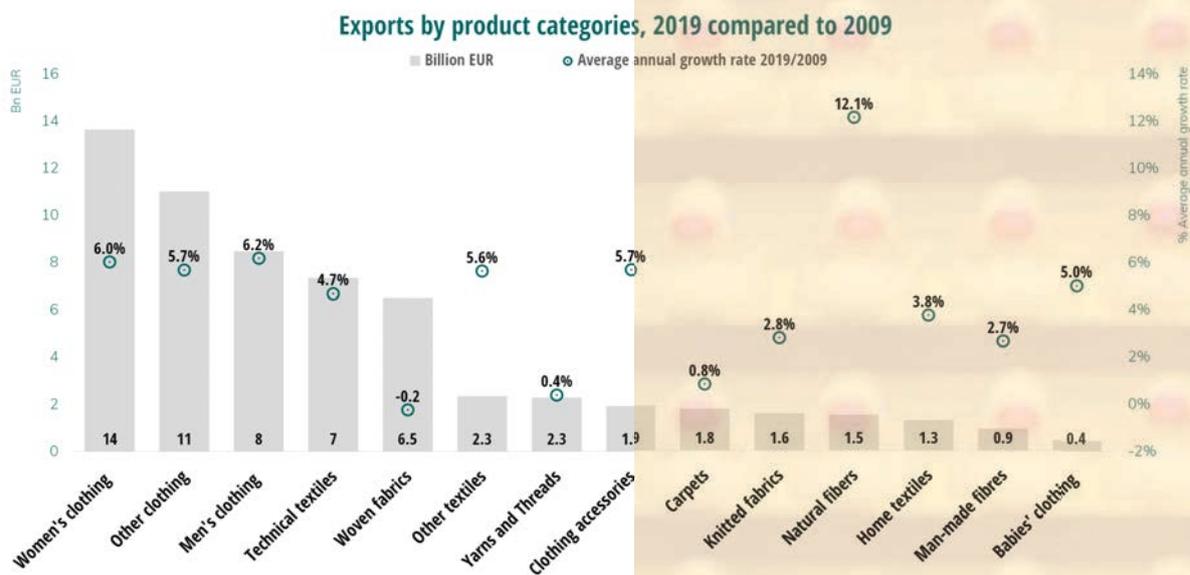
Unless specified, EU refers to EU27

Source:

EURATEX, based on IHS

# EU EXPORTS BY PRODUCT

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



European clothing (i.e. trousers, overcoats, pullovers, skirts and dresses) is the most attractive product category to customers worldwide.

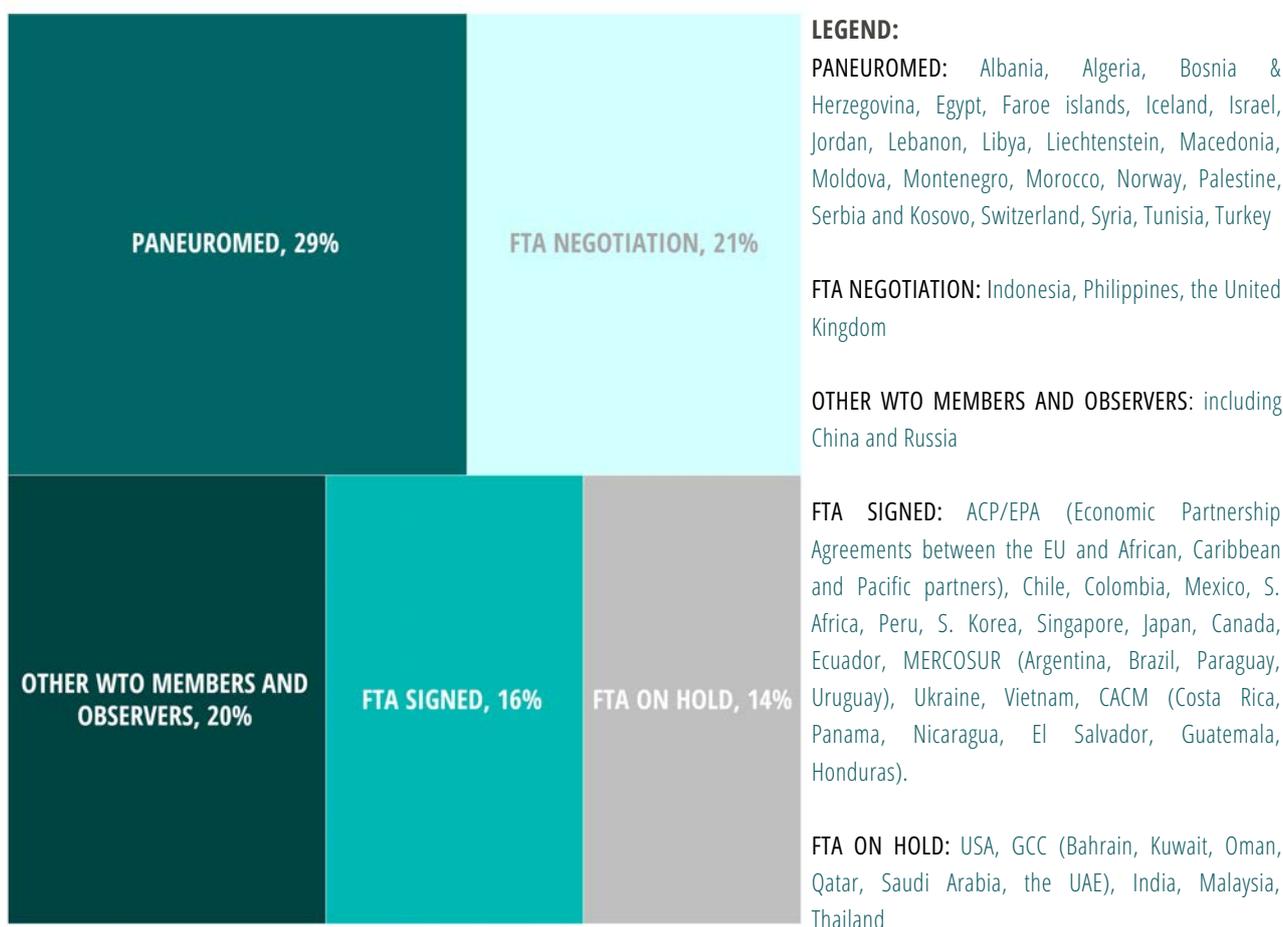
Unless specified, EU refers to EU27  
 Source:  
 EURATEX, based on IHS

