



FACTS & KEY FIGURES 2022

OF THE EUROPEAN TEXTILE
AND CLOTHING INDUSTRY

2022

EDITION

EURATEX





THE EUROPEAN APPAREL
AND TEXTILE CONFEDERATION



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2022
EDITION



THE EUROPEAN APPAREL
AND TEXTILE CONFEDERATION

CONTENTS

EURATEX | THE VOICE OF THE EUROPEAN TEXTILE AND APPAREL INDUSTRY

04

06

07

18

24

Foreword

Key figures of the Textile & Clothing industry

Profile

The textile manufacturing process	07	Turnover and exports	12
Member States share in total EU	08	Production	13
Companies in the T&C industry	09	Investments	14
Employment	10	Household consumption	15
productivity per employee	10	E-commerce	16
by age and by gender	11	Covid-19	17

EU trade

World exports	18	EU exports by products	22
of textiles	18	Free Trade Agreements (FTA)	23
of clothing	19	Main FTAs and EU partners	23
EU trade flows: imports, exports	20		
EU trade flows by main partners	21		
by suppliers	21		
by customers	21		

Sustainability & Innovation

Circular economy	24
textile waste	24
recycled materials	25
consumer demand	26
Energy	27
Air emission CO ₂	28
emission intensity	28
emission intensity, sectors	29
Chemicals in T&C	30
Europe: World capital of textile research, & innovation	32

FOREWORD

EURATEX | THE VOICE OF THE EUROPEAN TEXTILE AND APPAREL INDUSTRY

On 30 March 2022, the European Commission has presented its vision for the European textile industry: moving towards a circular business model, full focus on sustainability and transparency, but also looking at the resilience of our sector in a global competitive environment.

In the coming 2-3 years, this vision needs to be translated into concrete legislation and action plans; a new regulatory framework will be created. This can only be done with a solid understanding of the industry's profile; policies must be fact- and science-based.

This 2022 Facts and Key Figures publication is therefore a useful tool for policy makers and other stakeholders, to get a better understanding of how the European textile and clothing industry is organised, which products are made, our trade performance, our move towards more sustainability.

A better understanding of the industry will help to shape a better policy framework, but also help consumers to appreciate the value proposition of European textile and apparel companies. This publication should contribute to this process.



Alberto Paccanelli
President

Dirk Vantghem
Director General

KEY FIGURES OF THE TEXTILE & CLOTHING INDUSTRY, 2021



KEY FIGURES

2021 estimated



BY SECTOR

2021e	UNIT	TEXTILE*	Clothing
Turnover	billion €	81.6	65.3
Value Added	billion €	24.6	19.7
Companies	number	48,343	94,591
Employment	number	537,482	760,637
Exports	billion €	25	33
Imports	billion €	34	72
Trade Balance	billion €	-9	-39

* Include Man-made fibres

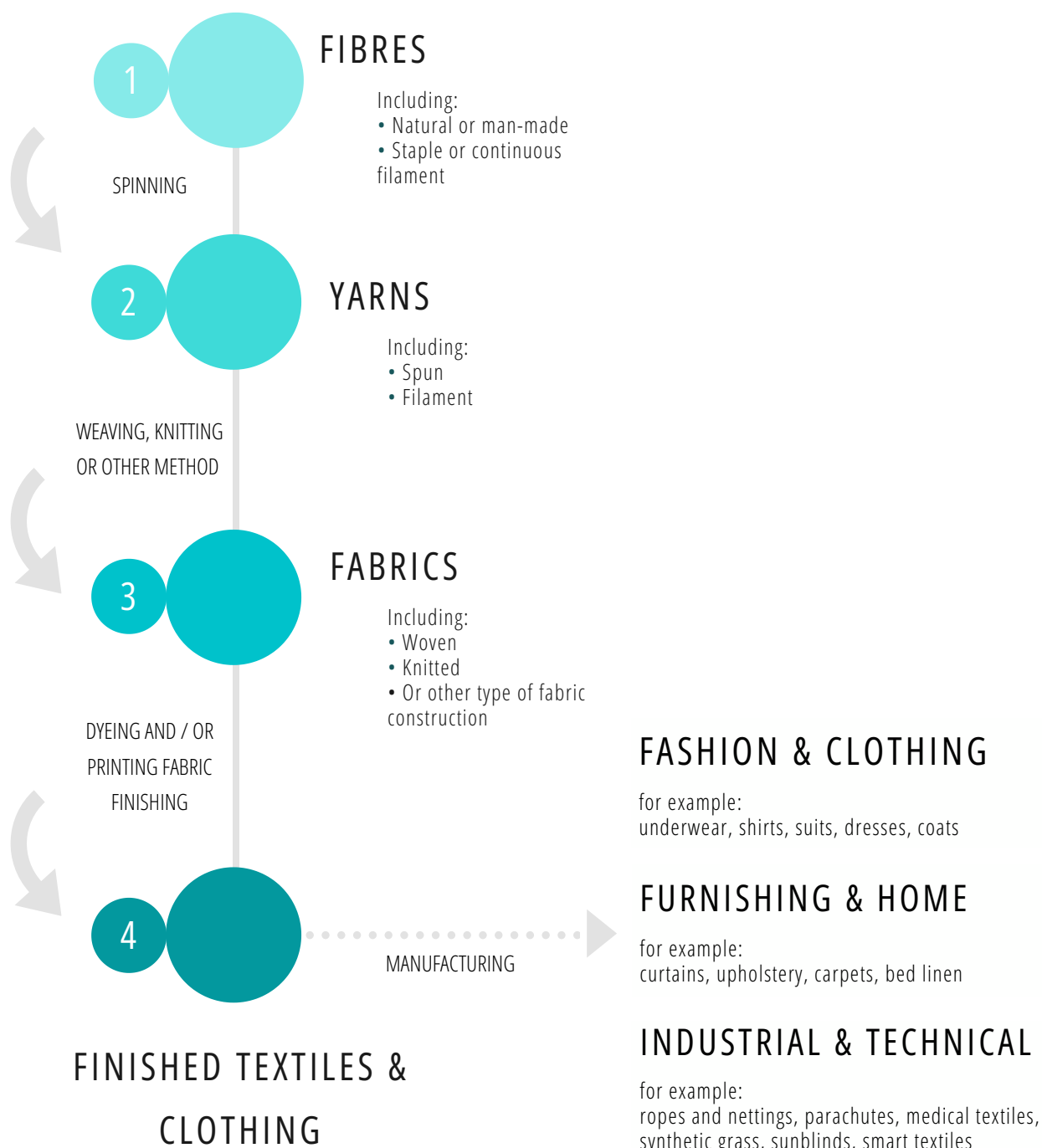
Data based on UE27, 2021 estimates (*investments, 2019)
Numbers in white circles show the 2021/2020 percentage change
Source: EURATEX, based on EUROSTAT



