

Silk clothing accessories

EEC Overview
France
Switzerland

Silk clothing accessories - EEC Overview

Product description	HS 6213.10	Handkerchiefs of silk or silk waste
	HS 6214.10	Shawls, scarves, mufflers, mantillas, veils and the like of silk or silk waste
	HS 6215.10	Ties, bow ties and cravats of silk or silk waste

Imports and exports, 1989-1991 (ECU million)

	1989	1990	1991
Total imports	278.2	292.4	266.4
Total exports	576.1	573.5	514.3

Source: Eurostat-COMEXT

Conversion rate:

US\$ 1 = ECU 0.91 0.78 0.80

(See the appendix for imports of silk accessories 1989-1991 and suppliers of silk accessories to the EEC in 1991.)

Market characteristics

Clothing accessories are made of various materials, including silk, cotton, wool and fine animal hair, synthetic and artificial fibres, and fibres such as linen. This brief will focus on accessories made of silk, both because the demand for ties (primarily) and shawls is substantial and because these categories are increasingly mass-marketed.

The share of each material in imported products was as follows in 1991 (with the figure for 1990 in brackets).

Handkerchiefs: cotton 80% (47%), silk 9% (28%), other textile materials 11% (25%).

Shawls: silk 31% (41%), synthetic fibres 38% (32%), wool and fine animal hair 16% (16%), other textile materials 6% (8%), artificial fibres 9% (3%).

Ties, bow-ties and cravats: silk 78% (78%), man-made fibres 18% (8%), other textile materials 4% (4%).

The EEC imports the raw materials and remains primarily a silk-consuming and silk-converting area. The goods it produces are high-quality, with the most famous processing centres located in Italy, France and Switzerland. The market share of developing countries has been expanding rapidly and traditional suppliers are now facing foreign competition.

Designers targeting wealthy clients no longer have a monopoly on supply. However, they are still a major force in the market owing to technical superiority and product ranges that are synonymous with prestige and luxury.

Imports from outside the EEC originate mainly in China, India, Mauritius and countries in South-East Asia. Foreign goods are often manufactured according to importer's specifications.

The range of silk accessories for women is wide and includes various kinds of scarves and shawls, handkerchiefs, gloves, purses, hair accessories, etc. The articles for men are mainly ties, handkerchiefs (both susceptible to changes in fashion), scarves and socks. The market for scarves and ties is dominated by famous European labels.

Depending on the country of destination and the end-use of the product, the blending of silk with other materials such as wool or synthetics is generally acceptable. Pure silk articles are in greater demand at the upper end of the market.

**Market
access**

The rate of duty applied by the EEC to accessories of silk or silk waste is the following (in per cent):

	Autonomous	Conventional
62131000 Handkerchiefs	20	10
62141000 Shawls, scarves, mufflers, mantillas, veils and the like	21	8
62151000 Ties, bow-ties and cravats	21	6.3

Within the Generalized System of Preferences (GSP), imports of silk products from certain developing countries and territories are subject to EEC duty-free ceilings. Details on market access are available in the Official Journal of the European Community No. L 341, of 12 December 1991 and No. L 267, of 14 September 1992.

The International Silk Association has created a silk mark that will gradually be applied on a wider basis. National standards are in force in certain countries. In the United Kingdom, for instance, the members of the Silk Association of Great Britain (SAGB) use a specific label on their products.

Prices	Prices vary according to origin, label, material and outlet. In recent years, the price of silk has fallen owing to several factors, including: the introduction of other types of silk such as sandwashed silk and the increased offer from low labor cost countries. As a result, silk has adopted a new image, one which emphasizes its affordability. (See briefs on individual countries for retail prices.)
Distribution channels	As silk accessories are proving more and more popular, the types of retail outlet in which they are sold are diversifying: large department stores and luxury boutiques, clothes shops, chain stores, gift shops and mail-order houses. Handicraft silk items such as hand-painted handkerchiefs are available in small, often open-air, markets.
Commercial practices	<p>Delivery periods are generally short.</p> <p>A letter of credit is the usual mode of payment. Buying seasons are the same as those for ready-to-wear clothing; traders order two collections per year, namely spring-summer and autumn-winter.</p>
Trade promotion	<p>The International Silk Association is one of the major institutions involved in the promotion of silk articles.</p> <p>Traders in general refer to the need to expand the promotion of silk and the information given to the consumer.</p> <p>Major European trade fairs are organized by the industry on a regular basis. They focus either on fabrics or on fashion accessories. Most exhibitions on ready-to-wear or high fashion products also feature silk products.</p>
Market prospects	<p>Product innovation will help exporters from developing countries to attract new consumers and to enlarge their share of the market.</p> <p>Sericulture is being developed in many countries. In addition to exporting silk as a commodity, several developing countries are now processing it into finished articles and penetrating foreign markets in this way. With the fall in the price of silk over recent years, the target consumer group (including young customers) is fairly large. There is good potential for export growth.</p> <p>It is however important to keep in mind that silk products of poor quality and low prices have little success in the EEC market.</p> <p>Depending on the market segment, other requirements such as prints, colours or various fashion trends should also be carefully considered.</p>

