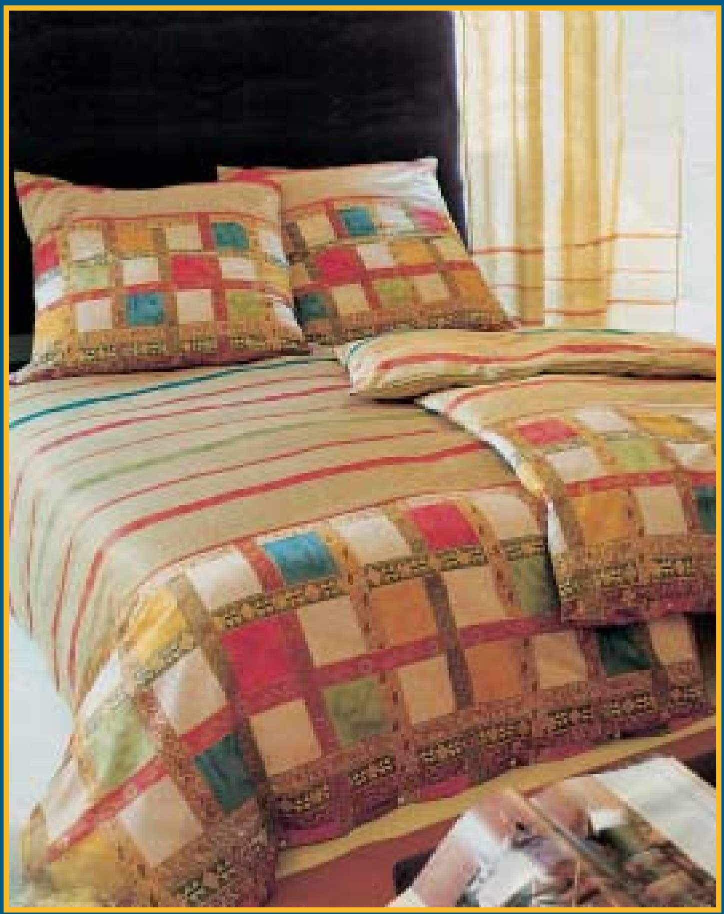
EU MARKET SURVEY 2002

HOUSEHOLD, FURNISHING AND FLOOR-COVERING TEXTILES



CENTRE FOR THE PROMOTION OF IMPORTS FROM DEVELOPING COUNTRIES

EU MARKET SURVEY 2002

HOUSEHOLD, FURNISHING AND FLOOR-COVERING TEXTILES

Compiled for CBI by:

Drs. Jan P. Servaas

November 2002

Updated version of CBI’s Market surveys ‘Household and furnishing textiles’ published in October 1999 and ‘Carpets and textile floor coverings’ April 1998.

Photo courtesy:

Collection Bassetti

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REPORT SUMMARY

Introduction
This survey profiles the market for household, furnishing and floor-covering textiles in the European Union (EU) and is an updated and extended version of the former CBI surveys 'Carpets and textile floor coverings', published in April 1998 and 'Household and furnishing textiles' published in October 1999.
The emphasis of the survey lies on those products, which are of importance to developing country suppliers. The major national markets within the EU for those products are highlighted. The survey includes contact details of importers, trade associations and other relevant organizations. Furthermore, statistical market information on consumption, production and trade, and information on trade structure and prices and margins is provided.
As an exporter, you need this information to formulate your own market and product strategies. In order to assist you with this, CBI has also developed a matching EU Strategic Marketing Guide for Household, furnishing and floor-covering textiles. It offers a practical handbook for exporters engaged, or wishing to engage, in exporting household, furnishing and floor-covering textiles to the EU. It aims to facilitate exporters in formulating their own market and product strategies through the provision of practical information and a methodology of analysis and ready-to-fill-in frameworks.
As mentioned above, statistical market information on consumption, production and trade, and information on trade structure and prices and margins, which is required for the ready-to-fill-in frameworks, can be found in this EU Market Survey.