PROFILE

THE TEXTILE MANUFACTURING PROCESS

A COMPLEX VALUE CHAIN AND DIVERSITY OF PRODUCT

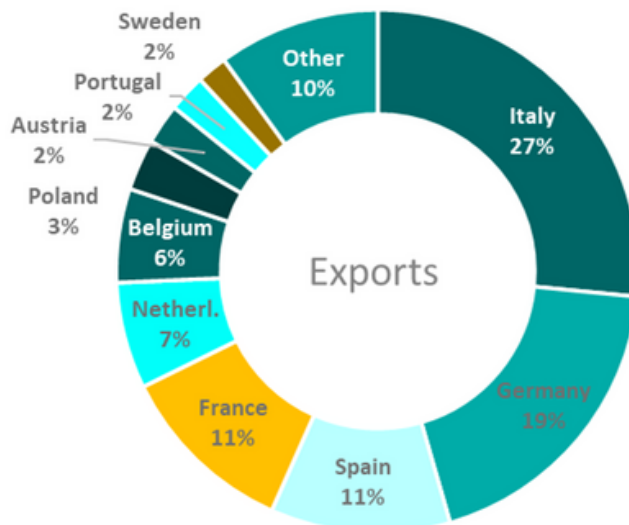
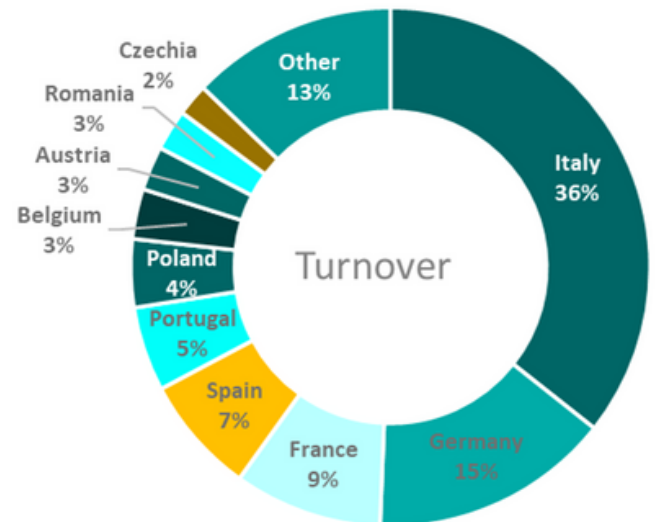
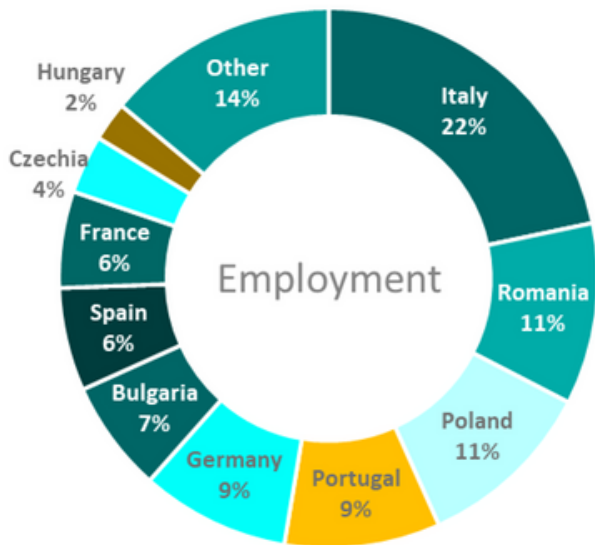


Source:
EURATEX

PROFILE

MEMBER STATE SHARES 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 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%
---	-------

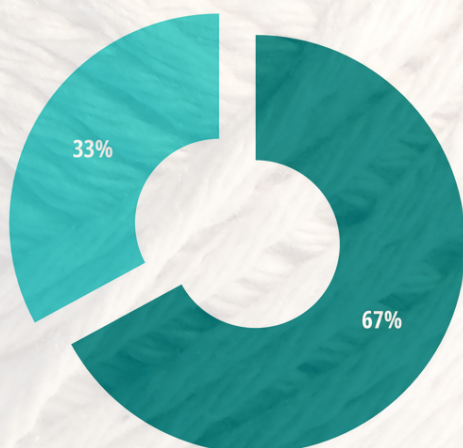
Large > 250	0.2%
-------------	------

99.8 %

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

Breakdown by sector

■ CLOTHING ■ TEXTILE



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

Unless specified, EU refers to EU27

Source:

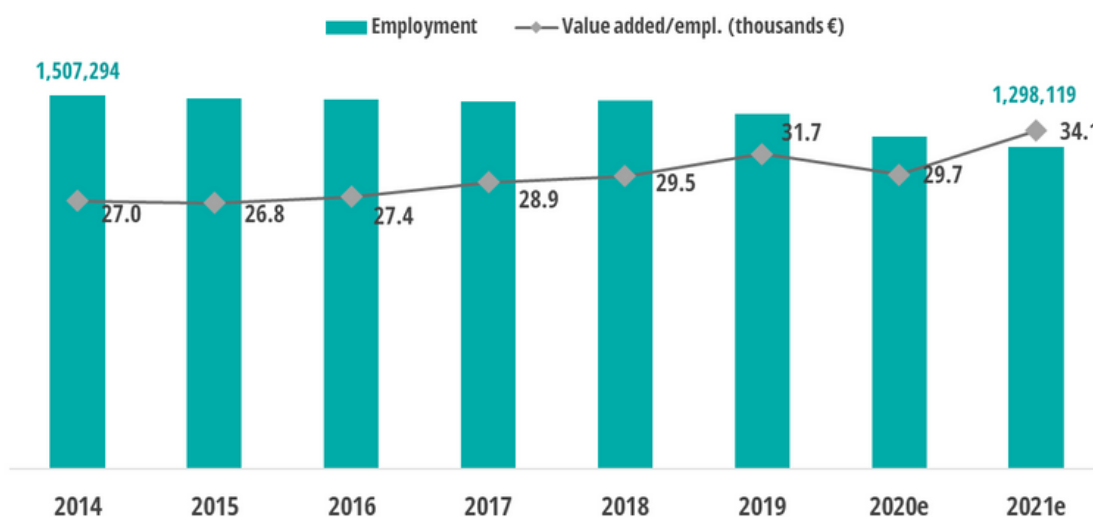
EURATEX calculations, based on EUROSTAT data

PROFILE

EMPLOYMENT AND PRODUCTIVITY PER EMPLOYEE

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

EU-27 | Evolution of labour force and labour productivity in T&C industries between 2014 and 2021



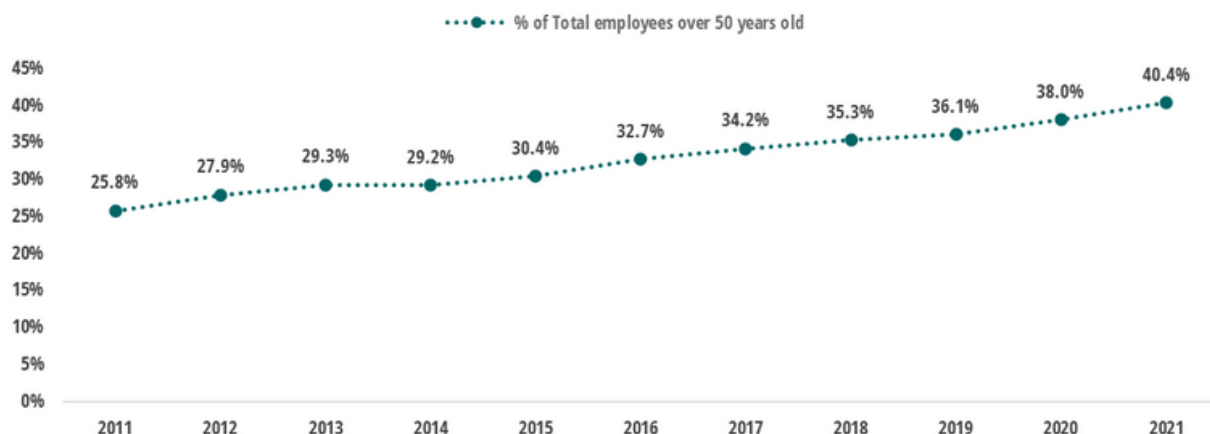
Source:
EURATEX based on members' data and EUROSTAT

PROFILE

EMPLOYMENT BY AGE AND BY GENDER

AGEING: AN ADDITIONAL OPPORTUNITY FOR ENTERPRISES TO CREATE NEW JOBS

EU-27 | Evolution of workers over 50 in T&C between 2011 and 2021

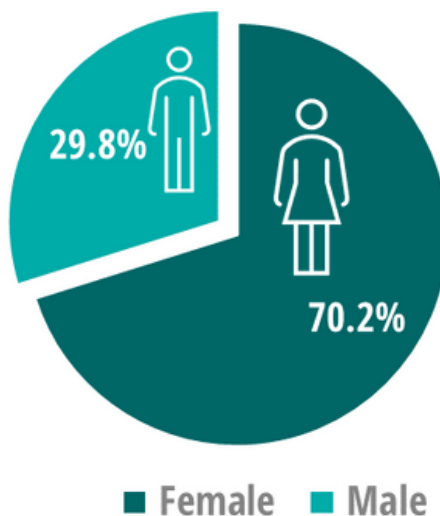


Women represent more than

70%

of all employees
in the sector.

