

EURATEX RELEASED BULLETIN N°2/2018

THE BULLETIN PROVIDES AN IN-DEPTH ANALYSIS OF THE EU TEXTILE AND CLOTHING EXTERNAL TRADE IN 2016-2017. IT INCLUDES TRADE EVOLUTION BY SECTOR (I.E. FIBRES, YARNS, FABRICS, CARPETS, TECHNICAL TEXTILES, HOME TEXTILES, WORKWEAR, MEN & WOMENSWEAR), BY PRODUCTS AND BY EU MAIN TRADE PARTNERS.

Increased demand for EU technical textiles and clothing articles

16 JULY 2018 - Exports of technical textiles¹ outside the EU-28 once again increased. With a 39% share in 2017, the sector is a pillar of textile exports outside the EU. This growth translated into almost €10.6 bn of exports, an increase of +8.5% in value. With 20% of technical textile purchases from the EU-28, the USA was far and away the main client.

With a +9.3% year-on-year increase, **menswear** exports outside the EU-28 still accounted for 23% of total clothing exports amounting to almost €6 bn. Demand boomed primarily thanks to exports to developed countries such as Switzerland which added an outstanding +38.2%, due mainly to large purchases of trousers, coats and shirts. Another country on this list was Norway with +21.5%, focused on the same articles. This upsurge in exports was driven by retail sector demand and especially by the growth in e-commerce. Other buyer nations, in value terms included: Russia, China, South Korea and Ukraine. Mirroring the situation in menswear, extra-EU-28 sales of **womenswear** increased in value terms by +9.6% to €10bn.

Furthermore, exports of rugs and **carpets** outside the EU-28 expanded again strongly in value by +5.9%. This sector represented 4.3% of all textile exports outside the EU. Customer-wise, the four main buyers (USA, Switzerland, Norway and Russia) absorbed almost half of exports of rugs and carpets outside the EU.

EU Imports' growth in technical textiles, home textiles and womenswear

Technical textiles reached a sizeable part of EU-28 textile imports: 32.6%, or a total of €11.1bn, following a +6% increase in 2017. With a 42.4% share of imports, China was (far) ahead in the rankings of technical textile suppliers to the EU-28, owing to a +3.9% rise in value terms. The USA held onto second place with sales to the EU-28 up by +4.3% in value terms, maintaining a 13% share. As the third major supplier, Turkey's sales to the EU-28 expanded by +8.1%.

¹ This wider definition includes also technical textiles outside the traditional Harmonised System chapters relating to textiles (HS 50 to 63), as for i.e. medical textiles, glass fibers as well as sanitary towels and napkins.

Housebuilding is a key activity in the economies of EU Member States and drives all kinds of **home textiles** purchasing. Consequently, imported goods benefited from the economic situation, yet exhibited lower average unit prices, resulting in imports that rose by +2.8% in value. These positive changes were credited to demand for bed linen and home linens, and to a lesser extent, table linen. 85% of extra-EU-28 imports of home textiles were shared among four countries: China (share 32%), Pakistan (share 26%), Turkey (15%) and India (11%). Besides, there were remarkable gains in value for Bangladesh, Egypt and Taiwan.

In 2017, imports of **womenswear** stood at €29.8bn (36% of total apparel imports), i.e. a +2.2% climb in value, leading to a marginal -0.9% dip in average unit prices. Imports rose for the five main imported items: trousers, skirts and dresses, coats, blouses and underwear. China continued to be the main supplier. In 2017, imports from China were -0.7% lower in value terms. China's share of imports of women's clothing stood at 35.6%. Due to continued annual expansion of its import share, Bangladesh was inevitably next in line behind China, with value increasing by +4.7%. Its share of womenswear imports reached 13.7%. In third place, Turkey continued to be a preferred traditional supplier, adding +3.3% to its sales.

Among other clothing articles, EU imports of **pullovers** and **cardigans** achieved a moderate growth while **menswear** and **babies' garments** have pointed down.

For more information: roberta.adinolfi@euratex.eu Subscription: <http://euratex.eu/library/bulletins/>

CITH - the Textile and Clothing Information Centre was used extensively for the drafting of this publication. It provides statistical information on trade in textile and clothing since 1981. The basic data are collected by Eurostat and subsequently processed by the CITH in order to present the European import and export data in detail by partner country and by product, in accordance with the groupings used by Euratex. CITH can deliver tailor-made reports on customers' request, which can be updated on a regular basis, or adapted to a specific format.

EURATEX - the European Apparel and Textile Confederation, is representing the interests of the industry at the level of the EU institutions. As the voice of the European industry, EURATEX aims to create a favorable environment within the European Union for manufacturing of textile and clothing products.

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