Market research
This EU Market Survey and the EU Strategic Marketing Guide serve as a basis for further market research: after you have read this survey and filled in the frameworks in the strategic marketing guide it is important to further research your target markets, sales channels and potential customers.
Market research depends on secondary data (data that have been compiled and published earlier) and primary data (information that you collect yourself).
An example of secondary data is this EU Market Survey. Primary data are needed when secondary data fall short of your needs, for example when researching your specific type of consumer about the acceptance of your specific product. Sources of information are among others (statistical) databanks, newspapers and magazines, market reports, (annual) reports from branch associations, but also shops in target countries, products or catalogues from your competitors, and conversations with suppliers, specialists, colleagues and even competitors. After you received/collected your information you should analyse it. In order to judge the attractiveness of the market, sales channel or customer, you should use/develop a classification or score system. For more detailed information on market research, reference is made to CBI's Export Planner (2000). Together with other CBI publications, like the 'Packaging Manual' and the 'Environmental Quick Scan Textiles', a fairly complete overview is given to manufacturers/exporters in developing countries, who wish to sell to the EU market. Some of these sources of information are also available on the CBI web site. At the outset, a word of caution must be said. Data on textile end products are notoriously difficult to obtain, particularly those relating to production.

Survey
The following classification is used for the products discussed in the survey:
- **household textile** products, include bath linen (towels, washing gloves etc.); bed textiles (blankets, (cover-) sheets and pillowcases, bedspreads, quilt covers etc.); table linen (tablecloths, napkins etc.) and kitchen linen (tea towels).
- **furnishing textiles,** include textiles, which are used for window covering (curtains and draperies); wall and ceiling coverings; upholstery and other (like throw rugs etc.).
- **carpets and other textile floor coverings** include knotted rugs or carpets (Nepalese hand-knotted carpets, Gabbeh design carpets, dhurries, Persian carpets and Berber rugs); woven carpets (hand-woven kelim or kilim rugs, sumacs, dhurries etc.), woven piles, flat woven rugs and rugs in natural fibres; tufted tiles and carpets; felt tiles and carpets etc.

Although reference will be made to the contract sector (hotels, offices, hotels, public buildings, sport and holiday accommodation etc.) the main focus of this survey is on the residential market for carpets and floor rugs, i.e. floor coverings sold through the retail trade. Both markets have their own market structure and market characteristics and differ considerably in size.

Consumption
Unlike many other items of consumer expenditure, the overall market for household, furnishing and floor-covering textiles in the EU is relatively stable and amounted to € 30 billion in 2001.
The EU consumer market for household and furnishing textiles amounted to € 20.5 billion in 2001 and showed a very small growth in the period under review.
Germany is still the largest market, followed at a shrinking distance by the UK. Other important markets in the EU are France, Italy and Spain. The Netherlands ranked 6th before Belgium and Sweden.

Five countries (Germany, UK, France, Italy and Spain) account for almost 80 percent of EU consumption. The EU consumer market for carpets and other floor coverings grew 2 percent in 2000 and fell slightly to € 9.5 billion in 2001. Germany is still the largest market, followed by UK. Other important markets in the EU are France, Italy and Spain. The Netherlands ranked 7th after Belgium and before Sweden. Four countries (Germany, UK, France, Italy and Spain) account for almost 70 percent of EU consumption. In many EU countries, demand for textile floor coverings has suffered from a gradual, long-term shift towards other types of products, including wood, ceramic, cork and laminated floor coverings.

In particular, wood and the much cheaper laminates increased in popularity in the last decade. The fall in broadloom carpets is partly compensated by increased sales in floor rugs. Total expenditure on household and furnishing textiles in the contract sector amounted to € 6.6 billion and on carpets € 3.2 million, each about a third of consumer expenditure. Expectations for expenditure on household, furnishing textiles and to a lesser degree for broadloom carpets (due to the popularity of other materials for floor covering) for 2003 are optimistic, for the following reasons:

- demographic developments like an increasing tendency for young people to set up their own households independently of the parental home; rising divorce rates and rising numbers of single-parent families leads to an increase in the number of households;
- an increasing proportion of elderly households and older people tend to spend more on their homes;
- the housing stock in total is rising;
- increased attention in the last decade by (home) magazines and television for interiors led to more fashionable products in the household and furnishing sector;
- developments in the retail sector, like a wide availability of household textiles at competitive prices and a growing concentration at retail level;
- increased cheap imports from other EU countries and from low-cost countries.