Employment by Gender 2021

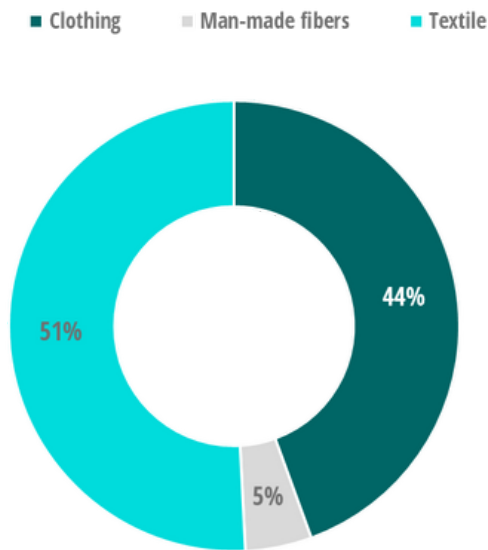


Source:
EURATEX based on members' data and EUROSTAT

TURNOVER AND EXPORTS

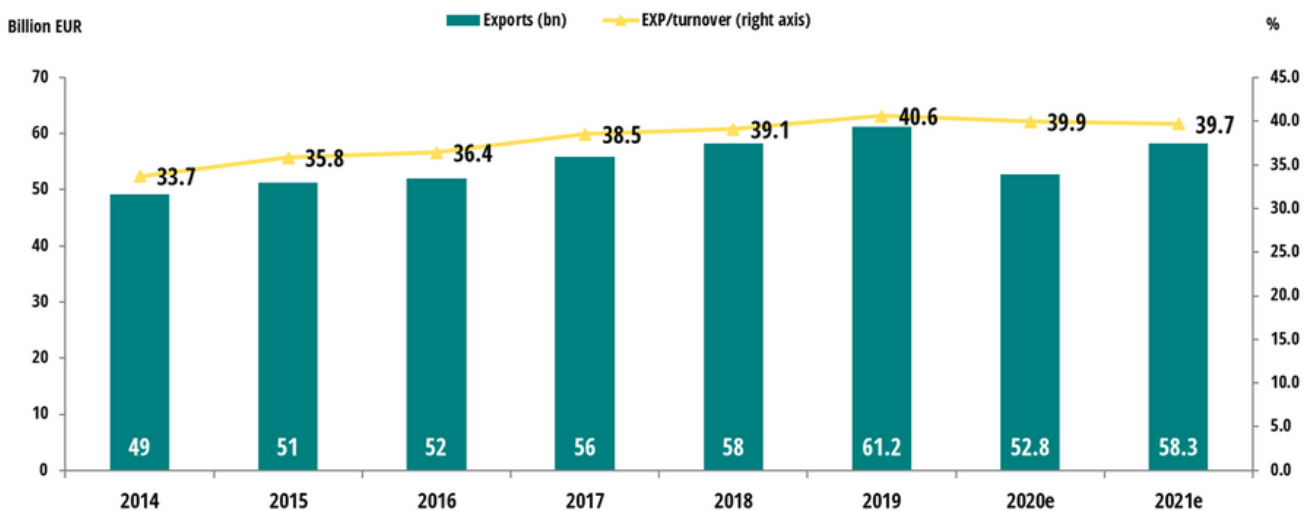
THE T&C INDUSTRY BECOMES MORE COMPETITIVE ON GLOBAL MARKETS

Share of turnover per Sub-sector, 2021e



Textiles and man-made fibres represent 56% and clothing 44% of total T&C turnover:
147 billion EUR
 (2021e)

EU27 yearly evolution of exports to turnover ratio in T&C industry



Unless specified, EU refers to EU27

Source:

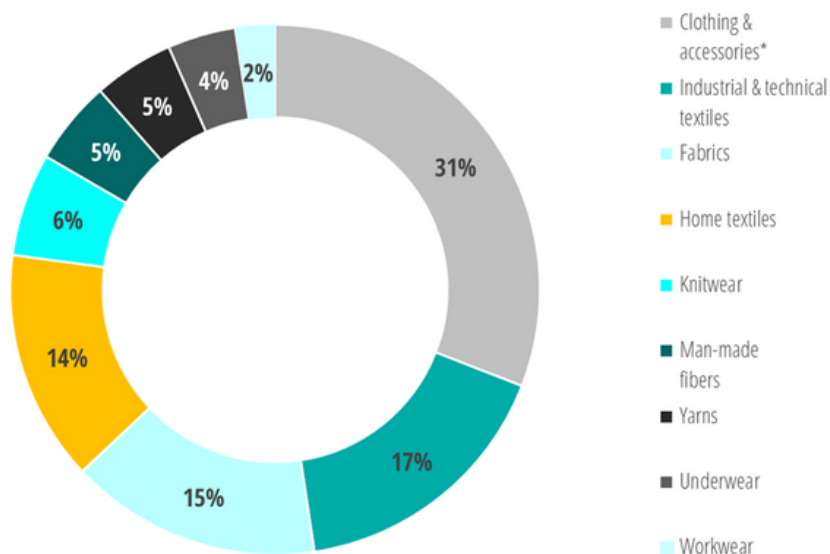
EURATEX calculations, based on EUROSTAT data

PROFILE

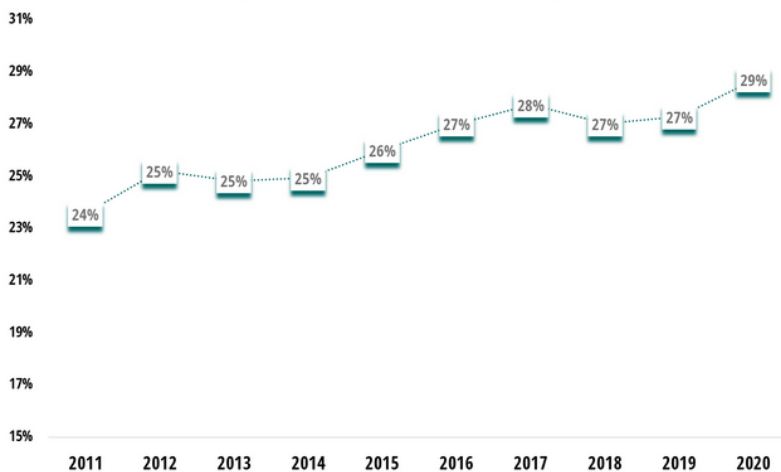
PRODUCTION

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

EU 27 Production in T&C industry | Breakdown by sub-sector



Share of technical textiles in total textile production (2011-2020 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...

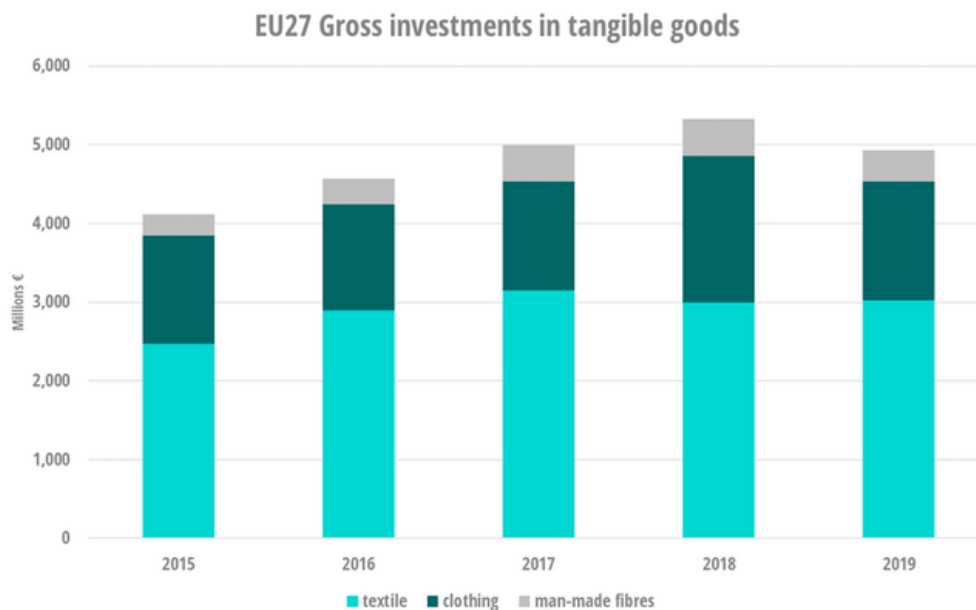
*Clothing & accessories: excluding underwear and workwear

Source: EUROSTAT

PROFILE

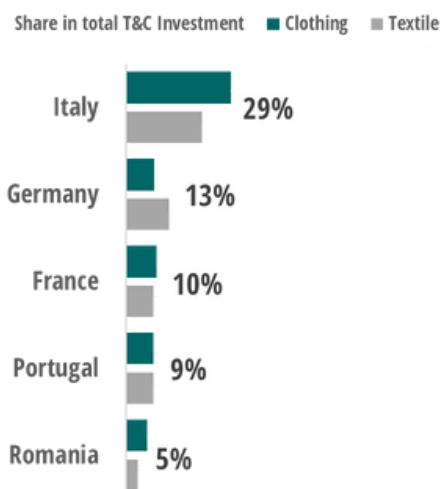
INVESTMENTS

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 Members States, broken down by sector



In 2019,
63% 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

EU household consumption of clothing in 2020

EUR at current prices, per capita



Europeans spend on average

490 EUR

per year for their clothes.