Useful addresses

International Silk Association
34, rue de la charité
69002 Lyon
France
Tel: 78 42 10 79
Fax: 78 37 56 72

Centre textile de conjoncture
et de l'observation économique
37-39, rue de Neuilly
B.P. 249
92113 Clichy Cédex
France
Tel: 47 56 30 30
Tlx: 613738

Unitex
55, Montée de Choulans
69323 Lyon Cédex
France
Tel: 78 42 29 53
Fax: 78 42 73 80

Verband der Deutschen
Seiden-und Samtindustrie
Von Beckerathstrasse 11
4150 Krefeld 1
Germany
Tel: 2151/173138
Tlx: 53854 g

Vereinigung Deutscher
Rohseiden-Handler
c/o firma Hugo Offermann
Postfach 201013
5600 Wuppertal 22
Germany
Tel: 202/602061
Tlx: 8591762

Fédération française de la
couture, du prêt-à-porter,
des couturiers et des créateurs
de mode
100, Faubourg Saint-Honoré
75008 Paris
France
Tel: 1/42 66 64 44

Fédération nationale de
l'habillement, nouveautés et
accessoires
18, rue des bons-enfants
75001 Paris
Tel: 1/42 02 17 69

I. T. F. Lyon
(Institut textile de France)
Avenue Guy de Collongue
B.P. 60
69130 Ecully
France
Tel: 78 33 34 55
Tlx: 330316
Fax: 78 43 39 66

Tie Manufacturers Association
14-16 Cockspur Street
London SW1Y 5BL
Tel: 071/9309941

Silk Ass. of Great Britain
c/o Rheinbergs Ltd
Morley Road
Tonbridge, Kent TN9 1RN
United Kingdom
Tel: 732/351357
Tlx: 95311
Fax: 732/770217

The Textile Distributors Ass.
The Old Post Office, Dunchideock
Exeter EX2 9TU
United Kingdom
Tel: 039/2832559

Servicio Comercial de la Industria
Sedera
Alta de San Pedro, 1
Barcelona
Spain
Tel: 93/3184320

Associazione serica fra
esportatori, importatori ed
ausiliari
Corso Venezia, 47/49
Milan
Italy
Tel: 02/7750320
Tlx: 313594 Attn. Serica
Fax: 02/76005543

Organisation européenne du
commerce de gros en textile
Adriaan Goekooplaan 5
2517 JX The Hague
The Netherlands
Tel: 70/3546811
Tlx: 31440
Fax: 70/3512777

C.I.T.H.
24, rue Montoyer
Brussels
Belgium
Tel: 02/2307629

Associazione Serica Italiana
Ufficio Italiano Sete
Via Odescalchi, 17
22100 Como
Italy
Tel: 31/26 03 60
Tlx: 380311
Fax: 031/30 06 78

Chambre professionnelle des
agents en textile et branches
annexes
43, rue du Tournoi
1190 Brussels
Belgium
Tel: 02/647 86 60

Specialized publications

International Textiles
33 Bedford Place
London WC1B 5JX
Tel: 071/6372211
Tlx: 8954884
Fax: 071/6372248

Seiden Journal
Klaus P. Schruller
Stephanienstrasse 7
Düsseldorf
Germany

Selected trade fairs

Accenta
Fashion and Accessories
Trade Fair (Annual)
Messe Halle beim Mode Centrum Hamburg
Modering 1a
2000 Hamburg 61
Germany
Tel: 040/55066061
Fax: 040/55901175

Interstoff
International Trade Fair for
Clothing Textiles (semi-annual)
Messe Frankfurt GmbH
Postfach 150210
6000 Frankfurt 1
Germany
Tel: 069/75750
Tlx: 411558
Fax: 069/75756433

Bijoutex in Munich
Trade Exhibition for Costume
Jewellery, Fashion Accessories,
Young Fashion, Chemist's Articles
and Gifts (Twice a year)
Heinz Kohl Fachausstellungen GmbH
Postfach 1304
7065 Winterbach
Germany
Tel: 07181/700954
Fax: 07181/700955

The Harrogate Gift Fair
(Annual)
Blenheim Exclusively Ltd
Blenheim House
630 Chiswick High Road
London W4 5RY
United Kingdom
Tel: 081/7422828
Fax: 081/7473856

