

Opportunities for Moroccan denim and textiles in Northern Europe

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Northern Europe (Germany, the Netherlands, United Kingdom, Norway, Sweden, Denmark, Finland) is a strong textile and fashion market with continuous growth. Its fast fashion and knitwear segments account together for nearly €47 billion. The denim subsegment accounts for over two thirds of Eurozone jeans imports and is valued at €4.63 billion, while the home and technical textiles segments account for €4.1 billion and €1.3 billion. All textile segments are characterized by diversity and stable growth. Currently, 75% Morocco's textile and fashion exports are sent to France and Spain but exports to Northern Europe are minimal. As the production costs in Asia continue to rise, and sustainability concerns grow among customers and manufacturers, Morocco could become an increasingly attractive sourcing option for Northern European buyers, through leveraging its proximity and increasingly quality-driven and sustainable production methods.

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1. Product description

This study covers denim trousers for men and women, fast fashion and knitwear, work wear and home textiles. For the list of all relevant HS Codes, consult Annex I.

Jeans are typically made of 100% cotton or with a small percentage of elastane. Denim twill is made with two yarns, one dyed and visible on the outside and the other undyed and visible on the inside. Jeans are made from dark or raw denim, but most are washed or treated before sale. The most commonly used dye is synthetic indigo. Other features include the zipper, buttons, pocketing, rivets and label.

Fast fashion is a term used to describe designs moving from catwalk to store in the fastest possible time to capture current trends in the market. The fast fashion business model combines fashionable clothes, mid-to-low range prices, quick response to customer demand and frequent assortment changes. Fast fashion consists of women's wear, men's wear and children's wear and includes the following product groups: trousers and shorts, t-shirts, shirts and blouses, jerseys and cardigans, dresses and skirts, jackets, coats and blazers as well as suits and ensembles. Typical fibers used in production of fast fashion include natural fibers (plant, e.g. cotton, flax/linen, jute, ramie or animal, e.g. wool, silk, angora, cashmere), synthetic fibers (e.g. viscose, polyester, acrylic, nylon), or blends. Knitwear includes all women's wear, men's wear and children's wear that is crocheted or knitted. Typical materials used include wool, other fine animal hair, cotton, man-made fibers, flax/linen or ramie or other textile materials.

Technical textiles include protective clothing designed to protect the worker's body from injury or infection. It is typically worn for job-related occupational safety reasons and provides protection from hazards such as heat, chemicals, biohazards, electric hazards. For the purposes of this study, the technical textiles category includes occupational wear ensembles, jackets, blazers, trousers, breeches, overalls and other garments.

Home textiles are textile products used at home for decorative or functional uses. They are typically made of various natural and synthetic fibers. In this study, home textiles include bed linen (e.g. bed sheets and duvet covers), bathroom and kitchen textiles (apron, pot holders, kitchen towels, table linen), and curtains. Since the home textiles category is very disparate from all the other "clothing" categories contained in this study, it will not be covered in depth.

2. Moroccan denim and textile sector

Morocco has a well-developed and diverse textile sector, which accounts for 7% of the country's GDP and 25% of its exports. Denim is one of the most important and dynamic subsectors, generating more than EUR 500 million yearly and being the main driver behind modernization, innovation, R&D and reorganization of entire textile supply chains. The Moroccan denim sector is planning to double its share of total apparel exports by 2020 by increasing volumes and capturing higher value-added markets. It is well positioned to gain a larger share of EU export, because of its proximity to Europe, duty-free trade and lower labor and production costs than Turkey or Poland, but its further development will depend on the pace of the denim companies' transformation into sustainable and innovative entities and the development of the local raw material supply such as yarns and fabrics.

3. Market opportunities in denim

Denim is commonly worn in Europe and is perceived as durable, versatile and affordable. The European denim import market is valued at €6.98 billion, of which Germany, Denmark, Finland, the United Kingdom (the UK), the Netherlands and Sweden, together comprise 66% (€4.63 billion or over 427 million pairs units). Norway is a market that is comparable in size and trends to Sweden and Denmark, however, due to the lack of availability of comparative statistics for Norway in the Eurostat database, it is not covered in this study.

At €2.1 billion in value, Germany is the largest import market in Northern Europe, followed by the Netherlands with €994 million and the UK with €907 million. Denmark, Sweden and Finland constitute much smaller markets, respectively estimated at €297 million, €237 million and €63 million. In the last five years, the value of imports for the region has grown at an average rate of 5.4% per year. While the top three countries have grown at a strong pace over the last five years, i.e. between 4.9 and 8.3% per year, the Scandinavian countries have shown much slower and even negative growth, with Sweden growing the fastest at 2.1% per year, Denmark at 1.5% per year and Finland declining by -1.8% per year.

Northern European denim imports are dominated by Asian countries, with Bangladesh, Turkey, Pakistan and China being the top four exporters, together comprising €2.1 billion or ~46% of total denim import value. They

are followed by Italy, which is Europe's largest producer of denim, Tunisia, the Czech Republic, Cambodia, Vietnam and Egypt. Germany, the Netherlands and Poland are major re-exporters of denim within Northern Europe, they all place before Italy in terms of value, together accounting for 18% of denim trade in the region. Extra-EU imports currently comprise 57.4% share as compared to 42.6% for Intra-EU imports. All Northern European countries have a mix of Asian and European denim suppliers, except for Finland, where 93% of denim imports are sourced from other European countries.

Table 1: Top 10 denim exporters to Northern Europe, 2017 EUR value and 2012-2017 CAGR

Country	Value	5-yr growth
Bangladesh	€725 m	↑8.4%
Turkey	€651 m	↑7.9%
Pakistan	€453 m	↑15.7%
China	€301 m	↓-10.5%
Italy	€260 m	↑0.3%
Tunisia	€140 m	↑0.6%
Czech Republic	€135 m	↑9.2%
Cambodia	€107 m	↑12.7%
Vietnam	€59 m	↑9.8%
Egypt	€58 m	↓-1.0%

During the last five-year period, the values of denim imports from the top three countries have grown at high average yearly rates: 15.7% for Pakistan, 8.4% for Bangladesh and 7.9% for Turkey, while the imports from China have declined markedly, at -10.5% per year, signaling a strong shift away from this once primary exporter. Imports from Germany and Poland have strongly outperformed the market with respective average growth of 15% and 20%, signaling their growth as Northern Europe's denim trade hubs.

Table 2: Denim imports – 2017 value (in EUR), 2017 volume, 2012-2017 volume and value CAGR, major exporters and import dynamics by country

	Germany	Netherlands	United Kingdom
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Import value	€2.134 billion	€994 million	€907 million
Import volume	187,6 million	94,9 million	96,8 million
5-yr Value growth	↑ 5.7%	↑ 8.3%	↑ 4.9%
5-yr volume growth	↑ 4.0%	↑ 8.7%	↑ 3.1%
Major Exporters % share of exports	Bangladesh (13.6%) Turkey (11.3%) Poland (11.0%) The Netherlands (10.6%) Pakistan (10.2%)	Germany (20.6%) Bangladesh (16.4%) Turkey (11.7%) Pakistan (8.0%) China (6.7%)	Bangladesh (20.9%) Turkey (20.2%) Pakistan (11.4%) China (8.4%) Germany (5.3%)
Import dynamics	<ul style="list-style-type: none"> • Intra-EU imports to grew at a much higher 5-year rate (10.1%) than Extra-EU imports (2.3%); • In the last 5-years, China's share decreased from 17% to 6%; • Poland and Pakistan increased their shares of imports significantly. 	<ul style="list-style-type: none"> • Intra-EU imports grew at a higher rate than Extra-EU (9.6% as compared to 7.4%); • In the last 5 years, Germany, Bangladesh, Pakistan and China grew their shares of imports; • Turkey and Tunisia lost market during the same time. 	<ul style="list-style-type: none"> • Extra-EU imports are growing at 5.2% compared to 3.9% growth for Intra-EU imports. • China has been losing market share over the last 5 years; • Bangladesh, Turkey, Pakistan and Germany grew their market share during this time.
	Denmark	Sweden	Finland
Import value	€297 million	€237 million	€63 million
Import volume	26,1 million	17,3 million	4,5 million

5-yr value growth	↑ 1.5%	↑ 2.1%	↓ -1.8%
5-yr volume growth	↑ 3.0%	↑ 1.5%	↓ -2.0%
Major Exporters % share of exports	Turkey (31%) Bangladesh (17.5%) Italy (9.8%) Pakistan (9.2%) China (7.3%)	Italy (14.8%) Bangladesh (12.8%) Pakistan (10.2%) Denmark (9.7%) Germany (9.3%)	Sweden (36.5%) Denmark (15.4%) Germany (10.1%) Poland (6.8%) Estonia (5.2%)
Import dynamics	<ul style="list-style-type: none"> • Extra-EU imports grew at 4.5% 5-year rate, while Intra-EU imports declined by 4.5%; • Imports from Italy and China decreased significantly over the last 5 years; • Imports from Bangladesh and Pakistan grew during the same time. 	<ul style="list-style-type: none"> • Extra-EU imports outpaced Intra-EU imports with an average yearly growth of 4.3% vs. 0.7%; • Imports from Denmark, China, Turkey and the Netherlands dropped significantly in 5 years; • Imports from Italy, Bangladesh, Pakistan and Germany grew during the same time. 	<ul style="list-style-type: none"> • Extra-EU imports comprise ~7% of Finland's denim imports and have been declining 10%/year; • Sweden, Poland, the UK and Spain grew their share of imports in the last 5 years; • Denmark, Germany, Estonia, the Netherlands and Italy have lost market share during the same time.