In 2020, households in the European Union spent around € 220 bn on clothing articles, a decrease of -18% over the previous year.

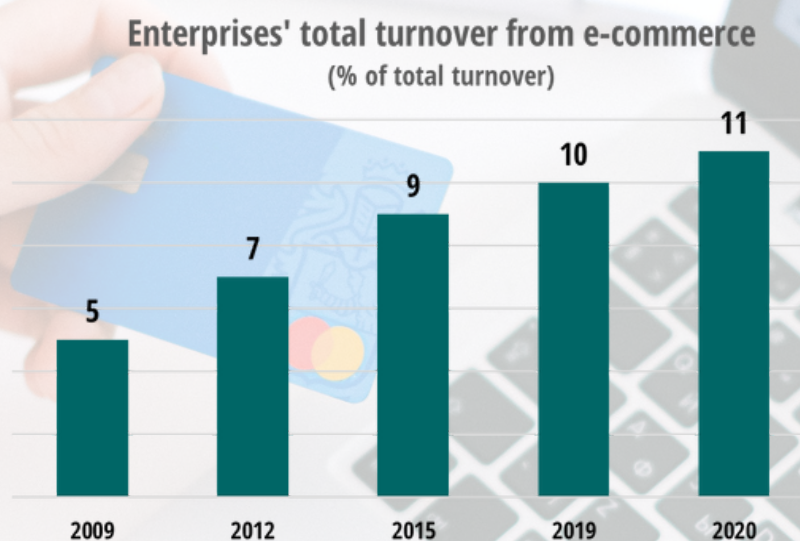
Unless specified, EU refers to EU27

Source:
EUROSTAT

E-COMMERCE

INDUSTRY TURNOVER FROM E-SALES AND E-SHOPPERS PURCHASES

The percentage of textile & clothing turnover, generated by e-sales, more than doubled since 2009



E-shopping:

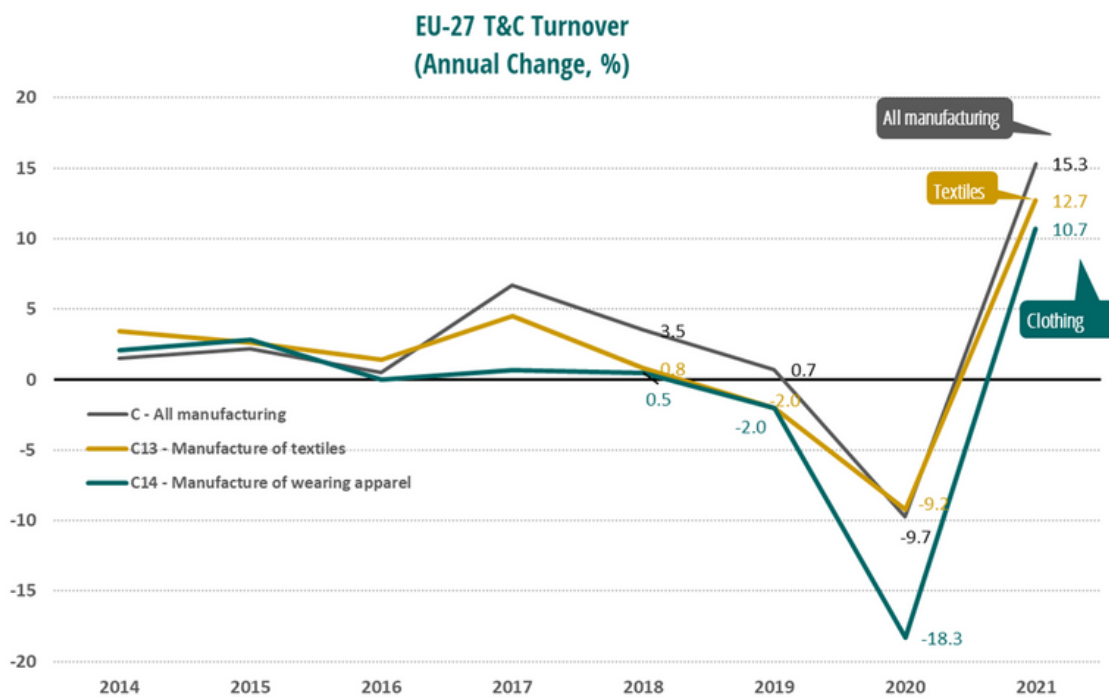
68 % of e-buyers bought clothes

The most popular purchases online related to goods in the EU in 2020 were clothes (including sport clothing), shoes or accessories. The biggest increase was among young internet users.

Unless specified, EU refers to EU27
Source:
EUROSTAT

COVID19 TURNOVER EVOLUTION

The textile and clothing companies are recovering from a strong contraction in 2020, due to the Covid-19 pandemic



Estimated increase of T&C turnover in 2021:

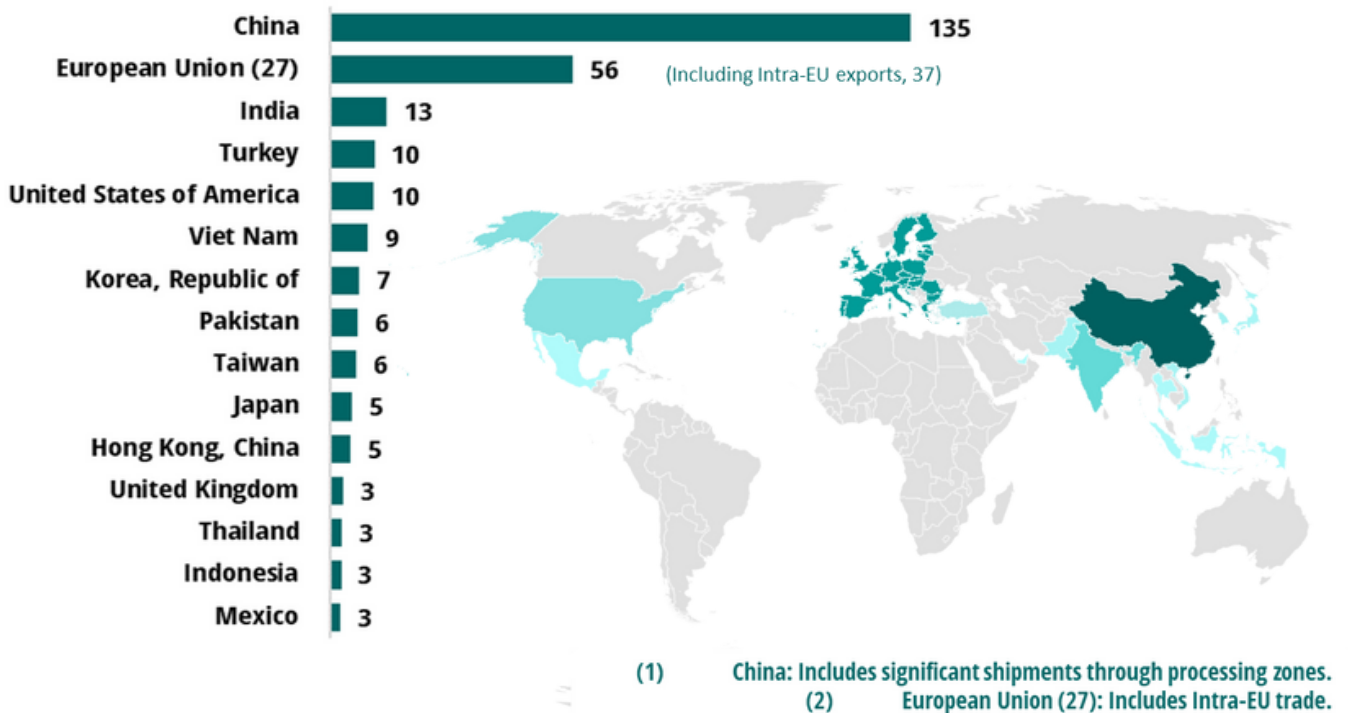
+15
BILLION €

Unless specified, EU refers to EU27
Source:
EUROSTAT

WORLD EXPORTS OF TEXTILES

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

TOP 15 TEXTILES' exporters of the world
Bn EUR

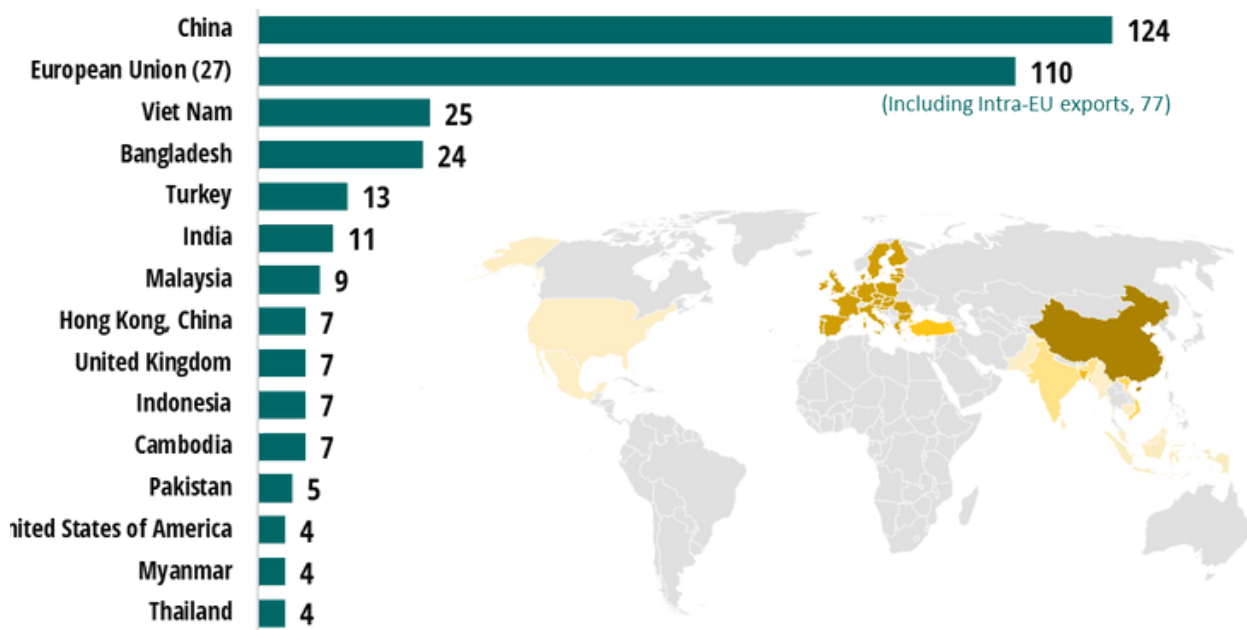


Data based on EU27
 Source:
 WTO 2022, based on 2020 data

WORLD EXPORTS OF CLOTHING

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

TOP 15 CLOTHING' exporters of the world
Bn EUR



(1) China: Includes significant shipments through processing zones.
 (2) European Union (27): Includes Intra-EU trade.

Data based on EU27
 Source:
 WTO 2022, based on 2020 data

EU TRADE : IMPORTS AND EXPORTS EVOLUTION

OVER THE LAST YEARS, OUR TRADE PERFORMANCE HAS IMPROVED; T&C IS THE 2ND MOST EXPORT INTENSIVE SECTOR OF THE EUROPEAN ECONOMY

2009-2021
evolution:
EXPORTS: +68%
IMPORTS: +60%

EU T&C trade evolution with third countries

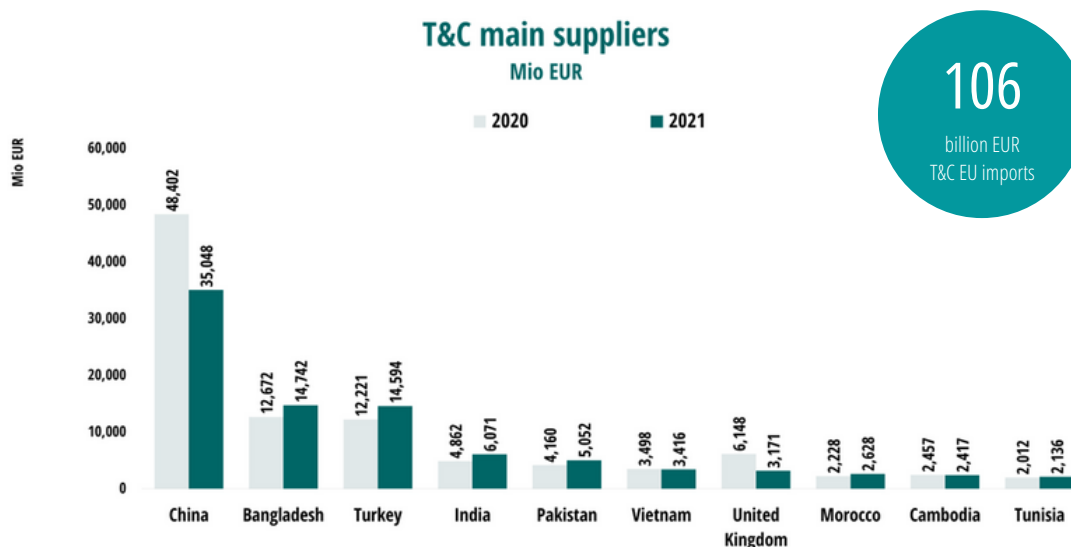


Unless specified, EU refers to EU27
Source:
EURATEX, based on IHS

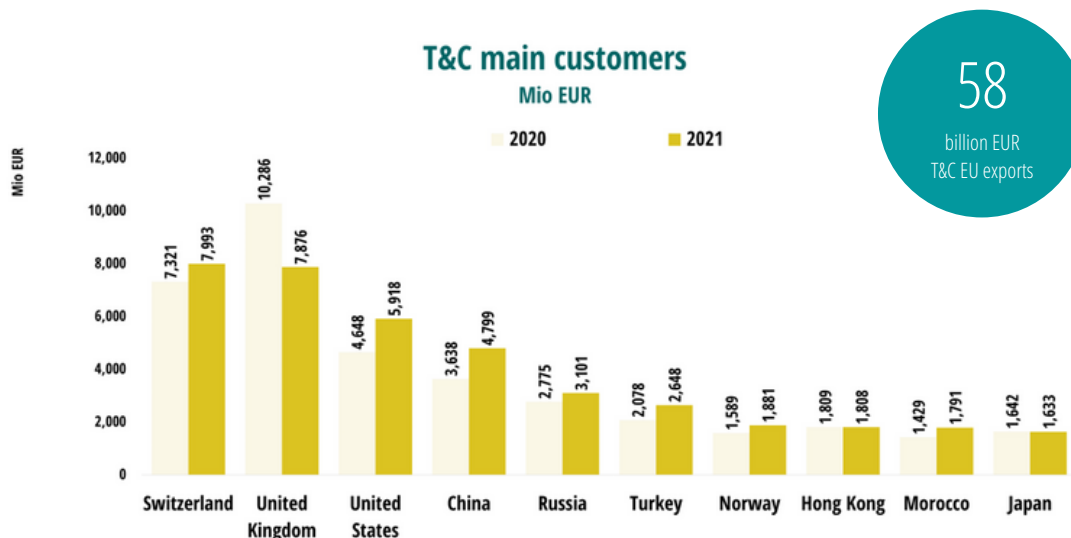
EU TRADE FLOWS BY MAIN PARTNERS

IN 2021, THE TOP 10 EU SUPPLIERS HAD A 84% SHARE IN TOTAL IMPORTS FROM THIRD COUNTRIES, AND THE TOP 10 EU CUSTOMERS ACCOUNTED FOR 68% 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:

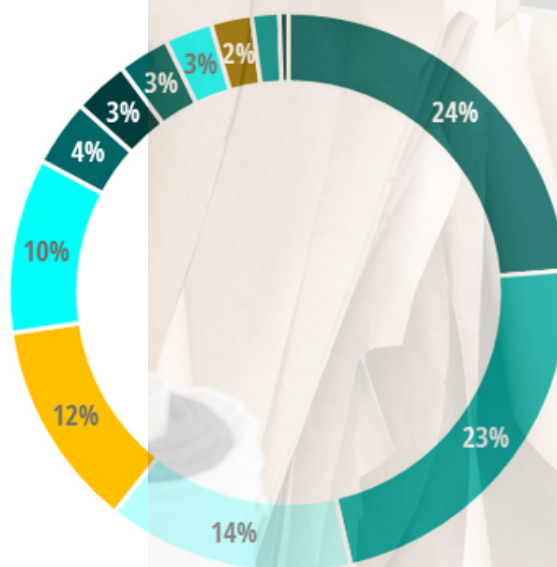
EURATEX, based on IHS

EU EXPORTS BY PRODUCT

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

Extra EU exports by product family, 2021

- Women's clothing (incl. workwear)
- Other garments knitted and woven
- Technical textiles (excl. woven fabrics)
- Men's Clothing (incl. workwear)
- Woven fabrics
- Yarns and Threads
- Carpets
- Knitted fabrics
- Natural fibers
- Home textiles
- Man-made fibres
- Workwear



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

EU T&C EXPORTS IN 2021, % shares based on Euro



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

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, the United Kingdom, Ukraine, Vietnam, CACM (Costa Rica, Panama, Nicaragua, El Salvador, Guatemala, Honduras).

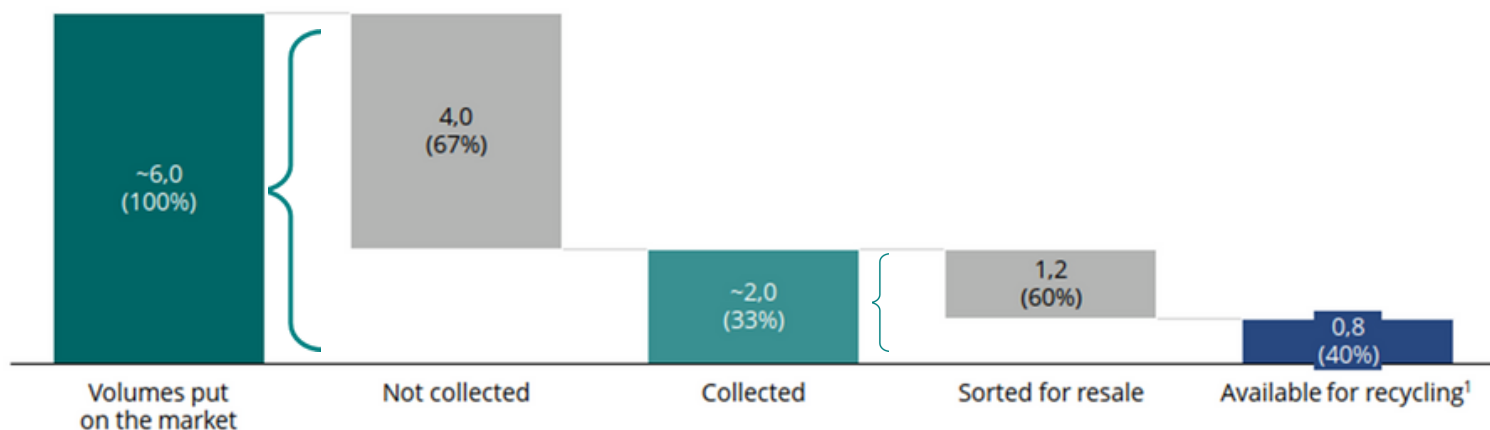
FTA NEGOTIATION/ON HOLD: USA, GCC (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, the UAE), India, Indonesia, Malaysia, MERCOSUR (Argentina, Brazil, Paraguay, Uruguay), Philippines, Thailand

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

CIRCULAR ECONOMY

POST CONSUMER HOUSEHOLD WASTE

Volumes, mn ton, 2020



Note: Does not consider unsorted materials exported outside the EU

Post consumer household waste

is the #1 waste stream by size with ~2 mn ton (33%) collected volumes and ~0.8 mn ton (40%) available to recycling today



Source:
EURATEX ReHubs TES Study, 2022

SUSTAINABILITY

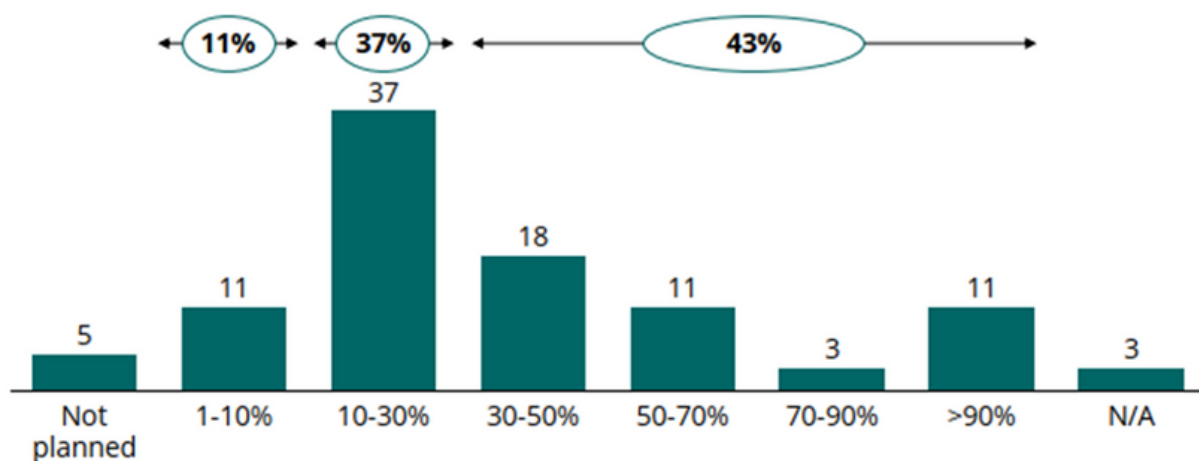
CIRCULAR ECONOMY

RECYCLED MATERIAL ON THE RISE



43% of retail brands' respondents expect that recycled fibers will be included in more than 30% of their products by 2025.

■ Products made with recycled fibers as total share of products

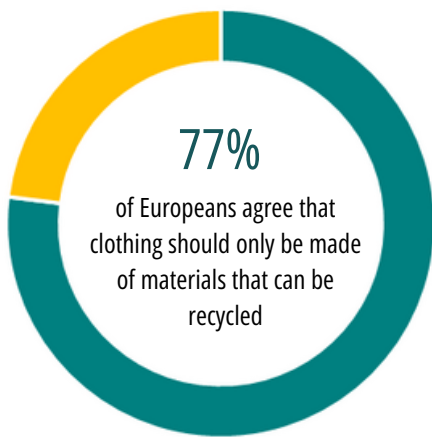
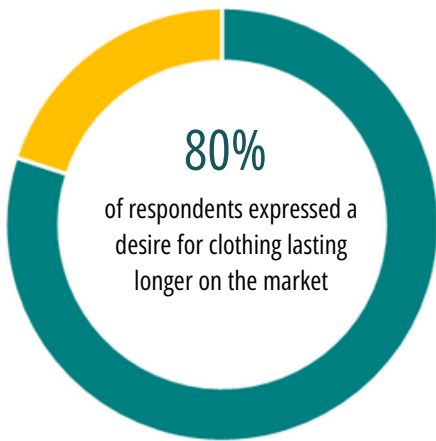