# MAIN FTAs AND EU PARTNERS

THE EUROMED AREA IS A KEY DESTINATION FOR EU EXPORTERS

## T&C EXPORTS, IN 2019

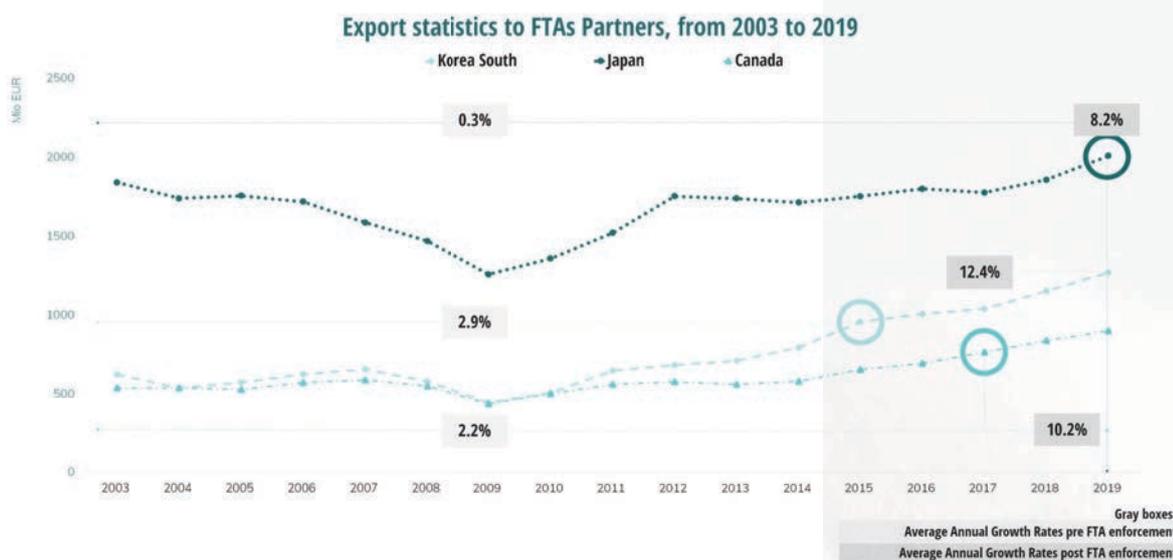
% Share



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

# FTA SUCCESS STORIES

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.

Unless specified, EU refers to EU27

Source:

EURATEX, based on IHS and European Commission (DG Trade)

# SUSTAINABILITY

Chemicals in T&C | 29

Air emission CO2 | 30

Circular economy | 31



## SUSTAINABILITY

# BEST USE OF CHEMICALS IN T&C

INDUSTRY CERTIFICATION INCREASED TO ENSURE SAFE USE OF CHEMICALS.  
THREE EXAMPLES OF THE LARGEST PROGRAMMES.