Source: M-Brain analysis based on Eurostat data

With a total value of €2.7 billion, Men's jeans comprise 59% of jeans imports in Northern Europe as compared to 41% share of Women's jeans. Although the share varies by country, all countries except the UK see the Men's jeans segment dominate the imports. This is due both to higher absolute import volumes as well as the higher average unit prices of Men's jeans. In Germany, Denmark and the UK, the Men's segment's share has decreased over the last five years, due to slower growth of import volumes and in part due to increase in unit prices of Women's jeans. Finland, the Netherlands and Sweden have experienced the opposite trend, with the Men's jeans share increasing in line with stronger import volume growth than the Women's segment.

Table 3: Denim imports - 2017 volume, 2017 value (in EUR) and 2012-2017 CAGR by segment and country

	Germany	Netherlands	United Kingdom	Denmark	Sweden	Finland
Men's: Value	€1.4 billion	€634 million	€376 million	€160 million	€157 million	€38 million
Women's: Value	€760 million	€360 million	€531 million	€137 million	€80 million	€26 million
Men's: 5-year value growth	↑ 5.1%	↑ 9.0%	↑ 1.5%	↓ -0.1%	↑ 6.1%	↑ 0.8%
Women's: 5-year value growth	↑ 6.9%	↑ 7.0%	↑ 7.7%	↑ 3.5%	↓ -3.8%	↓ -4.9%
Men's: Volume	118 million	59 million	37 million	12 million	10 million	2.5 million
Women's: Volume	70 million	36 million	60 million	14 million	7 million	2 million

Source: M-Brain analysis based on Eurostat data

The European denim market is increasingly diverse. Each country has a variety of denim retailers, ranging from economy, through mid-range, to luxury. Typically, the mid-segment and luxury sellers have a strong client base thanks to their reputation and quality, and the economy sellers have a high volume of sales due to their presence, extensive offering, varied price points and fast fashion strategy. In most Northern European countries, H&M leads denim sales, together with other economy players like C&A in Germany and the Netherlands, Primark, River Island and Next in the UK and the Bestseller group of brands throughout Northern Europe. At the same time, most Northern European customers put a lot of emphasis on quality and sustainability, which is driving the growth of premium and super-premium jeans segment.

Finland and Sweden have the highest average unit import prices, €14,1 and €13,7, followed by Germany and Denmark with €11,4. The Netherlands and the UK have the lowest import prices, respectively €10,5 and €9,4 per unit. Higher prices in Finland, Sweden and Denmark are in part caused by high share of imports from EU countries as compared to other importers in the group but are also on average higher for Asian exporters. The average Northern European unit prices of jeans imports are €11,64 for Men's jeans and €10,01 for Women's jeans. In all countries, the average unit prices are higher for Men's jeans, with the highest price differential in Sweden and Denmark, where average unit prices of Men's jeans are €4,72 and €3,92 more expensive than Women's. They are followed by Finland with a €2,08 price differential. Over the last 5 years, the average import unit price of Women's jeans has declined in the Netherlands, Denmark, Sweden and Finland, while Men's jeans

prices only declined in Denmark and Sweden, indicating that in most countries the Men's segment is tending towards premium pricing and the Women's segment towards economy pricing.

Table 4: Denim imports 2017 unit price and differential, and 2012-2017 price CAGR by segment and country

	Germany	Netherlands	United Kingdom	Denmark	Sweden	Finland
Average Unit Value	€11,4	€10,5	€9,4	€11,4	€13,7	€14,1
5-year price change	↑ €0,90	↓ €0,21	↑ €0,79	↓ €0,85	↑ €0,38	↑ €0,15
Men's: Unit Prices	€11,66	€10,68	€10,30	€13,54	€15,69	€14,98
Women's: Unit prices	€10,91	€10,13	€8,80	€9,62	€10,97	€12,90
Price Differential	€0,75	€0,55	€1,50	€3,92	€4,72	€2,08
Men's: 5-year Price change	↑ €1,23	↑ €0,48	↑ €0,84	↓ -€1,12	↓ - €0,12	↑ €0,07
Women's: 5-year price change	↑ €0,34	↓ -€1,42	↑ €0,93	↓ -€0,35	↓ - €0,24	↓ - €0,06

Source: M-Brain analysis based on Eurostat data

Average unit prices vary by exporter and importer. Bangladesh typically offers the lowest unit prices, in the range of €5,66 - €7,41, followed by Pakistan €7,51 - €8,95 and China €5,13 - €9,47. Turkey is in the mid-price range of €13,28 - €16,04 followed by the Czech Republic at €21,51 and Italy with its premium offer in the €22,94 - €33,27 range. This price disparity shows that while low price is important for a certain share of imports, there is a premium placed on proximity like in the case of Turkey and the Czech Republic and premium design and production, as is the case with Italy.

Table 5: Denim imports - 2017 average unit price per country and exporter

	Germany	Netherlands	United Kingdom
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Average unit price /exporter	Bangladesh: €6,27 Turkey: €16,04 Pakistan: €7,53 China: €8,85 Italy: €27,83	Bangladesh: €5,66 Turkey: €15,22 Pakistan: €7,60 China: €9,47 Tunisia: €18,35	Bangladesh: €6,68 Turkey: €13,95 Pakistan: €7,51 China: €5,13 Egypt: €10,83
	Denmark	Sweden	Finland
Average unit price /exporter	Bangladesh: €7,41 Turkey: €14,50 Pakistan: €8,95 Italy: €22,94 China: €7,54	Bangladesh: €6,79 Pakistan: €8,72 Italy: €33,27 Turkey: €13,28 Czech Republic: €21,51	Sweden: €14,88 Denmark: €17,56 Poland: €7,70 Germany: €15,72 Estonia: €17,27
<i>Source: M-Brain analysis based on Eurostat data</i>			

Major European retailers that source from Bangladesh, Pakistan and Turkey include H&M, Primark, Asos, Tesco, Diesel, G-Star, s.Oliver, Mango, C&A, Next, Zara, Bershka and Hugo Boss. The three countries provide different competitive advantages to the clients. Bangladesh leads with competitive pricing for big volumes, increasingly modernized production with focus on sustainability and increasing the value added. Pakistan has the advantage of being one of world's top cotton producers, making it a one-stop-shop for denim production. It offers low pricing and increasingly innovative production that increasingly caters to high value brands. Turkey benefits from local cotton production and a well-developed supply chain, capable of supplying most fabrics, washings and embellishments. Although, it is on average 1.5-2.5 more expensive than Pakistan and Bangladesh, it offers fast delivery and flexibility to repeat popular orders or try new patterns or colorways on existing designs, allowing for smaller orders and fast restock of popular lines. All three countries are increasingly producing more innovative, sustainable and value-added products.

Morocco's position as a denim exporter lies between Bangladesh and Turkey. Like Bangladesh, it has no local access to raw materials and can offer low production costs. On the other hand, it can also offer flexibility and speed in terms of delivering samples and production just like Turkey and it benefits from duty free access to Europe. Morocco has extensive subcontracting experience for big retailers in France and Spain like Inditex, Kiabi, el Corte Ingles, Carrefour, Cortefiel and others.

Tips for exporters:

- Focus your export efforts on Germany, the Netherlands and the UK, three of the biggest markets with strong growth and high acceptance of Extra-EU suppliers. You should focus on subcontracting for big brands or retailers.
- Denmark and Sweden comprise much smaller and slower growth markets but offer attractive pricing in the Men's jeans segment. They are also home many global brands such as H&M, Lindex, Kappahl, Acne and IC Group.
- Finland is the least attractive market due to its impenetrability.
- Master the design look and feel of the Northern market and work on sourcing capabilities to find

innovative and eco-friendly new materials.