Bijoutex in Stuttgart
(Same exhibition as above,
semi-annual)

Première Classe
Fashion Accessories Show
(Twice a year)
10, rue du Louvois
75002 Paris
Tel: 1/42 86 94 87
Fax: 1/42 86 89 56

Sevendale Fashion Accessories Fair
Solway Exhibition Centre
Dale Street
Manchester, M1 2HR
United Kingdom
Contact: Mr. M. Plant
Tel: 061/2367569
Fax: 061/2365350

Salon international de
l'habillement masculin
8, rue Richelieu
75001 Paris
Tel: 1/42 96 15 25
Tlx: 220882
Fax: 1/42 61 77 03

Salon international du
prêt-à-porter féminin et salon
boutique
5, rue Caumartin
75009 Paris
Tel: 1/42 68 08 40
Fax: 42 68 06 45

Bibliography and sources of information

- Silk Review: a survey of international trends in production and trade. International Trade Centre UNCTAD/GATT, 1992.
- Reflections on silk. Report on the International Silk Forum, Hämeenlinna, Finland, 12-15 October 1990. PRODEC in cooperation with the International Trade Centre UNCTAD/GATT, the International Silk Association, the World of Silk.
- Serica Ltd and the Hämeenlinna Fair Ltd.
- The silk trade - Lucrative profits await exporters with the right types of products. FORUM, October-December 1988, International Trade Centre UNCTAD/GATT.
- Directory of the International Silk Association.
- "Prospects for silk in the last decade of the 20th century". Monthly Newsletter, International Silk Association, No 145, October 1991.
- Textile Outlook International. Business and market analysis for the textile industry. The Economist Intelligence Unit. London.
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ITC/MBDBS - October 1992

This market brief has not been formally edited by ITC.

Appendix

European Economic Community: Imports of silk accessories, 1989-1991
(V: ECU '000; Q: metric tons; SU: no. of pieces)

HS 6213.10	1989			:	1990			:	1991		
	V	Q	SU		V	Q	SU		V	Q	SU
TOTAL EEC	8,459	86	6,048,698	:	6,776	68	4,914,339	:	5,228	55	5,695,520
of which:				:				:			
FR GERMANY	3,126	22	3,027,046	:	2,205	28	3,255,604	:	2,022	29	2,704,247
ITALY	220	0	68,508	:	229	1	139,214	:	438	5	1,423,878
SPAIN	484	6	536,124	:	726	6	463,437	:	543	6	789,353
FRANCE	2,058	15	944,291	:	1,941	10	486,545	:	1,170	6	367,210
UNITED KINGDOM	1,821	36	1,144,419	:	1,138	20	393,104	:	464	4	217,355
BELG.-LUXBG.	301	2	89,165	:	201	0	46,010	:	277	2	60,556
NETHERLANDS	190	3	138,912	:	100	1	61,610	:	91	1	51,211
GREECE	52	0	15,013	:	36	1	10,350	:	70	0	24,228
PORTUGAL	121	0	42,197	:	127	0	29,571	:	88	0	24,178
IRELAND	81	2	39,800	:	65	1	25,542	:	38	1	18,497
DENMARK	5	0	3,223	:	8	0	3,352	:	27	1	14,807

HS 6214.10	1989			:	1990			:	1991		
	V	Q	SU		V	Q	SU		V	Q	SU
TOTAL EEC	148,188	852	22,091,555	:	142,447	769	19,363,835	:	98,452	661	16,234,833
of which:				:				:			
FR GERMANY	32,220	241	7,552,827	:	34,132	275	9,936,792	:	35,986	330	9,728,129
UNITED KINGDOM	22,276	252	8,160,231	:	18,079	183	3,855,920	:	13,321	117	2,613,943
FRANCE	73,309	264	3,839,541	:	65,616	202	3,203,064	:	26,602	105	1,642,892
ITALY	6,625	14	655,284	:	8,353	17	741,586	:	6,830	13	704,155
SPAIN	5,317	32	541,368	:	7,660	41	590,277	:	7,842	48	609,142
BELG.-LUXBG.	3,253	12	297,738	:	3,986	19	275,105	:	3,443	14	330,513
NETHERLANDS	2,953	21	486,420	:	2,400	16	376,022	:	2,687	18	302,003
DENMARK	1,079	8	228,260	:	938	8	243,382	:	708	9	205,456
IRELAND	381	3	251,449	:	292	4	81,886	:	193	1	52,625
PORTUGAL	479	2	38,112	:	713	2	59,801	:	595	2	45,975
GREECE	296	3	40,325	:	278	2	0	:	245	4	0