Note: Survey of European brands n=38

SUSTAINABILITY

CIRCULAR ECONOMY

CONSUMER DEMAND: EUROPEANS EXPRESS A STRONG INTEREST FOR SUSTAINABLE TEXTILES



Survey based on interviews to more than 27,000 people in the EU Member States

Source:
European Commission, Eurobarometer, 2020



"14% of people have tried to purchase second-hand clothing rather than new clothing"

Source: Fashion Revolution survey, 2020
target 5000 people aged 16-75 in the 5 largest EU markets



SUSTAINABILITY

ENERGY

FINAL CONSUMPTION IN THE TEXTILE, CLOTHING AND LEATHER INDUSTRIES (TCL)

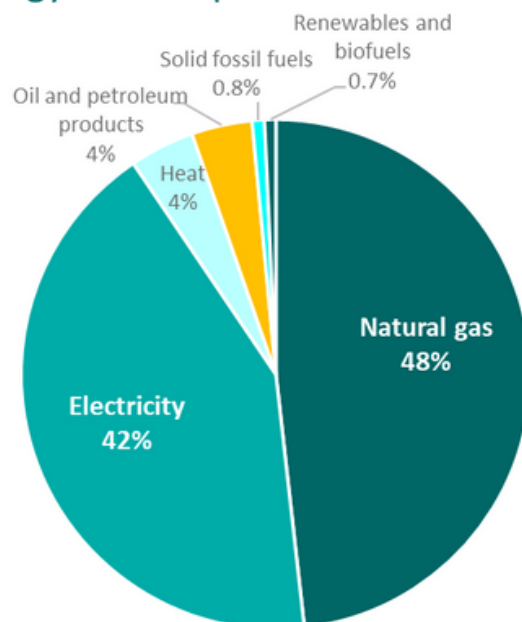


Natural gas

is the main energy source for the industry.

Green transition requires considerable innovation and investment.

Energy consumption in the TCL* sector, by fuels



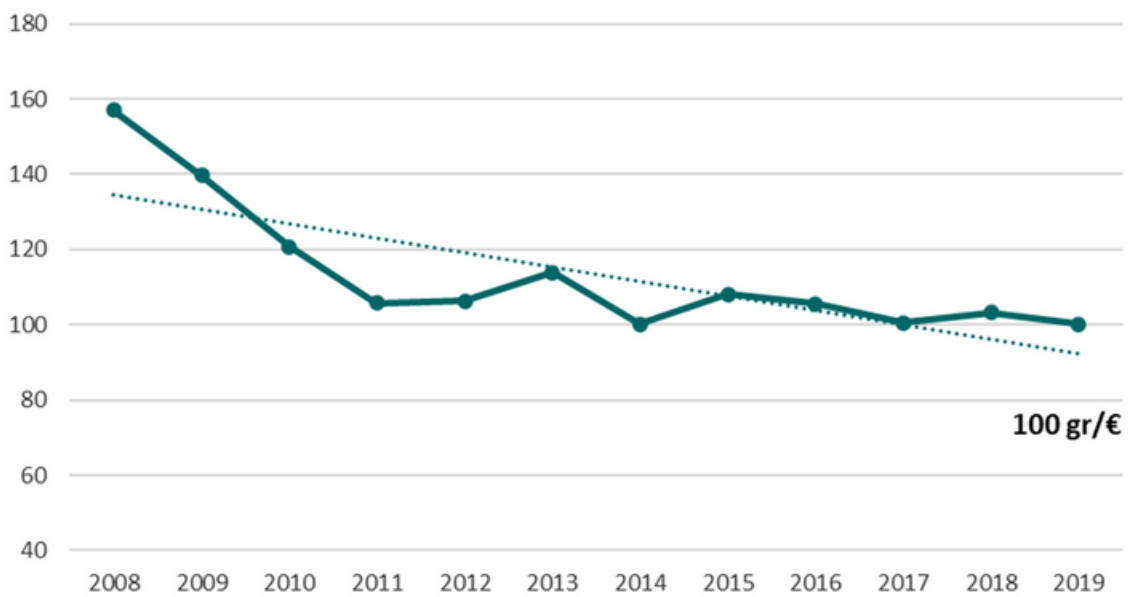
*TCL: Textile, Clothing and Leather
Source:
EUROSTAT

SUSTAINABILITY

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 TCL sectors*
2008-2019 (unit: Grams/€)



* TLC: Textile, clothing and leather

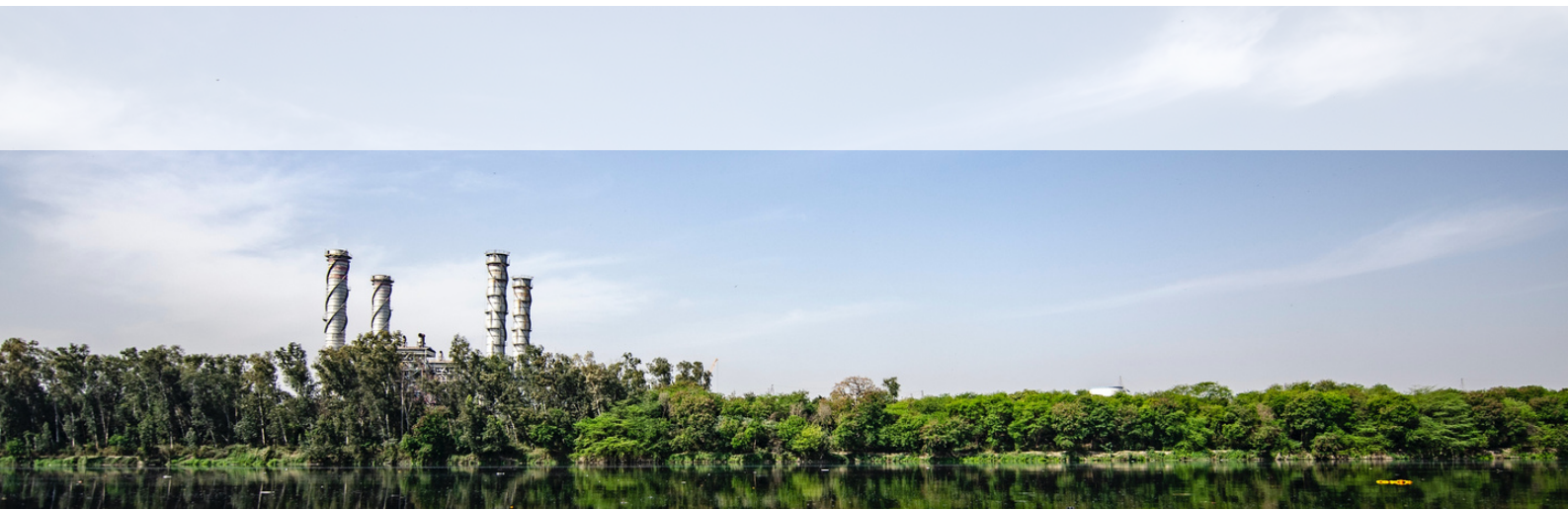
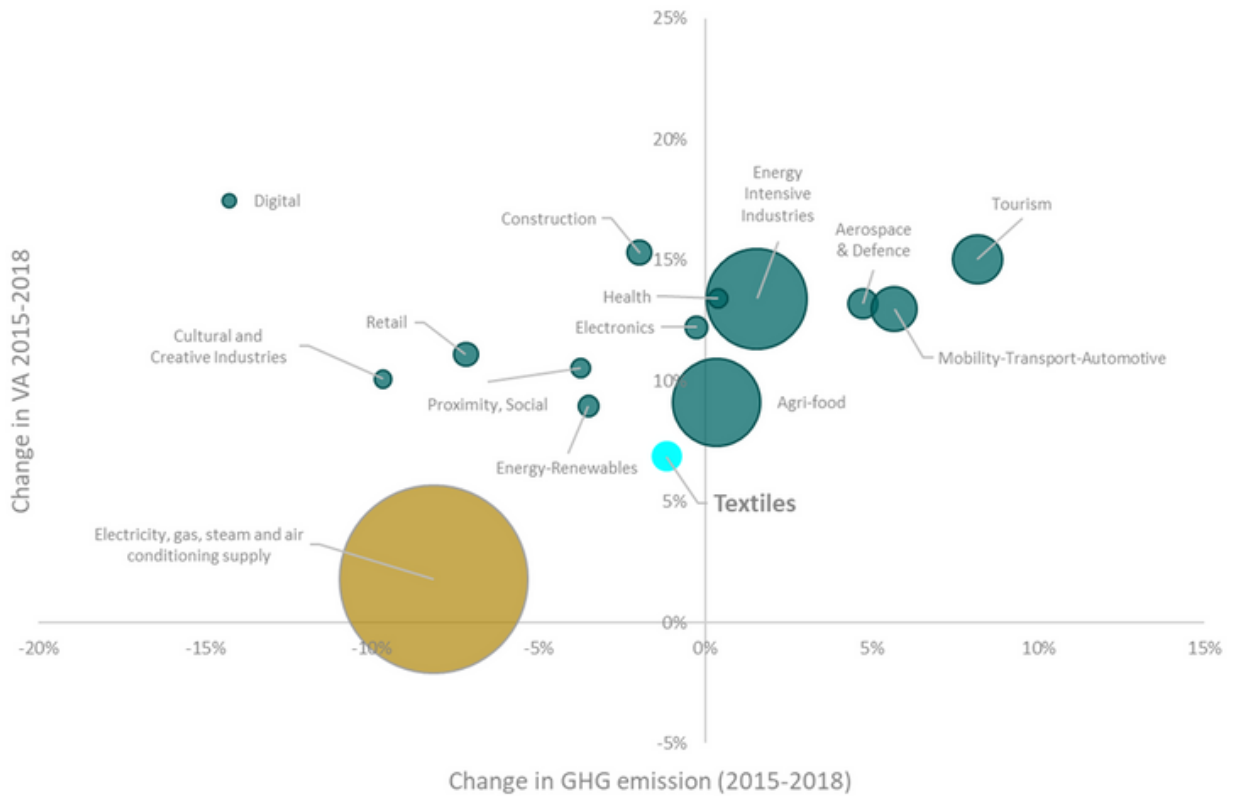
Energy efficiency is of critical importance for the textile and clothing industry and to reduce CO2 emissions.