Production

The EU has a major carpet manufacturing industry which produced 1.1 billion square metres in 2001. The principal products are tufted and needlefelt carpets. Carpet production is fairly concentrated in a small number of member states, of which Belgium is the most important. Belgium accounted for about 45 percent of total EU production in 2001 and carpet production (in volume) can be divided into 18 percent woven, 56 percent tufted and 25 percent needlefelt.

The volume of carpet production among many of the EU manufacturers has decreased in recent years. EU production of household and furnishing textiles showed a much smaller decrease to 666,000 tons in 2001, of which furnishings accounted for 33 percent.

Imports

Total EU imports of household, furnishing and floor-covering textiles amounted to € 8.8 billion in 2001. Germany remained the leading importer, with an import share of 27 percent in terms of value, followed by the UK (23%), France (13%), Belgium and The Netherlands (each country 6%). The import share of the UK rose from almost 19 percent in 1999 to 23 percent in 2001, caused by an intense competition at the retail level and the position of the national currency (pound sterling). The difference between imports by Germany and the UK became much smaller. EU imports of household, furnishing and floor-covering textiles increased by 8.8 percent in the period 1999-2001, of which 8.5 percent in the period 1999-2000. Developments in imports of household, furnishing and floor-covering textiles vary strongly per EU country. This depends on several factors like size and structure of domestic production, the possibilities and size of re-exports and developments in demand. Developments in imports in EU countries during 1999-2001 can be divided (in value and on annual average) into: strongly falling imports in Greece, Portugal and The Netherlands; slowly falling imports in Germany; slowly growing imports (less than EU average) in Belgium, Italy and France; fast growing imports in Austria, Finland and Denmark and booming imports in Ireland, Sweden, Spain and the UK. Imports in textile floor coverings can be divided into tufted, woven piles and needlefelt sectors with a dominating role for European countries (particularly Belgium) and knotted, hand-woven and flat woven sectors with a dominating role for developing countries, like India, China, Pakistan etc.

With regard to factors like cost levels and distances, the following competitive categories in household and furnishing textiles can be distinguished:

- Low-cost, long-distance countries: this category of countries specialises in low-priced, high-volume, fashionable and standard types of products of a fair quality. These products are mainly made to buyers' specifications in countries in South-East Asia (Pakistan, India and Bangladesh), the Far East (China), Northern Africa (Egypt) and Southern America (Brazil and Colombia).
- Medium-cost, medium-distance countries: these countries supply medium-fashionable products. It concerns Turkey, Portugal and East-European countries, like Poland, Czech Republic, Romania, Bulgaria and Estonia.

- High-cost countries: these countries supply quality fashion characterised by frequent deliveries, small quantities and sophisticated fabrics, which are difficult to obtain in low-cost countries. Western Europe (Germany, Belgium, France, Italy and The Netherlands), the USA and Israel belong to this category.

The role of developing countries in EU imports of household, furnishing and floor-covering textiles increased considerably and rose from € 3.0 billion in 1999 to 3.5 billion in 2001. Imports from countries outside the EU became more important than intra-EU trade since 2000. The import share of developing countries in total EU imports rose from 37 percent in 1999 to 40 percent in 2000.

Developing countries play a dominant role in product groups like knotted and hand-woven floor coverings, while in imports of felt and tufted floor coverings this role is negligible. The import share of developing countries in the sector household textile and furnishings grew to 51 percent in 2001.

In terms of value imports from developing countries in Asia grew 14 percent in the period under review to € 2.5 billion. Imports from developing countries in the Mediterranean grew 26 percent to € 0.9 billion and from developing countries in Central and Eastern Europe 11 percent to € 62 million, while imports from Central and South American countries decreased from € 86 million in 1999 to € 80 million in 2001. EU imports from ACP countries showed a small growth, but remained rather limited at less than € 4 million in 2001.

Exports
The leading EU exporter remained Belgium accounting for almost 34 percent of total EU exports, followed by Portugal, Germany, The Netherlands and France. The most important destination outside the EU was the USA with 10 percent of total EU exports, followed by Switzerland. Other destinations were Poland, Japan, Norway, Russia, Czech Republic and Saudi Arabia. Exports to all destinations mentioned increased, except exports to Japan and Norway.