HS 6215.10	1989			:	1990			:	1991		
	V	Q	SU		V	Q	SU		V	Q	SU
TOTAL EEC	121,705	847	16,735,415	:	143,338	989	16,718,074	:	162,835	1,046	19,604,668
of which:				:				:			
FR GERMANY	32,544	185	3,575,330	:	41,608	235	4,465,686	:	55,754	349	6,795,397
UNITED KINGDOM	31,433	319	6,418,857	:	28,206	244	5,098,399	:	22,441	204	3,928,040
FRANCE	26,325	175	2,771,937	:	31,320	281	3,139,264	:	31,579	206	3,374,693
NETHERLANDS	7,059	58	1,135,376	:	8,842	62	1,282,739	:	9,773	64	1,255,005
SPAIN	3,521	24	343,743	:	6,921	43	720,011	:	11,465	81	1,228,406
BELG.-LUXBG.	6,314	26	560,453	:	7,573	31	639,756	:	7,920	36	818,048
ITALY	7,143	8	415,620	:	9,143	10	462,476	:	10,763	14	591,422
DENMARK	1,586	7	239,111	:	2,046	10	288,466	:	3,034	24	442,759
PORTUGAL	1,753	8	140,274	:	2,928	14	225,089	:	3,939	19	413,426
GREECE	1,859	14	182,964	:	2,922	31	0	:	3,956	25	395,803
IRELAND	2,168	23	951,750	:	1,829	28	396,188	:	2,211	24	361,669

Appendix bis

Suppliers of silk accessories to the EEC in 1991
(V: ECU '000; SU: no. of pieces)

HS 6213.10	V	SU	:	HS 6214.10	V	SU	:	HS 6215.10	V	SU
W O R L D	5,228	5,695,520	:	W O R L D	98,452	16,234,833	:	W O R L D	162,835	19,604,668
INTRA-EC	3,141	944,210	:	INTRA-EC	58,760	3,698,045	:	INTRA-EC	148,236	16,408,345
EXTRA-EC	2,086	4,751,310	:	EXTRA-EC	39,597	12,532,016	:	EXTRA-EC	14,547	3,190,834
CHINA	1,051	3,504,805	:	CHINA	12,995	7,218,935	:	ITALY	107,360	12,588,211
INDIA	402	907,695	:	INDIA	5,639	3,159,526	:	UK	13,351	1,320,957
ITALY	2,208	690,573	:	ITALY	36,673	2,193,773	:	CHINA	2,198	1,102,414
MAURITIUS	181	104,845	:	JAPAN	7,830	1,053,885	:	FR GERMANY	7,163	797,603
UK	372	93,267	:	FRANCE	15,990	866,764	:	FRANCE	11,958	683,069
KOREA REP.	141	82,067	:	FR GERMANY	2,505	315,979	:	NETHERLANDS	3,950	532,968
HONG KONG	35	76,961	:	KOREA REP.	2,042	244,744	:	KOREA REP.	1,794	373,191
FRANCE	380	71,160	:	HONG KONG	613	204,873	:	THAILAND	1,061	353,972
FR GERMANY	112	57,946	:	UK	2,420	172,189	:	SWITZERLAND	3,952	268,743
JAPAN	115	22,131	:	MAURITIUS	3,507	134,069	:	MAURITIUS	609	240,455
SWITZERLAND	88	20,186	:	SWITZERLAND	3,502	124,125	:	HONG KONG	376	210,509
SPAIN	7	12,114	:	PAKISTAN	176	111,529	:	SPAIN	2,302	187,032
TAIWAN (CHINA)	6	9,000	:	BANGLADESH	196	90,330	:	MOROCCO	1,185	133,290
NETHERLANDS	36	8,317	:	NETHERLANDS	434	67,527	:	BELG.-LUXBG.	1,080	122,197
USA	18	8,242	:	BELG.-LUXBG.	401	45,249	:	INDIA	238	113,699
AUSTRIA	21	6,845	:	THAILAND	256	43,085	:	AUSTRIA	855	101,868
BELG.-LUXBG.	7	6,500	:	AUSTRIA	878	40,066	:	USA	887	101,724
THAILAND	14	3,964	:	MOROCCO	1,000	35,622	:	IRELAND	578	86,361
PORTUGAL	18	3,849	:	USA	682	28,168	:	SWEDEN	544	80,917
SRI LANKA	5	3,000	:	SPAIN	238	18,620	:	PORTUGAL	352	69,076
CANADA	3	1,116	:	DENMARK	47	11,529	:	JAPAN	534	57,556
IRELAND	1	484	:	TAIWAN (CHINA)	33	10,574	:	TAIWAN (CHINA)	42	14,340
YUGOSLAVIA	0	300	:	SWEDEN	29	8,154	:	GREECE	67	13,625
AUSTRALIA	1	153	:	SAUDI ARABIA	6	6,540	:	TUNISIA	48	9,420
			:	PORTUGAL	34	5,298	:	HUNGARY	31	8,504
			:	SOVIET UNION	15	2,166	:	DENMARK	71	7,246
			:	CANADA	8	2,150	:	CANADA	51	4,546
			:	TURKEY	12	2,053	:	SOUTH AFRICA	15	2,992
			:	INDONESIA	33	1,705	:	POLAND	13	1,998
			:	BULGARIA	7	1,500	:	NEW ZEALAND	13	1,895
			:	TUNISIA	24	1,450	:	INDONESIA	2	1,800
			:	NORWAY	19	1,401	:	AUSTRALIA	29	1,687
			:	IRELAND	9	957	:	FINLAND	11	1,119
			:	POLAND	10	912	:	TURKEY	18	1,000
			:	FINLAND	27	808	:	SINGAPORE	9	900
			:	SINGAPORE	13	797	:	NORWAY	8	836
			:	MALAYSIA	15	670	:	BERMUDA	3	400
			:	LEBANON	4	565	:	VENEZUELA	2	400
			:	MEXICO	1	352	:	BRAZIL	5	251
			:	NEW ZEALAND	3	300	:	COSTA RICA	2	132
			:	ISRAEL	4	187	:	CUBA	3	120
			:	GREECE	6	160	:	MALTA	2	109
			:	AUSTRALIA	5	156	:	CANARY ISLANDS	1	47
			:	NEPAL	1	155	:			
			:	HUNGARY	0	125	:			
			:	BRAZIL	2	119	:			
			:	IRAN	1	100	:			
			:				:			