SUSTAINABILITY

AIR EMISSION CO2

THE TEXTILE SECTOR HAS REDUCED ITS GHG EMISSION INTENSITY BETWEEN 2015 AND 2019, AS THE POSITIVE CHANGE IN VALUE ADDED IS LARGER THAN THE CHANGE IN GHG EMISSIONS



Source:
European Commission, Annual Single Market Report, 22.2.2022



CHEMICALS IN T&C

EXAMPLES OF INDUSTRY EFFORTS TO IMPROVE CHEMICALS MANAGEMENT IN TEXTILE PRODUCTION (1/2)

BLUESIGN

616	727	18%
Signatories 2019	Signatories 2020	Δ 2020/19

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

Source: Bluesign 2022

OEKO-TEX

27,554	909	28,463
+17%	+36%	+17%
STANDARD 100 (Δ 2021/20 %)	ECO PASSPORT (Δ 2021/20 %)	TOT. CERTIFICATES (Δ 2021/20 %)

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

Source: OEKO-TEX 2022

ZDHC PROGRAMME

239	7,331	10,394
+13%	+3%	+35%
Members (Δ 2021/20 %)	ZDHC Incheck Reports* (Δ 2021/20 %)	ZDHC Clearstream Reports** (Δ 2021/20 %)

The ZDHC Programme is a multi-stakeholder group which includes brands, value chain affiliates, and associates, that work collaboratively to implement responsible chemical management practices. ZDHC is an organisation dedicated to eliminating hazardous chemicals and implementing sustainable chemicals in the leather, textile and synthetics sectors.

* Chemical inventory conformance

**Conformity with ZDHC wastewater guidelines.

Source: ZDHC 2022



CHEMICALS IN T&C

EXAMPLES OF INDUSTRY EFFORTS TO IMPROVE CHEMICALS MANAGEMENT IN TEXTILE PRODUCTION (2/2)

TEXTILE EXCHANGE

790+ **48,000+**

ACTIVE MEMBERS

Sites certified in 2021 To our 8 active standards in 99 countries with 28 certifying bodies

Textile Exchange is a global non-profit that creates leaders in the preferred fiber and materials industry. With a robust membership representing leading brands, retailers, and suppliers, Textile Exchange is positively impacting climate through accelerating the use of preferred fibers across the global textile industry.

* Numbers as of June 2022

Source: Textile Exchange, 2022

BETTER COTTON

2,409

+14%

MEMBERS
Δ 2021/20 (%)

9,988

+35%

NON-MEMBER

BCP Suppliers

2.5 Mio Tons

+47%

BETTER COTTON SOURCED

Δ 2021/20 (%)

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 2,400 members in the Better Cotton network.

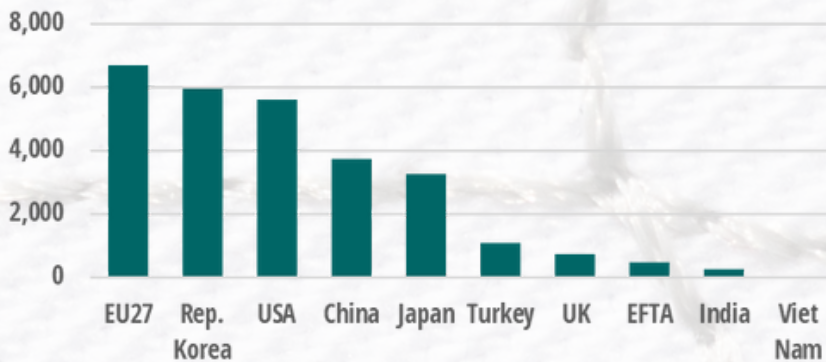
Source: Better Cotton 2022



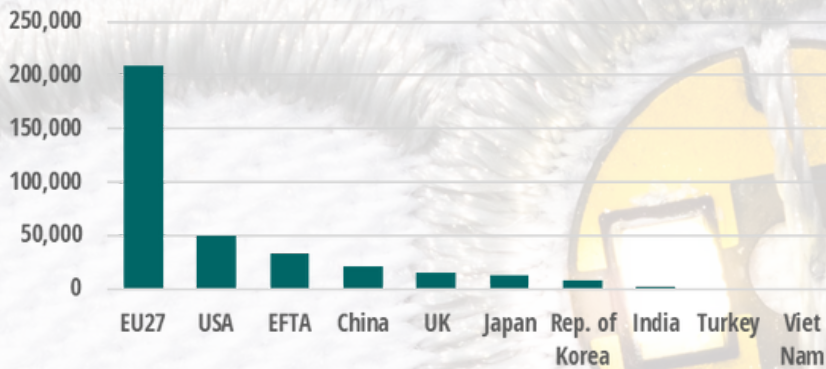
EUROPE – WORLD CAPITAL OF TEXTILE RESEARCH & INNOVATION

THE EU27 RECORDS THE HIGHEST NUMBERS OF PATENTS' & INDUSTRIAL DESIGNS' APPLICATIONS FILED IN TCLF* SECTORS

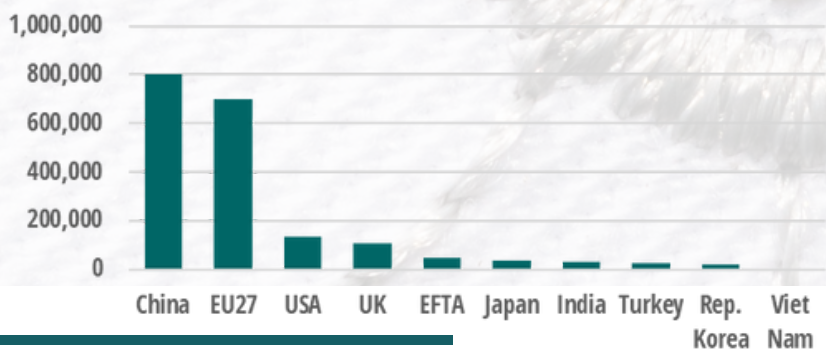
EU27: 7,700 Patents filed
(number, 2015-2019)



EU27: 209,000 Industrial designs
(number 2019)



EU27: 701,000 Trademarks registered
(number 2019)




*TCLF: Textile, clothing, leather and footwear


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



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