- Develop strong production and design competencies in both the Men's jeans and the Women's jeans segment, with the long-term aim of expanding into other denim garments and textiles.
- Look to cooperate with the fashion retailers and manufacturers that are successful in one or more Northern European countries, e.g. H&M or the Bestseller brands. Typically, contracts for garment subcontracting are signed at the HQ level. Have your marketing/sales department reach out to major brands for potential subcontracting opportunities.
- Assure production security through improving your access to raw materials.

4. Trends in denim

Trends in denim can be roughly categorized into environmental and social trends, customer demand trends, and sales and marketing trends.

Environmental sustainability concerns increasingly influence the buying behavior in Northern Europe, especially in the Scandinavian countries and among premium and super-premium buyers, forcing companies to invest in improve or develop more environmentally friendly denim production processes such as:

- *Reducing the use of water, power and wastewater in production* through using innovative finishing techniques like: zerowater technology, ozone wash, Advanced Denim, and laser wash.
- *Chemical management is increasingly important*: collecting Material Safety Data Sheets (MSDS), working with more environmentally friendly chemicals (e.g. less polluting fabric dyes and processes like sustainable foam dying technology IndigoZero) and having a solid chemicals management system is essential. A number of textile and shoe manufacturers have started and joined the [Zero Discharge of Hazardous Chemicals](#) association (ZDHC), which has made it its goal to completely ban 11 harmful substances from their production processes and to advance sustainable chemistry and best practices across the value chain. ZDHC is working together with the [Sustainable Apparel Coalition](#), an association which developed the [Higg Index](#), i.e. a set of standardized supply chain measurement tools that brands increasingly request from suppliers.
- *Introducing ecofriendly fibers* like organic denim made with organic cotton or [Better Cotton Initiative](#) (BCI) can be a good option and natural coloring) or lyocell fibers. Denim products are increasingly combined with other materials like Modal, viscose or Lyocell.
- *Recycling and upcycling denim*: repurposing of second hand trash, unsaleable stock and denim waste to produce kitchen textiles, home textiles, bedding, packaging, shoes, and clothing.

Social fairness is another factor influencing buying behaviors. Companies are increasingly sourcing from contractors who can assure that manufacturing is done in proper working conditions, in safe facilities, with workers wearing protective gear and not being exposed to hazardous or life-threatening production processes that are outlawed in Europe (e.g. sandblasting or Potassium Permanganate sprays). Additionally, it is important for the workers to receive fair wages and have access to social and health insurance.

Transparency: clothing companies increasingly publish their entire supplier lists to provide accountability for their sourcing choices.

Tips for exporters:

- Innovate your production processes to reduce water consumption, toxic chemical use and wastewater creation. Research and partner up with companies with sustainable denim technologies like [Jeanologia](#), [Archroma](#), [Tonello](#), [Soko Chemicals](#) or [Indigo Mill Designs](#). Apply for funds from the Industrial Pollution Control Fund (FODEP).
- Develop a sustainability plan that covers at least three years and includes most of the below goals.
- Join ZDHC and Sustainable Apparel Coalition and use the tools they make available like trainings, audits, assessments. Consider partnering with [Blue Sign](#), a system partner, which offers services

where manufacturers can learn how to detox their denim supply chain.

- Invest in wastewater treatment plants (ETP) that can recycle the water. This can be done through the Industrial Pollution Control Fund (FODEP).
- Develop a capacity to work with eco-friendly fibers and to create fabric mixes that are durable and soft. Research whether you can leverage the use of any local raw materials.
- Create a recycling and upcycling initiatives for post-industrial and post-consumer denim fibers, that produce high quality textiles or clothing, e.g. similar to what is produced by [The New Denim Project](#), [Mud Jeans](#), [Salvage + Rivet](#) or [Noorism](#).
- Create social compliance policies for your company, introduce and observe proper workplace safety guidelines. Eliminate hazardous and outlawed production processes like sandblasting and PP spraying and replace them with alternatives (e.g. There are machines available that eliminate manual spraying).
- Train your employees on occupational safety, chemical management (e.g. via [ZDHC](#)) and equip them with protective clothing and provide them with training on how to use it and explain the risks of working without it. Make one person responsible for the Personal Protective Equipment and safety issues.
- Ensure that your factories are safe to work in and are not at a preventable risk of fire, electrical or structural safety.
- Make sure that all companies in your sourcing and supply chain are focused on sustainable practices and workplace safety. Prepare a list of all companies you work with in the sourcing and production cycle (sewing, washing, printing) to present to buyers. You can use the [supplier list of H&M](#) as a template.
- Apply for internationally recognized certifications such as the [EU Ecolabel](#), [Nordic Swan Ecolabel](#), [Öko-Tex](#), [GOTS](#) and [BSCI](#).

Fast fashion cycles have become the norm in Europe as consumers are hungry for novelty. Trends are cycling faster, companies are releasing new designs on a rotating basis creating a need for flexibility in production and increasingly short lead times. E.g. Zara can design, manufacture and ship a product in less than a month and subcontractors in Turkey can deliver product samples within 5-7 days of receiving the order.

Local makers increasingly innovate materials focusing on improving their performance in high stretch and 4-way stretch and in function such as moisture management and temperature control. They are also developing lighter and more fluid denim (e.g. through using lyocell fibers), which can be used in the production of shirts, dresses and voluminous shapes.

Local makers increasingly submit their designs to brands to shorten their buyers' design cycle, become more of a value-added partner rather than low value contractor and to develop own capacities for possible future retailing.

Demand for premium and super-premium denim is growing faster than demand in Northern Europe. Premium customers increasingly want to buy clothes with a story, clothes that are sustainable and clothes that are authentic. There is a growing trend in independent and artisanal brands (e.g. Le Kilt, the Cooper Collection and King & Tuckfield). Super premium denim can be created through using e.g. Japanese denim, Candiani denim or selvedge denim.

Color and Design: Jeans are made from dark or raw denim but most are washed or treated to offer a range of colors going from dark to light blue. The dye washes out over time, giving the jeans a faded look. In addition to blue denim, there are also color jeans, e.g. black, white, red or green, as well as, metallic denim, printed denim or coated denim. The dominating styles for women's jeans in Northern Europe are: skinny, high-waisted, tapered, loose fit and slim fit jeans and the main styles for men are: slim, straight leg and skinny jeans. Design trends on the rise include mom jeans and boyfriend jeans for women and biker pants and ripped jeans for men.

5. Tips for exporters:

- Invest in modernizing your production by implementing state of the art textile machinery and efficient production processes. Automate your production processes as much as possible. Apply for funding from the Industrial Development Fund (PAI 2015-2020).
- Proactively invest in research and innovation in areas where there are cost, time or process inefficiencies or team up with product or service providers who can offer solutions. E.g. read about Pakistan's [Soorty](#) and [Artistic Milliners](#).
- Create a possibility for new idea generation among your management, designers and factory workers. Award best ideas that solve problems or improve processes.
- Simplify and streamline your sourcing and supply chains to eliminate all inefficiencies and risks.
- Offer short lead times to your clients: 5-7 days for samples, 3-4 weeks for delivery.
- Offer flexibility to your clients in responding to quick fashion cycles, including flexibility in ordering, e.g. smaller orders and a possibility of quick turnaround on reorders and flexibility in trying new patterns or colorways on models.
- Aim to move towards producing high value products by innovating on product offer and quality (e.g. creating super-softness in all weights, working with different fiber mixes, creating different material structures, working with sustainable fibers).
- Create value added through developing design capacities that can be offered to clients. Design capacity can be developed through monitoring the design and demand trends in Europe, the US and Japan, organizing student exchanges and exchanges with young European labels, attending European Fashion Trade Fairs and Shows to understand the Northern European aesthetic and feel.
- In developing own designs, align with North European customer preferences with regards to colors and styles. Find resources that can help, e.g. [CBI's Fashion Forecasts](#), fashion magazines e.g., [Vogue](#), [Harper's Bazaar](#) or [Marie Claire](#).
- Research and get in touch with premium brands that pay more for smaller deliveries and flexibility.
- Do not position yourself as a low-cost supplier but rather a mid-cost supplier (i.e. between Bangladesh and Turkey) by capitalizing on the flexibility, speed to market and quality of production.

Online Sales: in the last decade, there has been an increasing trend in online and mobile shopping in Northern Europe, providing growing opportunities for direct to consumer sales for brands from around the world. This means that non-local suppliers can participate in the local market if they are able to market and distribute effectively. While it is difficult to create and market a new brand, the rising importance of online sales and online marketing has made it easier than before.