Source: Statistical Office of the European Communities, Luxembourg

Silk clothing accessories - France

Product description	HS 621310	Handkerchiefs of silk or silk waste
	HS 621410	Shawls, scarves, mufflers, mantillas, veils and the like of silk or silk waste
	HS 621510	Ties, bow ties and cravats of silk or silk waste.

V = '000 FF
Q = Stooks

	1989		1990		1991	
	Q	V	Q	V	Q	V
HS 621310						
Imports	144	14,377	92	13,669	53	8,037
of which EEC:	109	11,783	84	12,257	37	6,767
Exports	92	11,342	33	9,968	55	7,199
of which EEC:	35	5,108	14	2,937	39	3,489
HS 621410						
Imports	2,498	475,105	1,670	369,303	1,006	178,479
of which EEC:	1,550	269,784	630	150,199	610	120,419
Exports	2,191	682,470	1,840	566,873	1,109	333,027
of which EEC:	558	135,404	520	126,408	364	95,156

Principal suppliers among developing countries: Mauritius, India, China, Republic of Korea, Morocco.

HS 621510

Imports	1,719	181,765	1,800	205,831	2,041	218,518
of which EEC:	1,465	164,808	1,540	181,482	1,739	196,275
Exports	2,089	406,037	2,070	370,215	1,609	335,098
of which EEC:	414	77,345	480	83,923	505	96,945

Principal suppliers among developing countries: Mauritius, Morocco, Republic of Korea, Thailand.

Source: Ministry of Finances - Direction générale des douanes.

Market characteristics The French market for silk clothing accessories is dominated by Italian goods. Some 10 manufacturers are responsible for generally upmarket domestic production, most of which is exported.

The market for silk ties is traditional in that it tends to be upmarket, with 80% of sales bearing the labels of the great fashion houses. The "unlabelled" market has, however, made great strides over the last few years and offers opportunities for developing countries.

Fashion dictates patterns and colours for ties, which represent the only aspect of individuality in man's clothing - and are therefore subjective. The manufacturer must follow trends in fashion but must also respond to consumer demand. Ranges are revamped every 6 months, with slight changes in between. Currently, the trend in the market is towards prints and away from woven designs. Original prints and colours are in demand.

The silk handkerchief market closely follows trends in the silk tie market, e.g. colours and patterns.

Demand has however been falling continuously over recent years; five ties are sold for each handkerchief.

The market for silk squares and scarves is larger, and changes in fashion less frequent. However, the last three years have seen a significant drop in sales of traditional silk squares. This is mainly because they are out of fashion, but also because of the availability of bottom-of-the-range silk clothing, which has harmed silk's upmarket image. At the moment, the market seems oversupplied and sluggish. Consequently, anyone seeking to enter it must show creativity and originality to meet the demand for new ideas.

Prices

Retail prices for silk ties:

"Unlabelled"	FF	150 -	200
Brand name	FF	350 -	500

Retail prices for silk scarves:

Downmarket	FF	20 -	40
Mid-range	FF	100 -	200
Brand name	FF	500 -	1 200

Retail prices for silk handkerchiefs:

Downmarket	FF	45
Mid-range	FF	69
Brand name	FF	150

Market access

France applies the EEC Common External Tariff. For details, see the EEC Overview.