Distribution
In many European countries, the distribution of household and furnishing textiles has been dominated by a small number of retail organizations. On the one side operating from interior department stores (Ikea), on the other side from more generally oriented department and variety stores (Marks & Spencer, Hema) or hypermarkets (Hypermarchés).
This also means an decreasing market share for branded labels in favour of private labels .
Most of the major retail organizations set up their own buying organizations or production units in low-labour-cost countries. This means that retailers are able to bypass the domestic manufacturers.
Distribution channels for household textiles differ greatly across the EU member states.
The UK has a high concentration of distribution indicated by the relatively low share of independent retailers. The southern member states Portugal, Italy, Spain and Greece, however, have high market shares (between 40-60 percent) for independent retailers. These retailers buy mainly from manufacturers and wholesalers/importers, contrary for instance to Germany and The Netherlands, where many independent retailers are members of buying corporations. Large retailers' groups hold the biggest share of the market in the northern member states.
The typical channels of distribution for fitted carpets and for loose floor rugs in many EU countries are not the same. A fitted carpet is mainly of Belgian, Netherlands or other EU manufacture and individual stores buy requirements directly from the factories. Wholesalers do not play an important role in the distribution of major brands. However, most wholesalers and the buying combinations have developed their own successful private label brands. Many companies use different labels to denote a specific style or theme, which incorporates not only carpets, but also curtain materials, upholstery fabrics, net curtains and accessories like cushions and other drapes.
The objective is to sell a whole range of products which together combine into a complete interior look.
The importer/wholesaler does play a very important role in the distribution of loose floor rugs.
Specialist companies handle only floor rugs and some specialise only in import from countries like India, Nepal, China, Turkey etc. These importers are constantly looking for new products and sources.
Retailers, except very large multiples like Ikea and Carpetland, rarely import rugs directly from sources outside Europe. They prefer to buy through importers and/or agents who are in a better position to monitor the quality and reliability of production and delivery, and who have on-going direct contact with the producers to advise them on changing demands in terms of fashion designs, qualities and colours.
The role of specialized retailer remains rather important and accounts for almost three quarters of total retail sales.

Opportunities for developing countries
Expectations for expenditure on household textiles, furnishings and floor rugs and, to a lesser degree for broadloom carpets for 2003 are optimistic.
Developments in the retail sector like a wide availability of household textiles at competitive prices and a growing concentration at retail level lead to an increased demand for fashionable products against

low prices, while developments in EU production lead to a further source of basic products in low-cost countries and probably of products with a higher design content. The decline of domestic manufacturing led to a more internationally oriented trade in textiles.

The keen competition on the EU market will steadily increase and this leads to further possibilities for exporters from low-cost countries.

The role of importer/wholesaler will remain stable, while the role of multiples and, to a lesser degree, buying groups or franchise formula will slightly increase in the coming years.

For starting exporters, the importer/wholesaler route is generally the safest and most effective first approach. Importers who buy for their own account can be a very effective means to gain distribution.

Exporters of household, furnishing and floor-covering textiles are confronted with many aspects like quality, sizing, packaging, environmental issues, resulting in a lot of technical requirements, added to which are aspects of design, fashionability, market developments etc. For that reason, co-operation in a variety of forms between importer and exporter can be necessary of which the more far-reaching forms of potential co-operation are joint ventures and co-makership agreements. Some experts are of the opinion that instead of concentrating on increasing volumes, developing countries should shift production profiles to higher-value products. Another point of view, however, suggests to specialise based on experience and to try to obtain a higher degree of efficiency in production. Anyway, companies in developing countries, which are continually adapting new technologies and have the advantage of low production costs, definitely have advantages.

1 PRODUCT CHARACTERISTICS

1.1 Product groups household, furnishing and floor-covering textiles

Large quantities, and a huge variety, of textiles are used in an interior environment (homes, offices, hotels, etc.). Definitions of these textiles vary from country to country. For example, in Germany and The Netherlands a distinction is made between house textiles and home textiles. In that case, products like filling materials used in duvets, quilts, pillows, sleeping bags and mattresses are included in the category house textiles.
However, these products are not discussed in this survey. The following classification is used in this survey:
Household textile products, includes:
- bath products or bath linen: towels, bath rugs, bath mats, washing gloves, etc. (1.1.1)
- bedding products or bed linen: blankets, (cover-) sheets and pillowcases, bedspreads, quilt covers etc. (1.1.2)
- t• able-top products or table linen: tablecloths, napkins etc. (1.1.3)
- kitchen products or kitchen linen: tea towels (1.1.4)
- other (cleaning products like rags, mops etc.)