Marketing including social media marketing is playing an important role in selling jeans. Successful campaigns on Instagram, Facebook, Snapchat and Pinterest can create a brand following. Buyers are faced with a multiplicity of suppliers and options, therefore it is essential to find effective and professional ways of advertising one's capabilities, e.g. via trade shows, showrooms or direct contact.

Tips for exporters:

- Develop strong marketing, sales and communication capacities and strategies, through research, external training or external services. Invest in building capacity and training your employees, e.g. Prepare your sales team to work with mid to high segment EU buyers, train your marketing and sales department on how to make contact with buyers, arranging meetings and opening doors for sub-contracting discussions.
- Make an overview of the Northern European market data by country, showing relative market scale and trends. Research potential client prospects and build a file to map them. Prepare a strategy recommending the best route for growth and how to open doors.

- Research your own organization to define the most effective forward strategy. Create a capability matrix in which you define your strengths and weaknesses as seen from a Northern European perspective. Define your unique selling points.
- Prepare a professional offer for buyers outlining your production capacities and proactively contact clients to present your offer. You will need to develop your own calculation sheet and calculate your standard minute value. You should have different offers for volume buyers vs. value added buyers.
- Focus on advertising three main selling points among your prospective buyers: 1) sustainability and social fairness practices; 2) modern and diverse finishing and dyeing technologies, and 3) flexibility and speed to market.
- Develop capacities for good communication with clients, including employing sales and operational personnel that can communicate fluently at least in English and possibly in German.
- Be aware of the risks of opportunistic costing and overcalculation. Work on developing your negotiation capacities and always be well prepared before starting any negotiations.
- Create effective branding and develop an online presence. At a minimum create a professional website in English, which is updated on a regular basis. The website should contain a virtual tour of your factory, emphasize your compliance with corporate social responsibility and your efforts towards increasing sustainability. Explore alternative ways to create awareness about your company.
- Cooperate with trade associations, organize buying missions, showrooms, trade fair visits.
- Aim to set-up showrooms in the most promising markets, e.g. Amsterdam or Berlin.
- Exhibit at European Fashion Trade Fairs and Shows (most important shows are listed in Annex II).
- Launch Morocco Denim Expo, to promote Morocco's denim industry and to showcase the local capacities, innovation, sustainable practices, technology and design to buyers, retailers and manufacturers. This could be connected to or independent of the Morocco Fashion & Tex. Visit the [Bangladesh Denim Expo](#) for inspiration on how to structure and run the event.

6. Market opportunities in textiles and fashion

The Northern European textile market is large and diverse. Clothing categories: Fast fashion and knitwear represent the largest segment with €46.7 billion and an average yearly growth of 4.3%. Workwear and technical textiles are a €1.3 billion market with an average yearly growth of 6.1% and Home textiles are a €4.1 billion market with a 4.8% yearly growth. Germany remains the largest import market for all the textile and fashion segments, followed by the UK, the Netherlands and the Scandinavian countries. Norway is a market that is comparable in size to Sweden and Denmark, however, due to unavailability of comparative Eurostat statistics for Norway, the country is not covered in this study. Additionally, since the Home Textiles market is much different from all the other clothing categories, it is left out of this analysis, with the focus remaining on Fast Fashion and Knitwear, and Workwear and Technical Textiles.

Table 6: Fashion and Knitwear, Workwear and Technical Textiles and Home Textiles, 2017 values (in EUR) and 2012-2017 CAGR by country, and main exporters by % share and segment

	Fast Fashion and Knitwear	Workwear and Technical Textiles	Home Textiles
N. Europe Value	€46.74 billion	€1.3 billion	€4.06 billion
5-year Growth	↑ 4.3%	↑ 6.1%	↑ 4.8%

Germany Value	€20.2 billion	€606 million	€1.74 billion
5-year Growth	↑ 4.2%	↑ 7.5%	↑ 3.0%
Netherlands Value	€8.6 billion	€219 million	€663 million
5-year Growth	↑ 8.0%	↑ 12.7%	↑ 11.6%
United Kingdom Value	€12.4 billion	€233 million	€1.13 billion
5-year Growth	↑ 2.5%	↑ 1.7%	↑ 4.7%
Denmark Value	€2.5 billion	€87 million	€173 million
5-year Growth	↑ 4.2%	↑ 0.8%	↑ 5.7%
Sweden Value	€2.3 billion	€144 million	€251 million
5-year Growth	↑ 5.0%	↑ 5.6%	↑ 4.8%
Finland Value	€711 million	€54 million	€95 million
5-year Growth	↓ -1.0%	↑ 2.3%	↑ 0.6%
Main exporters to N. Europe	China (18.9%) Bangladesh (13.7%) Turkey (8.2%) Germany (6.4%) The Netherlands (4.9%)	China (14.6%) Poland (7.2%) Bangladesh (6.6%) Denmark (5.5%) Laos (4.7%)	Pakistan (23.0%) China (18.2%) Turkey (12.0%) India (8.7%) Germany (4.8%)
<i>Source: M-Brain analysis based on Eurostat data</i>			

The North European Fast fashion and Knitwear imports are dominated by China and Bangladesh, comprising respectively 19% and 14% of this segment. Turkey comes in third place with a combined share of 8%. Germany and the Netherlands, Europe's two major re-export hubs round up the top five. Over the last five years, the imports from China and Turkey have been experiencing a negative trend between -1.3% and -1.6% each year, while imports from Bangladesh have been growing at an average rate of 8.7% per year. In the meantime, the

value of re-exports from Germany and the Netherlands has been growing at a yearly rate of 14.9% and 9.3%, respectively. Workwear and technical textiles are mostly imported into Northern Europe from China (15%), Poland (7%) and Bangladesh (7%), with China declining over the last five years at 2.2% per year and Poland and Turkey growing at 28% and 55%, respectively.

7. Trends in textiles and fashion

Fast Fashion and Knitwear follow similar trends as one other and as denim.

Sustainability and Transparency: Retailers and brands are increasingly pressured by their customers to be more sustainable, environmentally friendly and ethical. An example of such efforts is H&M introducing a conscious beauty collection with 'planet friendly' products and it setting itself a goal of using **100% sustainably sourced cotton by 2020**. Companies are also committed to increased transparency in terms of its sourcing.

Increasing fashion cycle speed: Fast fashion retailers produce at least 10 collections a year with the fashion cycles becoming ever shorter. Many companies stock thousands of items at a time, allowing them to constantly update their inventory with new products (e.g. ASOS, UK's online retailer, which reportedly stocks over 60,000 items at any given time). This is made possible by running very well managed and efficient supply chains with very short lead times and constantly tracking the performance of different products and designs. Short lead times of 3-4 weeks for the delivery of the products are essential.

Digitization and social media: Digitization is a major trend in fast fashion, with many customers using a spectrum of digital platforms to uncover trends, compare prices and share experiences. Fast fashion brands are also increasingly relying on social media to drive their sales. Instagram is one of the most effective sales platforms for brands, with many brands posting videos, Instagram stories and including links to shoppable content. Digital channels no longer only serve to provide pre-purchase information; they are increasingly becoming standalone transaction platforms.

Tips for exporters:

- Apply the tips given for the denim segment to knitwear and fast fashion, as they share the same trends and characteristics.
- Seek out popular brands in each country to find contracts. E.g.,
 - UK: ASOS, Only, New Look, Very, Superdry, Primark, Marks & Spencer
 - Germany: C&A, P&C, KIK, New Yorker, TAKKO, ESPRIT, Ernsting's Family, Adler, Tom Tailor, S.Oliver
 - The Netherlands: C&A, G-Star, MUD Jeans, Petrol Industries, Shoeby Shop, Chasin, The Sting, FNG Group, HEMA
 - Sweden: Lindex, Kappahl, H&M, Ahlens, Filippa K.
 - Denmark: Bestseller Group brands (Vero Moda, Jack&Jones, and others), Acne, IC Group in
 - Norway: Varner Group (BIK BOK, Dressman, Carlings, Cubus), Johnny Love
 - Finland: Seppälä

Workwear and technical textiles:

Innovations in wearability and user comfort: There is an increased demand for lighter protective apparel and equipment because the more comfortable the protective garment, the greater the chance that the workers will wear it. The key is to create products that provide the appropriate amount of protection, while being lightweight. Fabric manufacturers have been increasingly incorporating properties such as flex or stretch, as well as increasing the garment softness and breathability to improve the wear comfort. Innovations around comfort without sacrificing the protective characteristics will continue to be a major focus in the coming years.