Distribution channels

There is a well developed distribution network for mid- and upper range articles, consisting of small fashion boutiques and large stores. A British chain of franchised boutiques has appeared on the market; it specializes in silk clothing accessories and has the resources to import large quantities of articles. There are no major wholesalers, and neither do they order in significant quantities.

Downmarket articles, consisting solely of silk squares and scarves, are sold mainly through hypermarkets which import them in large quantities mainly through central buying agencies.

Commercial practices

Payment conditions vary among importers, but most of them accept letters of credit. Long-term trading relations will be helped if importers and suppliers deal with each other in an atmosphere of trust.

Market opportunities

The market for silk clothing accessories has been declining in recent years, especially since 1990. It is a difficult market for top-of-the-range products bearing the big fashion houses' labels.

The rise in "unlabelled" products over the last few years does however present an opportunity for developing countries, provided that they can keep up with changes in fashion, observe short manufacturing and delivery schedules, and supply high-quality goods, especially in terms of colours.

Downmarket products consist largely of scarves for a younger market. There are possible openings for products with original patterns and colours. Silk clothing accessories have three main advantages: a uniform size of article; a wide range of prices; and suitability for gifts for companies or other organizations. There may be some openings for developing countries in this market, but they are made all the more difficult by the very short delivery periods required.

Useful addresses

Association internationale de la soie
(International Silk Association)
34, rue de la Charité
69002 Lyon
Tel: 78 42 10 79
Fax: 78 37 56 72

Centre textile de conjoncture et
d'observation économique
37-39, rue de Neuilly
B.P. 249
92113 Clichy Cédex
Tel: (1) 47 56 30 30
Tlx: 613738

Union itersyndicale textile (UNITEX)
55, montée des Choulans
69323 Lyon Cédex
Tel: 78 42 29 53
Fax: 78 42 73 80

Trade fairs

Salon international de l'habillement
masculin
(Men's Wear International Exhibition)
8, rue Richelieu
75001 Paris
Tel: (1) 42 96 15 25

Salon international du prêt-à-porter
féminin et salon boutique
(International Trade Fair of "Prêt-à-
Porter" and "Boutique")
5, rue Caumartin
75009 Paris
Tel: (1) 42 68 08 40

List of importers (this list is not exhaustive)

Andrea Pfister
4, rue Cambon
75001 Paris
Tel: (1) 42 96 55 28

Azedine Alaia Sarl
7, rue de Moussy
75004 Paris
Tel: (1) 40 27 85 58
Fax: (1) 48 87 04 36

Avigdor Textiles
21, rue des Capucins
B.P. 1171
69201 Lyon Cédex 01
Tel: 78 28 19 29
Fax: 78 30 05 61
Tlx: 301246

Bentley Cravates bonet
90, rue du Faubourg Saint Honoré
75008 Paris
Tel: (1) 42 65 56 27
Fax: (1) 40 17 00 90

C&R Richard Forman
2, chemin des Fourches
93380 Pierrefitte sur Seine
Tel: (1) 42 35 47 03
Fax: (1) 42 35 47 15

Cattiart Paris
16, avenue de l'Opéra
75001 Paris
Tel: (1) 42 96 00 52
Tlx: 2155549

D'Avor Patrick
32, rue du Sentier
75002 Paris
Tel: (1) 45 08 95 92
Tlx: 210520

Diderot Tissage
9, passage Etienne Delaunay
75011 Paris
Tel: (1) 43 71 82 94
Tlx: 214796

Diffusion de solde
3, bd de Charonne
75011 Paris
Tel: (1) 43 73 04 04
Fax: (1) 43 73 50 18
Tlx: 214101

Eluz
79, avenue du Général de Gaulle
93110 Rosny-sous-bois
Tel: (1) 45 28 05 80
Tlx: 235229

Guard Jamicry
35, rue René Leynaud
69001 Lyon
Tel: 78 28 32 44
Fax: 78 29 53 06

Hamberger
11, rue de la Jussienne
75002 Paris
Tel: (1) 42 36 53 55
Fax: (1) 45 08 07 97

Hélène Dale
7, rue du Scribe
75009 Paris
Tel: (1) 42 60 59 16

Jean Bernard
7-9, rue Commines
75003 Paris
Tel: (1) 48 87 21 47
Fax: (1) 48 87 03 12

Kastouri
22, rue du Disque
Centre commercial olympiades
75645 Paris Cédex 13
Tel: (1) 45 83 36 20
Txl: 203531

Lapresle SA
77, rue de Sèze
69006 Lyon
Tel: 78 52 41 38
Fax: 78 52 69 35

Loewe International
134, bd Haussmann
75008 Paris
Tel: (1) 40 90 32 00
Fax: (1) 42 25 86 94