### 1 BLUESIGN



*BLUESIGN is a holistic system that provides solutions in sustainable processing and manufacturing to industries and brands.*

Source: Bluesign 2019

### 2 ZDHC



*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 use 30% of the total Oeko Tex certificates in spite of representing only 7% of world population.

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

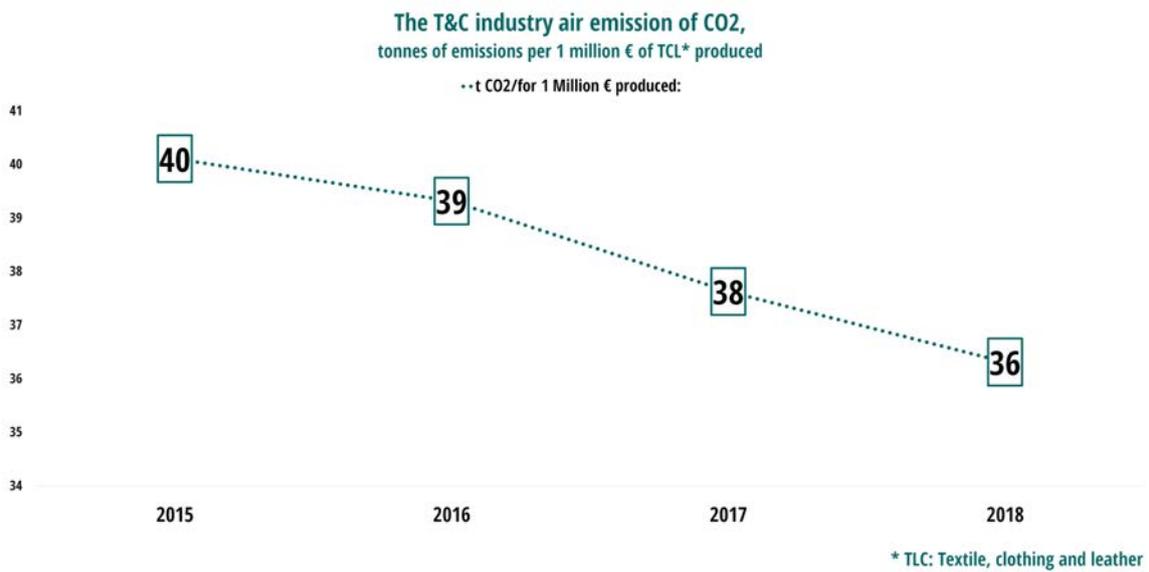
Source: OEKO Tex 2019

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Source:  
EURATEX

## SUSTAINABILITY

# OUTSTANDING IN ENERGY EFFICIENCY

EVERY YEAR THE INDUSTRY USES LESS ENERGY, HENCE LESS CO<sub>2</sub>, TO MAKE THE SAME AMOUNT OF PRODUCTS



Energy efficiency is of critical importance for the textile and clothing industry and to reduce CO<sub>2</sub> emissions.

Unless specified, EU refers to EU27  
Source:  
EUROSTAT

## SUSTAINABILITY

# MAKING CIRCULAR ECONOMY HAPPEN

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



### 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.circularity.eu/project/sedacor](http://www.circularity.eu/project/sedacor)

### 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.

Source: [www.circularity.eu/project/reblend-circular-fabrics-fashion](http://www.circularity.eu/project/reblend-circular-fabrics-fashion)



### 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.circularity.eu/project/schijvens](http://www.circularity.eu/project/schijvens)



Unless specified, EU refers to EU27

Source:  
EURATEX

# INNOVATION

EUROPE: world capital of textile research, innovation & higher education | 33

Smart, digital & bio-based | 34

Smart textiles | 35

## INNOVATION

# 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



**40** Textile research and technology centres

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



**50** Textile departments at Technical Universities

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



**80** Universities of applied sciences and fashion colleges

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



**15** Textile innovation clusters

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

# INNOVATION

## SMART, DIGITAL & BIO-BASED

KEY INNOVATION AREAS FOR THE TEXTILE AND CLOTHING INDUSTRY OF THE FUTURE.

### 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.



Source: Textile+mode  
ITA Institut für Textiltechnik of RWTH Aachen University

### 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.



Source: Textile+mode  
ITA Institut für Textiltechnik of RWTH Aachen University  
Example:  
"an automotive door lining-material: a biodegradable thermoplastic composite made of natural fibers and PLA"

Source:  
EURATEX | Textile+mode | ITA - Institut für Textiltechnik of RWTH Aachen University

## INNOVATION

# SMART TEXTILES

THE DEVELOPMENT OF ELECTRONIC TEXTILES AND SMART WEARABLES IS BOOMING.

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.

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Source:  
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