New technologies and fibers: The need for lighter garments has driven innovations in textiles used and the

garment design with manufacturers working on smarter textiles for protective clothing. There are significant advances in fabric technology with regards to waterproof protection and chemical resistance, e.g. the flame-resistant fabrics are now often double-treated to make sure that all materials are properly coated. The use of 3D printing and knitting will soon alter the way protective garment components are constructed.

Designing multifunctional garments: improvements in fibers and technologies, allow companies to produce protective clothing that is suitable for multi-hazard environments, i.e. workers can wear a single garment and be protected against concurrent hazards. E.g. Inherent and treated fabrics are combined with liquid-proof membranes to protect against specific hazards such as hydrocarbon flash fire, electric arc flash and chemical splash, as well as steam and hot liquid.

Tips for exporters:

- Research the newest technologies in protective clothing and apply them in your production.
- Design protective clothing in comfort in mind, offering flex, stretch and increased softness, without compromising the safety.
- Design products that are multifunctional and can protect workers against multiple hazards, e.g. fires and chemical splashes.
- Understand the different standards of workplace hazards, e.g. when it comes to flame resistance, there are different standards for workers exposed to flash fire hazards, electricians and emergency services personnel.
- Take all the European standards for functional/technical workwear into account, e.g. BS EN 1149 Protective clothing, electrostatic properties, BS EN 13034 Protective clothing against liquid chemicals, ISO 20471 high visibility clothing, etc.

8. Market entry requirements

The Northern European market has specifications with regards to legal requirements, quality, labelling, color, design and packaging, the observance of which is necessary for thriving in this market.

Legal Requirements: All products shipped to the European countries must comply with the product safety regulations outlined in the [General Product Safety Directive](#). You are prohibited from using restricted substances in your production per the [REACH](#) (1907/2006) regulation. [POP \(850/2004\) Regulation](#) and National laws prohibit the use of restricted chemicals in textile products.

Labelling Requirements: Textile labelling in the EU is governed by the [Regulation No 1007/2011](#). The regulation requires that textiles available on the market be labelled with the composition of the textile products, using the names specified in the legislation. Although not legally required, it is customary for textile labels in the EU to also include care instructions, size, country of origin.

Sizing: May vary from country to country and from brand to brand but if you're serving the mainstream market, you can use the H&M size guides for [women](#) and [men](#) as a reference or typically you will be given size guidance by your clients. A new sizing standard, EN13402, has been launched in 2017. This standard will lead to conformity in the industry and to clear size indication for consumers, in shops, and especially online. Applying the standard might help you to communicate your sizes, to reduce the return rates and could result in saving money, time and carbon footprint.

Environmental labelling: Manufacturers may also add any additional voluntary labels (e.g. [EU Ecolabel](#), which recognizes good environmental standards and investigates product's environmental impact through its lifecycle; [Öko-Tex](#) labels and certifications confirm the human-ecological safety of textile products; or [Global Organic Textile Standard](#), which is the leading textile processing standard for organic fibers, including ecological and

social criteria).

Packaging: EU packaging requirements aim at reducing waste and recycling packaging materials and is governed by the [Directive 94/62/EC](#) on packaging and packaging waste, which restricts the use of certain heavy metals in packaging materials. Some countries in the EU, have their own requirements for recycling the packaging, i.e. the [Grüne Punkt](#) in Germany, [Grønt Punkt](#) in Norway and [TRIMAN](#) in France. Retailers often ask their suppliers to package products for sale in shops. Typically, UV-resistant polybags are used to prevent denim from fading due to light exposure.

Tips for exporters:

- Study the General Product Safety Directive and the REACH regulation as well as all other regulations mentioned in the above section, to make sure that your products and production are compliant with the European market standard.
- Develop a chemical management system in your factory. Collect MSDS, TDC, ZDHC and other relevant declarations for every chemical used and work only with reputed chemical brands.
- Make sure that your labelling is compliant with the EU regulations and contains the required composition of the product.
- Include information on textile fiber name, product care ([Ginetex symbols](#)), size, country of origin on the label.
- You must follow precisely your buyers' requirements on sizes, colors and styles. Read more about how buyers/importers list their requirements in contracts on the [CBI website](#).
- Package the denim in polybags to prevent the color from altering. Do not use polybags that contain polyvinylchloride (PVC), as their use is restricted in some countries in Europe.
- Offering to provide packaging for the clients may strengthen your competitive position. Be ready to accommodate different instructions and preferences regarding packaging, including boxing dimensions and materials, polybag formats and quality and bar code positioning.

9. Conclusion

Northern European countries, and especially Germany, the Netherlands and the UK constitute large and dynamic markets for fashion and denim exporters. Currently, Morocco's fashion and denim exports to this group of countries are minimal despite the country's dynamic and experienced textile industry. Morocco can capitalize on this market potential by using its proximity to Europe, low labor costs, and duty-free trade. It is essential, however, that it professionalizes its sustainability, local raw materials supply such as yarns and fabric, compliance, innovation, design and marketing capabilities and starts proactively reaching out to Northern European clients with its professional offer in addition to finding other, more structured ways, of advertising the Moroccan textile and denim sector. Going forward, it will be important for the industry to improve its high value and value-added offering to move up the value chain and secure more clients and better unit pricing.

10. Annex I: Product codes

Denim Codes:

Prodcom

14132442 - Men's or boy's trousers & breeches, of denim

14133542 - Women's or girl's trousers & breeches, of denim

Harmonised system

62034231 - Men's or boy's trousers & breeches, of denim

62046231 - Women's or girl's trousers & breeches, of denim

Home Textiles Codes:

Prodcom

13921230 - Bed linen of knitted or crocheted

13921253 - Bed linen of cotton

13921255 - Bed linen of flax or ramie

13921259 - Bed linen of woven textiles

13921270 - Bed linen of non-woven man-made fibers

13921330 - Table linen of knitted or crocheted textiles

13921353 - Table linen of cotton

13921355 - Table linen of flax

13921359 - Table linen of woven man-made fibers and of other woven or non-woven textiles

13921370 - Table linen of non-woven man-made fibers

13921430 - Toilet linen and kitchen linen, of terry toweling or similar terry fabrics of cotton

13921450 - Woven toilet linen and kitchen linen, of textiles

13921470 - Toilet linen and kitchen linen, of non-woven man-made fibers

13921530 - Curtains and interior blinds, curtain or bed valances, of knitted or crocheted materials

13921550 - Curtains and interior blinds, curtain or bed valences, of woven materials

13921570 - Curtains or interior blinds, curtain or bed valences, of non-woven materials

Harmonized system

63021000 - Bed linen, knitted or crocheted

63022100 - Printed Bedlinen of cotton

63022210 – Printed Bedlinen of nonwovens of man-made fibers

63022290 – Printed Bedlinen of man-made fibers

63022910 – Printed Bedlinen of flax or ramie

63022990 – Printed Bedlinen of textile materials

63023100 – Bedlinen of cotton

63023110 – Bedlinen of cotton mixed with flax

63023210 – Bedlinen of nonwovens of man-made fibers

63023290 – Bedlinen of man-made fibers

63023920 – Bedlinen of flax or ramie

63023990 – Bedlinen of textile materials

63024000 – Table linen, knitted or crocheted

63025100 – Table linen of cotton

63025110 – Table linen made of cotton mixed with flax

63025310 – Table linen of nonwovens of man-made fibers

63025390 – Table linen of man-made fibers

63025910 – Table linen of flax

63025990 – Table linen of textile materials

63026000 – Toilet linen and kitchen linen, of terry toweling or similar terry fabrics of cotton

63029100 – Toilet linen and kitchen linen of cotton

63029310 – Toilet linen and kitchen linen of nonwovens of manmade fibers

63029390 – Toilet linen and kitchen linen of man-made fibers

63029910 – Toilet linen and kitchen linen of flax

63029990 – Toilet linen and kitchen linen of textile materials

63031200 – Curtains, incl. drapes and interior blinds, curtain or bed valances of synthetic fibers, knitted or crocheted

63031900 – Curtains, incl. drapes and interior blinds, curtain or bed valances knitted or crocheted

63039100 – Curtains, incl. drapes and interior blinds, curtain or bed valances of cotton

63039210 – Curtains, incl. drapes and interior blinds, curtain or bed valances of nonwovens or synthetic fibers

63039290 – Curtains, incl. drapes and interior blinds, curtain or bed valances of synthetic fibers

63039910 – Curtains, incl. drapes and interior blinds, curtain or bed valances of nonwovens

63033990 – Curtains, incl. drapes and interior blinds, curtain or bed valances of textile materials

63041100 – Knitted or crocheted bedspreads

63041910 – Bedspreads of cotton

63041930 – Bedspreads of flax and ramie

63041990 – Bedspreads of textile materials

Technical Textiles Codes:

Prodcom

14121120 – Men's or boys' ensembles, of cotton or man-made fibers, for industrial or occupational wear

14121130 – Men's or boys' jackets and blazers, of cotton or man-made fibers, for industrial or occupational wear

14121240 – Men's or boys' trousers or breeches, of cotton or man-made fibers, for industrial or occupational wear

14121250 – Men's or boys' bib and brace overalls, of cotton or man-made fibers, for industrial or occupational wear

14122120 – Women's or girls' ensembles, of cotton or man-made fibers, for industrial or occupational wear

14122130 – Women's or girls' jackets and blazers, of cotton or man-made fibers, for industrial or occupational wear

14122240 – Women's or girls' trousers or breeches, of cotton or man-made fibers, for industrial or occupational wear

14122250 – Women's or girls' bib and brace overalls, of cotton and man-made fibers, for industrial or occupational wear

14123013 – Men's or boys' other garments, of cotton or man-made fibers, for industrial or occupational wear

14123023 – Women's or girls' other garments, of cotton or man-made fibers, for industrial or occupational wear

Harmonized system

62032210 – Men's or boys' industrial and occupational ensembles of cotton

62032310 – Men's or boys' industrial and occupational ensembles of synthetic fibers

62032911 – Men's or boys' industrial and occupational ensembles of artificial fibers

62033210 – Men's or boys' jackets and blazers of cotton, industrial and occupational

62033310 – Men's or boys' jackets and blazers of synthetic fibers, industrial and occupational

62033911 – Men's or boys' jackets and blazers of artificial fibers, industrial and occupational

62034211 – Men's or boys' industrial and occupational trousers and breeches of cotton

62034251 – Men's or boys' bib and brace overalls, of cotton, industrial and occupational

62034311 – Men's or boys' trousers and breeches of synthetic fibers, industrial and occupational

62034331 – Men's or boys' bib and brace overalls, of synthetic fibers, industrial and occupational

62034911 – Men's or boys' trousers and breeches, of artificial fibers, industrial and occupational

62034931 – Men's or boys' bib and brace overalls, of artificial fibers, industrial and occupational

62042210 – Women's or girls' industrial and occupational ensembles of cotton

62042310 – Women's or girls' industrial and occupational ensembles of synthetic fibers

62042911 – Women's or girls' industrial and occupational ensembles of artificial fibers

62043210 – Women's or girls' jackets and blazers of cotton, industrial and occupational

62043310 – Women's or girls' jackets and blazers of synthetic fibers, industrial and occupational

62043911 – Women's or girls' jackets and blazers of artificial fibers, industrial and occupational

62046211 – Women's or girls' industrial and occupational trousers and breeches of cotton

62046251 – Women's or girls' bib and brace overalls, of cotton, industrial and occupational

62046311 – Women's or girls' trousers and breeches of synthetic fibers, industrial and occupational

62046331 – Women's or girls' bib and brace overalls, of synthetic fibers, industrial and occupational

62046911 – Women's or girls' trousers and breeches, of artificial fibers, industrial and occupational

62046931 – Women's or girls' bib and brace overalls, of artificial fibers, industrial and occupational

62113210 – Men's or Boys' industrial and occupational clothing of cotton

62113310 – Men's or Boys' industrial and occupational clothing of man-made fibers

62114210 – Women's or girls' aprons, overalls, smock-overalls and other industrial and occupational clothing of cotton

62114310 – Women’s or girls’ aprons, overalls, smock-overalls and other industrial and occupational clothing of man-made

Fast Fashion Codes:

Prodcorn

- 14131270 – Men’s or boys’ trousers, breeches, shorts, bib and brace overalls, of knitted or crocheted textiles
- 14131490 – Women’s or girls’ trousers, breeches, shorts, bib and brace overalls, of knitted or crocheted textiles
- 14132130 – Men’s or boys’ waistcoats, anoraks, ski-jackets, wind-jackets and similar articles
- 14132200 – Men’s or boys’ suits & ensembles
- 14132210 – Men’s or boys’ suits
- 14132300 – Men’s or boys’ jackets and blazers
- 14132444 – Men’s or boys’ trousers, breeches and shorts, of wool or fine animal hair
- 14132445 – Men’s or boys’ trousers and breeches of man-made fibers
- 14132448 – Men’s or boys’ trousers and breeches of cotton
- 14132449 – Men’s or boys’ trousers, breeches, shorts and bib and brace overalls
- 14133130 – Women’s or girls’ waistcoats, anoraks, ski-jackets, wind-jackets and similar articles
- 14133200 – Women’s or girls’ suits & ensembles
- 14133210 – Women’s or girls’ suits
- 14133330 – Women’s or girls’ jackets and blazers
- 14133470 – Women’s or girls’ dresses
- 14133480 – Women’s or girls’ skirts or divided skirts
- 14133548 – Women’s or girls’ trousers and breeches, of cotton
- 14133549 – Women’s or girls’ trousers and breeches, of wool or fine animal hair or man-made fibers
- 14133569 – Women’s or girls’ trousers, breeches, bib and brace overalls, of textiles
- 14142100 – Men’s or boys’ shirts
- 14142300 – Women’s or girls’ blouses, shirts and shirt-blouses
- 14391061 – Men’s or boys’ jerseys, pullovers, sweatshirts, waistcoats and cardigans, of cotton

14391062 – Women’s or girls’ jerseys, pullovers, sweatshirts, waistcoats and cardigans, of cotton

14391071 – Men’s or boys’ jerseys, pullovers, sweatshirts, waistcoats and cardigans, of man-made fibers

14391072 – Women’s or girls’ jerseys, pullovers, sweatshirts, waistcoats and cardigans, of man-made fibers

14391090 – Jerseys, pullovers, sweatshirts, waistcoats and cardigans, of textile materials

Harmonized system

62019100 – Men’s or boys’ anoraks incl. ski jackets, windcheaters, wind-jackets and similar articles of wool or fine animal hair

62019200 – Men’s or boys’ anoraks incl. ski jackets, windcheaters, wind-jackets and similar articles of cotton

62019300 – Men’s or boys’ anoraks incl. ski jackets, windcheaters, wind-jackets and similar articles of man-made fibers

62019900 – Men’s or boys’ anoraks incl. ski jackets, windcheaters, wind-jackets and similar articles of textile materials

62029100 – Women’s or girls’ anoraks incl. ski jackets, windcheaters, wind-jackets and similar articles of wool or fine animal hair

62029200 – Women’s or girls’ anoraks incl. ski jackets, windcheaters, wind-jackets and similar articles of cotton

62029300 – Women’s or girls’ anoraks incl. ski jackets, windcheaters, wind-jackets and similar articles of man-made fibers

62029900 – Women’s or girls’ anoraks incl. ski jackets, windcheaters, wind-jackets and similar articles of textile materials

62031100 – Men’s or boys’ suits of wool or fine animal hair

62031200 – Men’s or boys’ suits of synthetic fibers

62031910 – Men’s or boys’ suits of cotton

62031930 – Men’s or boys’ suits of artificial fibers

62031990 – Men’s or boys’ suits of textile materials

62041990 – Women’s or girls’ suits of textile materials

62033100 – Men’s or boys’ jackets and blazers of wool or fine animal hair

62033290 – Men’s or boys’ jackets and blazers of cotton

62033390 – Men’s or boys’ jackets and blazers of synthetic fibers

62033919 – Men's or boys' jackets and blazers of artificial fibers

62033990 – Men's or boys' jackets and blazers of textile materials

62034110 – Men's or boys' trousers or breeches of wool or fine animal hair

62034233 – Men's or boys' trousers or breeches of cotton cut corduroy

62034235 – Men's or boys' trousers or breeches of cotton

62034319 – Men's or boys' trousers or breeches of synthetic fibers

62034919 – Men's or boys' trousers or breeches of artificial fibers

62034990 – Men's or boys' trousers, bib and brace overalls, breeches and shorts of textile materials

62041100 – Women's or girls' suits of wool or fine animal hair

62041200 – Women's or girls' suits of cotton

62041300 – Women's or girls' suits of synthetic fibers

62041910 – Women's or girls' suits of artificial fibers

62043100 – Women's or girls' jackets and blazers of wool or fine animal hair

62043290 – Women's or girls' jackets and blazers of cotton

62043390 – Women's or girls' jackets and blazers of synthetic fibers

62043919 – Women's or girls' jackets and blazers of artificial fibers

62043990 – Women's or girls' jackets and blazers of textile materials

62044100 – Women's or girls' dresses of wool or fine animal hair

62044200 – Women's or girls' dresses of cotton

62044300 – Women's or girls' dresses of synthetic fibers

62044400 – Women's or girls' dresses of artificial fibers

62044900 – Women's or girls' dresses of textile materials

62044910 – Women's or girls' dresses of textile materials, of silk or silk waste

62044990 – Women's or girls' dresses of textile materials

62045100 – Women's or girls' skirts and divided skirts of wool or fine animal hair