Malfroy et Millon
153, route de Vourles
69564 Saint Genis Laval
Tel: 72 39 33 66
Fax: 72 39 90 22
Tlx: 370606

Nissim
11, rue Robert Blache
75010 Paris
Tel: (1) 46 07 29 76
Fax: (1) 46 07 22 99

Passport
3400, rue Molinier
47000 Agen
Tel: 53 66 88 50
Fax: 53 66 19 57

Sources of information

- Official Journal of the European Communities
- Trade Information System (TRAINS) - UNCTAD, ITC.
- Direction générale des douanes - France
- Contacts with importers

ITC/MBDBS - October 1992

This brief has not been formally edited by ITC.

Silk clothing accessories - Switzerland

Product	HS 621310	Handkerchiefs of silk or silk waste
description	HS 621410	Shawls, scarves, mufflers, mantillas, veils and the like of silk or silk waste
	HS 621510	Ties, bow ties and cravats of silk or silk waste.

Q = kg
V = SF '000

	1989		1990		1991	
	Q	V	Q	V	Q	V
HS 6213.10						
Imports	2,669	1,003	2,391	878	1,618	497
Exports	1,401	672	1,124	632	816	356

Principal suppliers (percentage of imports value in 1991)

Italy 56, France 23, China 10, Germany 7, other countries 4.

HS 6214.10

Imports	41,462	20,844	54,505	26,714	48,400	20,874
Exports	9,401	4,818	12,043	7,186	14,944	10,320

Principal suppliers (percentage of imports value in 1991)

Italy 29, France 27, Germany 20, Japan 11, China 4, Hong Kong 3, India 2, Austria 2, Republic of Korea 1.

HS 6215.10

Imports	51,645	18,745	62,488	22,530	67,925	24,228
Exports	13,535	6,734	18,664	9,475	18,800	10,165

Principal suppliers (percentage of imports value in 1991)

Italy 63, Germany 20, France 11, United Kingdom 2, Spain 1, Belgium/Luxembourg 1; other countries include Austria, Thailand, China, Hong Kong, Japan, United States and Turkey.

Total:

Imports	95,776	40,593	119,384	50,123	117,943	45,600
Exports	24,337	12,225	31,831	17,294	33,560	20,842

Market characteristics

Switzerland produces silk clothing accessories using imported materials. These high quality products are sold to a very demanding domestic and overseas clientele. Swiss imports of silk clothing accessories within this market segment amounted to SF 45.6 million in 1991, despite the steep fall - 40% - in imports of handkerchiefs between 1989 and 1991.

The share of silk in total imports of clothing accessories is as follows: ties 83% (in 1989 and 1991); shawls and scarves 45% (in 1989) and over 51% (in 1991); handkerchiefs 18% (in 1989) down to 13% (in 1991).

Imports of clothing accessories from other materials amounted to SF 28.2 million.

Among accessories made of silk for the men's market, there is an overwhelming preference for silk ties with fashionable colours and styles. Silk pocket handkerchiefs are next, followed by cravats, and gavroches (small scarves).

The biggest selling items for women are silk scarves and shawls, 90 x 90 cm, known as crêpe de Chine. Mufflers, mantillas, veils and similar articles account for a negligible part of the market only.

Market access

Swiss customs duties for imported silk articles are as follows:

		Rate	
	Normal		EFTA/EEC
6213.10	SF 800/100 kg		exempt
6214.10	SF 885/100 kg		exempt
6215.10	SF 1,120/100 kg		exempt

Preferential exemption from duties for goods from least developed countries is given if the importer makes the request at the time of import, if he supplies documentary proof that the goods were transported directly from the beneficiary country to Switzerland, and if the origin of the goods is supported by a valid certificate of origin, i.e., a GSP Certificate of Origin Form.

Prices

Prices for silk articles vary depending on the quality of the goods and the label put on them.

Retail prices range from SF 20 to SF 60 for silk ties at the bottom and middle of the market, and from SF 60 to SF 150 for ties bearing an upmarket label.

Pocket handkerchiefs range from SF 10 to SF 60 depending on the quality and label.

Silk scarves are priced between SF 10 and SF 30 at the lower end of the market, but can exceed SF 250 for upmarket articles.

Distribution channels Wholesalers and retailers import direct as well as via an intermediary, usually a specialized agent.

The leading retail outlets are the major stores, specialized clothing boutiques and, to a lesser extent, mail-order companies.

Fashion boutiques usually sell high quality articles imported in small amounts, while the major stores sell the whole range of products, imported in large amounts.