62045200 – Women's or girls' skirts and divided skirts of cotton

62045300 – Women's or girls' skirts and divided skirts of synthetic fibers

62045910 – Women's or girls' skirts and divided skirts of artificial fibers

62045990 – Women's or girls' skirts and divided skirts of textile materials

62046110 – Women's or girls' trousers or breeches of wool or fine animal hair

62046233 – Women's or girls' trousers or breeches of cotton cut corduroy

62046235 – Women's or girls' trousers or breeches of cotton

62046239 – Women's or girls' trousers and breeches, of cotton

62046318 – Women's or girls' trousers or breeches of synthetic fibers

62046319 – Women's or girls' trousers or breeches of synthetic fibers

62046918 – Women's or girls' trousers or breeches of artificial fibers

62046919 – Women's or girls' trousers or breeches of artificial fibers

62046990 – Women's or girls' trousers, bib and brace overalls, breeches and shorts of textile materials

62051000 – Men's or boys' shirts of wool or fine animal hair

62052000 – Men's or boys' shirts of cotton

62053000 – Men's or boys' shirts of man-made fibers

62059010 – Men's or boys' shirts of flax or ramie

62059080 – Men's or boys' shirts of textile materials

62059090 – Men's or boys' shirts of textile materials

62061000 – Women's or girls' blouses, shirts and shirt-blouses of silk and silk waste

62062000 – Women's or girls' blouses, shirts and shirt-blouses of wool or fine animal hair

62063000 – Women's or girls' blouses, shirts and shirt-blouses of cotton

62064000 – Women's or girls' blouses, shirts and shirt-blouses of man-made fibers

62069010 – Women's or girls' blouses, shirts and shirt-blouses of flax or ramie

62069090 – Women's or girls' blouses, shirts and shirt-blouses of textile materials

Knitwear Codes:

Prodcod

14131110 – Men's or boys' overcoats, car-coats, capes, cloaks and similar articles, of knitted or crocheted textiles

14131120 – Men's or boys' waistcoats, anoraks, ski-jackets, wind-cheaters, wind-jackets and similar articles, of knitted or crocheted textiles

14131230 – Men's or boy's jackets and blazers, of knitted and crocheted textiles

14131260 – Men's or boys' suits and ensembles, of knitted or crocheted textiles

14131310 – Women's or girls' overcoats, car-coats, capes, cloaks and similar articles, of knitted and crocheted textiles

14131320 – Women's or girls' waistcoats, anoraks, ski-jackets, wind-cheaters, wind-jackets and similar articles, of knitted and crocheted textiles

14131430 – Women's or girls' jackets and blazers, of knitted or crocheted textiles

14131460 – Women's or girls' suits and ensembles, of knitted or crocheted textiles

14131470 – Women's or girls' dresses, of knitted or crocheted textiles

14131480 – Women's and girls' skirts or divided skirts, of knitted or crocheted textiles

14141100 – Men's or boy's shirts, knitted or crocheted

14141310 – Women's or girls' blouses, shirts and shirt-blouses of knitted or crocheted textiles

14143000 – T-shirts, singlets and vests, knitted or crocheted

14391031 – Men's or boys' jerseys, pullovers, sweatshirts, waistcoats and cardigans, of wool or fine animal hair

14391032 – Women's or girls' jerseys, pullovers, sweatshirts, waistcoats and cardigans, of wool or fine animal hair

14391033 – Jerseys and pullovers, containing $\geq 50\%$ by weight of wool and weighing $\geq 600\text{g}$ per article

14391053 – Lightweight fine knit roll, polo or turtle neck jumpers and pullovers of cotton

14391055 – Lightweight fine knit roll, polo or turtle neck jumpers and pullovers, of man-made fibers

Harmonized system

61011090 – Men's or boys' anoraks incl. ski jackets, windcheaters, wind-jackets and similar articles of wool or fine animal hair, knitted or crocheted

61012090 – Men's or boys' anoraks incl. ski jackets, windcheaters, wind-jackets and similar articles of cotton, knitted or crocheted

61013090 – Men's or boys' anoraks incl. ski jackets, windcheaters, wind-jackets and similar articles of man-made fibers, knitted or crocheted

61019080 – Men's or boys' anoraks incl. ski jackets, windcheaters, wind-jackets and similar articles of textile materials, knitted or crocheted

61019090 – Men's or boys' anoraks incl. ski jackets, windcheaters, wind-jackets and similar articles of textile materials, knitted or crocheted

61021090 – Women's or girls' anoraks incl. ski jackets, windcheaters, wind-jackets and similar articles of wool or fine animal hair, knitted or crocheted

61022090 – Women's or girls' anoraks incl. ski jackets, windcheaters, wind-jackets and similar articles of cotton, knitted or crocheted

61023090 – Women's or girls' anoraks incl. ski jackets, windcheaters, wind-jackets and similar articles of man-made fibers, knitted or crocheted

61029090 – Women's or girls' anoraks incl. ski jackets, windcheaters, wind-jackets and similar articles of textile materials, knitted or crocheted

61031000 – Men's or boys' suits of textile materials, knitted or crocheted

61031010 – Men's or boys' suits of textile materials, knitted or crocheted, of wool or fine animal hair

61031090 – Men's or boys' suits of textile materials, knitted or crocheted

61031100 – Men's or boys' suits of wool or fine animal hair, knitted or crocheted

61031200 – Men's or boys' suits of synthetic fibers, knitted or crocheted

61031900 – Men's or boys' suits of textile materials, knitted or crocheted

61041990 – Women's or girls' suits of textile materials, knitted or crocheted

61033100 – Men's or boys' jackets and blazers of wool or fine animal hair, knitted or crocheted

61033200 – Men's or boys' jackets and blazers of cotton, knitted or crocheted

61033300 – Men's or boys' jackets and blazers of synthetic fibers, knitted or crocheted

61033900 – Men's or boys' jackets and blazers of textile materials, knitted or crocheted

61034100 – Men's or boys' trousers, bib and brace overalls, breeches and shorts of wool or fine animal hair, knitted or crocheted

61034110 – Men's or boys' trousers and breeches, of wool or fine animal hair, knitted or crocheted

61034200 – Men's or boys' trousers, bib and brace overalls, breeches and shorts of cotton, knitted or crocheted

61034210 – Men's or boys' trousers and breeches of cotton, knitted or crocheted

61034300 – Men's or boys' trousers, bib and brace overalls, breeches and shorts of synthetic fibers, knitted or crocheted

61034310 – Men's or boys' trousers and breeches of synthetic fibers, knitted or crocheted

61034900 – Men's or boys' trousers, bib and brace overalls, breeches and shorts of textile materials, knitted or crocheted

61034910 – Men's or boys' trousers and breeches of textile materials, knitted or crocheted

61041100 – Women's or girls' suits of wool or fine animal hair, knitted or crocheted

61041200 – Women's or girls' suits of cotton, knitted or crocheted

61041300 – Women's or girls' suits of synthetic fibers, knitted or crocheted

61041900 – Women's or girls' suits of textile materials, knitted or crocheted

61041920 – Women's or girls' suits of textile materials, knitted or crocheted, of cotton

61043100 – Women's or girls' jackets and blazers of wool or fine animal hair, knitted or crocheted

61043200 – Women's or girls' jackets and blazers of cotton, knitted or crocheted

61043300 – Women's or girls' jackets and blazers of synthetic fibers, knitted or crocheted

61043900 – Women's or girls' jackets and blazers of textile materials, knitted or crocheted

61044100 – Women's or girls' dresses of wool or fine animal hair, knitted or crocheted

61044200 – Women's or girls' dresses of cotton, knitted or crocheted

61044300 – Women's or girls' dresses of synthetic fibers, knitted or crocheted

61044400 – Women's or girls' dresses of artificial fibers, knitted or crocheted

61044900 – Women's or girls' dresses of textile materials, knitted or crocheted

61045100 – Women's or girls' skirts and divided skirts of wool or fine animal hair, knitted or crocheted

61045200 – Women's or girls' skirts and divided skirts of cotton, knitted or crocheted

61045300 – Women's or girls' skirts and divided skirts of synthetic fibers, knitted or crocheted

61045900 – Women's or girls' skirts and divided skirts of textile materials, knitted or crocheted

61046100 – Women's or girls' trousers, bib and brace overalls, breeches and shorts of wool or fine animal hair, knitted or crocheted

61046110 – Women's or girls' trousers and breeches, of wool or fine animal hair, knitted or crocheted

61046200 – Women's or girls' trousers, bib and brace overalls, breeches and shorts of cotton, knitted or

crocheted

61046210 – Women's or girls' trousers and breeches of cotton, knitted or crocheted

61046300 – Women's or girls' trousers, bib and brace overalls, breeches and shorts of synthetic fibers, knitted or crocheted

61046310 – Women's or girls' trousers and breeches of synthetic fibers, knitted or crocheted

61046900 – Women's or girls' trousers, bib and brace overalls, breeches and shorts of textile materials, knitted or crocheted

61046910 – Women's or girls' trousers and breeches of textile materials, knitted or crocheted

61051000 – Men's or boys' shirts of cotton, knitted or crocheted

61052010 – Men's or boys' shirts of synthetic fibers, knitted or crocheted

61052090 – Men's or boys' shirts of artificial fibers, knitted or crocheted

61059010 – Men's or boys' shirts of wool or fine animal hair, knitted or crocheted

61059090 – Men's or boys' shirts of textile materials, knitted or crocheted

61061000 – Women's or girls' blouses, shirts and shirt-blouses of cotton, knitted or crocheted

61062000 – Women's or girls' blouses, shirts and shirt-blouses of man-made fibers, knitted or crocheted

61069010 – Women's or girls' blouses, shirts and shirt-blouses of wool or fine animal hair, knitted or crocheted

61069030 – Women's or girls' blouses, shirts and shirt-blouses of silk or silk waste, knitted or crocheted

61069050 – Women's or girls' blouses, shirts and shirt-blouses of flax or ramie, knitted or crocheted

61069090 – Women's or girls' blouses, shirts and shirt-blouses of textile materials, knitted or crocheted

61091000 – T-shirts, singlets and other vests of cotton, knitted or crocheted

61099010 – T-shirts, singlets and other vests of wool or fine animal hair, knitted or crocheted

61099020 – T-shirts, singlets and other vests of wool or fine animal hair or man-made fibers, knitted or crocheted

61099030 – T-shirts, singlets and other vests of man-made fibers, knitted or crocheted

61099090 – T-shirts, singlets and other vests of textile materials, knitted or crocheted

61101031 – Men's or boys' jerseys, pullovers, cardigans, waistcoats and similar articles, of wool, knitted or crocheted

61101035 – Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted from fine hair of cashmere goats, for men or boys

61101038 – Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted from fine hair of fine animal other than cashmere goats, for men or boys

61101039 – Men's or boys' jerseys, pullovers, cardigans, waistcoats and similar articles, of fine animal hair, knitted or crocheted

61101091 – Women's or girls' jerseys, pullovers, cardigans, waistcoats and similar articles, of wool, knitted or crocheted

61101095 – Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted from fine hair of cashmere goats, for women or girls

61101098 – Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted from fine hair of fine animal other than cashmere goats, for women or girls

61101099 – Women's or girls' jerseys, pullovers, cardigans, waistcoats and similar articles, of fine animal hair, knitted or crocheted

61101130 – Men's or boys' jerseys, pullovers, cardigans, waistcoats and similar articles, of wool, knitted or crocheted

61101190 – Women's or girls' jerseys, pullovers, cardigans, waistcoats and similar articles, of wool, knitted or crocheted

61101210 – Jerseys, pullovers, cardigans, waistcoats and similar articles, of hair of Kashmir "cashmere" goats, knitted or crocheted, for men or boys

61101290 – Jerseys, pullovers, cardigans, waistcoats and similar articles, of hair of Kashmir "cashmere" goats, knitted or crocheted, for women or girls

61101910 – Jerseys, pullovers, cardigans, waistcoats and similar articles, of fine animal hair, knitted or crocheted, for men or boys

61101990 – Jerseys, pullovers, cardigans, waistcoats and similar articles, of fine animal hair, knitted or crocheted, for women or girls

61102091 – Men's or boys' jerseys, pullovers, cardigans, waistcoats and similar articles, of cotton, knitted or crocheted

61102099 – Women's or girls' jerseys, pullovers, cardigans, waistcoats and similar articles, of cotton, knitted or crocheted

61103091 – Men's or boys' jerseys, pullovers, cardigans, waistcoats and similar articles, of man-made fibers, knitted or crocheted

61103099 – Women's or girls' jerseys, pullovers, cardigans, waistcoats and similar articles, of man-made fibers, knitted or crocheted

61109010 – Jerseys, pullovers, cardigans, waistcoats and similar articles, of flax or ramie, knitted or crocheted

61109090 – Jerseys, pullovers, cardigans, waistcoats and similar articles, of textile materials, knitted or crocheted

11. Annex II: Trade fairs and fashion shows

GERMANY:

Fashion:

[Bread&Butter by Zalando](#), Berlin - This is one of the most important fashion shows, 31.08.2018-02.09.2018

[Gallery](#), Düsseldorf - 26-28 January 2019,

[Premium](#), Berlin, 15-17 January 2019, fashion trade show.

[SEEK](#), Berlin, 15-17 January 2019, fashion trade under the umbrella of the PREMIUM Group and Shows

[Kind + Jugend Köln](#), Cologne, 20-23 September 2018

[ISPO](#), Munich, 4-5 February 2019, Sport Clothing Trade Fair

[Panorama](#), Berlin, 15-17 January 2019

Textiles/Fabric:

[Munich Fabric Start](#), Munich, textile trade show, 4-6 September 2018, focus on fabrics mainly.

Home Textiles:

[Heimtextil](#), Int'l Trade Fair for Home and Contract Textiles, January 08-11, 2019, Frankfurt/Main, Germany

Technical Textile:

[Mtex](#), 29-30 May 2018, Chemnitz

[TechTextil](#), Frankfurt, 14-17 May 2019, focus on the machinery, nevertheless, some companies who offer technical textiles

[Texcare International](#), Frankfurt, 20-24 June 2020, focus on the machinery, nevertheless, some companies who offer technical textiles

THE NETHERLANDS:

Fashion:

[Kinpins Denim Show Amsterdam](#): Amsterdam, 24 October 2018

[Modefabriek](#), Amsterdam, 20-21 January 2019

[IAF World Fashion Convention](#), Maastricht, 9-10 October 2018

Textiles/Fabric:

[Fabrics& More](#), Houten, 16 - 17 September 2018

THE UNITED KINGDOM

Fashion:

[Denim Premiere Vision](#), London, the fashion & culture denim event, 5-6 December 2018

[JACKET REQUIRED LONDON](#), London, 23-24 January 2019, fashion trade show

[Moda Gent](#), Birmingham, 17-19 February 2019, fashion trade event

[Pure London](#), London, 10-12 February 2019 and August 2019

Textiles/Fabric:

[The Knitting & Stitching Show](#), 11-14 Oct, 2018, London

[The London Textile Fair](#), 9/10 January 2019, London

DENMARK:

Fashion:

[Revolver Copenhagen International Fashion Fair \(CIFF\)](#), Copenhagen, 30 Jan-01 February 2019

[Copenhagen Fashion Week](#), Copenhagen

[Fashion Fair Vejle](#), Vejle, 24th - 26th February 2019, 25th - 27th August 2019

SWEDEN

Fashion:

[Stockholm Fashion Week](#), 28-29 August 2018, Stockholm

[Fashion Business days](#), 6-8th of February, 2019, Stockholm

[Stockholm Show Room](#), 1-2 October 2018, Stockholm

Fabric/Textiles:

[PREVIEW FABRICS & ACCESSORIES](#), 4 December 2018, Stockholm

FINLAND

Fashion:

[I Love me](#), Helsinki, 19-21 October 2018, exhibition for beauty, health, fashion, jewellery

[Helsinki Fashion Week](#), Helsinki, 20-25, July 2018

NORWAY

Fashion:

[Moteforum](#), Oslo, 13 and 14 September 2018

[Minimessa](#), rotating in Bergen, Trondheim and Tromsø, April and October

[NORSPOMESSEN](#), 24-25 June 2018, Skjetten, Sport Trade fair (including sportswear)

Fabric/Textiles:

[Oslo Design Fair](#) , 29 August- 1 September

OTHER EUROPEAN COUNTRIES

FRANCE

[Texworld Denim](#), Paris, 11-14 February 2019

ITALY

[PITTI IMMAGINE UOMO](#), (Florence) 8-11 January 2019

Pitti Bimbo, 17-19 January 2019, trade show for kids fashion

ROTATING:

Premium International Fashion Show:

Denim Premiere Vision: Fashion and Culture denim event

Stoffen spektakel (rotating in the Netherlands, Belgium Luxembourg)

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