Commercial practices As a rule, silk articles imported from Europe are paid for by cheque within 30 days. Letter of credit is generally used for imports from distant countries.

Manufacturers of silk fabric and accessories in Switzerland and Europe can make deliveries extremely quickly, usually within a few days. Goods coming from elsewhere usually operate on a 2 to 4 week delivery schedule.

Market opportunities The market for silk articles remains traditional in Switzerland with a bias towards upmarket products, despite a trend similar to that in the United States of America, where the image and price of silk have fallen over the last few years and are now available to all income levels.

In addition, the market for "unlabelled" products has grown quickly over the last few years and could offer worthwhile opportunities for developing countries, which must, however, follow changes in fashion closely and offer competitively priced and attractive products.

**List of importers
(this list is not exhaustive)**

Alba Porrentury SA
Postfach 1005
Reb-Gässli 4B
3605 Thun
Tel: (033) 22 69 43
Fax: (033) 23 32 97

Belmo AG
Sonnenwiesenstrasse 21
8280 Kreuzlingen
Tel: (072) 74 34 74
Fax: (072) 75 64 94
Tlx: 882 167 strk ch

La Commerciale SA
Case postale 3192
12, rue Etraz
1003 Lausanne
Tel: (021) 20 76 55
Fax: (021) 20 89 57
Tlx: 450 738 cora ch

Dismapharm AG
Wasermattstrasse 3
4104 Oberwil BL
Tel: (061) 401 52 50
Fax: (061) 401 52 51

Guttman Fashion AG
Netzilbodenstrasse
4133 Pratteln
Tlx: 963 326 gutt ch
Tel: (061) 811 45 50
Fax: (061) 811 45 80

Schoop & Co.
Sägereistrasse 21
8152 Glattbrugg
Tel: (01) 810 30 34
Fax: (01) 810 30 33

List of major retailers

ABM (Au Bon Marché)
Giesshübelstrasse 4
8045 Zürich
Tel: (01) 288 81 11
Tlx: 815 444
Fax: (01) 201 15 21

Beldona SA
Im Langackerstrasse 16
5405 Baden
Tel: (056) 84 01 21
Tlx: 56 828
Fax: (056) 83 41 10

C & A
6-8, rue de la Croix-d'Or
1211 Geneva 3
Tel: (022) 21 66 66
Tlx: 27 692

La Commerciale SA
Case postale 3192
12, rue Etraz
1003 Lausanne
Tel: (021) 20 76 55
Tlx: 450 738 cora ch
Fax: (021) 20 89 57

EPA-UNIP
Neue Warenhaus SA EPA
Bederstrasse 49
8027 Zürich
Tel: (01) 201 66 11
Tlx: 52 312
Fax: (01) 201 41 86

Jelmoli
Jelmoli Holding SA
Seidengasse 1
8001 Zürich
Tel: (01) 220 40 11
Fax: (01) 211 04 65

Au Grand Passage SA
50, Rue du Rhône
1204 Geneva
Tel: (022) 320 66 11
Tlx: 422 770
Fax: (022) 320 42 91

Placette Grands Magasins
Nordmann & Cie
6, rue Cornavin
1201 Geneva 1
Tel: (022) 731 74 00
Fax: (022) 738 75 38

Mail-order firms

Vedia-Burberrys (Suisse) SA
14, chemin de la Voie-Creuse
1211 Geneva 2
Tel: (022) 734 60 41
Tlx: 412 124
Fax: (022) 734 87 75

Charles Veillon SA
Route de Crissier
1030 Bussigny-Lausanne
Tel: (021) 702 29 11
Tlx: 459 521
Fax: (021) 702 29 81

Useful addresses

Association suisse des détaillants
en textile
(Swiss Textile Retailers Association)
43, rue du Rhône
1204 Geneva
Tel: (022) 321 93 33
Tlx: 421171 etav ch

Association suisse de l'industrie
de l'habillement
(Swiss Clothing Industry Association)
Gotthardstrasse 61
8027 Zürich
Tel: (01) 202 71 61
Tlx: 817166 gsbi
Fax: (01) 202 06 51

Trade fair

SERATEX
Swiss Professional Fashion Fair
(twice a year)
C.P. 223
1000 Lausanne 22
Tel: (021) 643 21 11
Fax: (021) 643 37 11

Sources of information

- Swiss Foreign Trade Statistics - Direction générale des douanes, Bern, 1989, 1990, 1991.
- International Textile Magazine.
- Textile Asia Magazine.
- Marja Kurki, "Conseils aux nouveaux exportateurs d'articles de soie", International Trade Forum, July-September 1990, pp. 10-15.
- Beatriz Mallory, "Soie: perspectives de ventes par catégorie d'articles", International Trade Forum, January-March 1991, pp. 6-10.
- Trade contacts.

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