Furnishing textiles, includes textiles, which are used for:
- window covering: curtains and draperies (1.1.5)
- wall and ceiling coverings (1.1.6)
- upholstery (1.1.7)
- other (like decorative pillows, throw rugs etc.)

Carpets and other textile floor coverings can be defined by method of manufacture and include:
- knotted rugs or carpets, including Nepalese hand-knotted carpets, Gabbeh design carpets (besides hand-knotted also in tufted and woven versions, like dhurries, Persian carpets and Berber rugs. (1.1.8)
- woven carpets, including hand-woven (kelim or kilim rugs, sumacs, dhurries etc.), woven piles, flat woven rugs and rugs in natural fibres (1.1.9)
- tufted tiles and carpets (1.1.10)
- felt tiles and carpets (1.1.11)
- other carpets

It should be noted that several classifications are possible. There is some overlap in the classification used above, because some fabrics may be found in more than one classification. The word "linen" is often used for household textile products because many of these products were originally made from flax (linen) fibres.
In this survey household textiles include among others bed linen, blankets and bedspreads, while bedspreads in several statistics are classified under furnishings.
Floor coverings can also be defined by fibre content: the pile of carpets is composed of natural yarns (vegetable, like cotton, jute, sisal, coir, flax, reed etc. or animal origin nature, like wool and hair), synthetic yarns (like nylon or other polyamides, acrylic, polyester and polypropylene) or blends.
In consumer terms, the most straightforward distinction is that between fitted or wall-to-wall carpets, loose floor rugs and tiles (< 0.3 m^2).

Although reference will be made to the contract sector (household textiles, furnishings and textile floor coverings for hotels, offices carpet for offices, hotels, public buildings, sport and holiday accommodation etc.) the main focus of this survey is on the domestic market for carpets and floor rugs, that is floor coverings sold through the retail trade.

1.1.1 Bathroom products

The major textile bathroom product is a (terry) towel: hand towels, bath and beach towels, and guest towels. The most important differences are based on end-use, which dictates the different sizes. Other bath products are washing gloves, bath rugs and bath mats.
Towels are mainly made of terry cloth (non-cut loops). Terry is absorbent, has a light massage effect, is strong, durable and easy to wash. In recent years, the quantity of high-quality terry material in the market has constantly increased. The trend is in the direction of more and heavier, voluminous and softer qualities.
Bath towels and also towels for other purposes are made of cotton. New developments include blends of cotton with other fibres to obtain softer feeling, faster drying and more brilliance.

1.1.2 Bedroom linen

In terms of value, this is certainly the most important market for household textiles. In this report we distinguish the following product groups: bed linen (sheets, fitted sheets, pillow cases, quilt covers), blankets (excluding electric blankets) and bedspreads.
Functions of bed linen are to protect the bedding, to enhance "sleeping pleasure" and an aesthetic appeal.
The most important development concerning bedroom linen in the last two/three decades has been the introduction of the eiderdown also referred to as duvet, or quilt (together with the quilt cover).
In North-European countries including The Netherlands, most people sleep under a duvet/quilt. It should be understood that the quilt cover has much more potential for fashion expression than sheets. An exporter wishing to compete in this category must also be prepared to compete in fashion terms. A minority of the EU population (mainly in the south of Europe) sleeps under blankets, using traditional sheets and bedspreads.
While many houses have central heating capability, including the bedrooms, the temperatures maintained in them are essentially ambient and bed linen must have excellent insulation properties.

Cotton fabric is mainly preferred for all types of categories of bed linen; to a much lesser degree polyester-cotton, primarily due to its shrink resistance and durable qualities. Other textile fabrics such as silk account for a minor percentage of the total market.

1.1.3 Table linen

Belonging to the group of table linen are: tablecloths, table-covers, table-centres, table-runners and napkins. The tablecloth has two functions: protection of the table and decoration (aesthetic appeal).
The market is not at all large. It is difficult to get hold of proper figures on table napkins separately, as they are almost always sold in a set matching the tablecloth, particularly in the case of expensive quality.
White, with or without self-print, and single coloured plain, with or without self-print are most commonly used. Table linen is more affected by fashion trends than bed linen. It is important for exporters to follow changes in taste, colour, material and texture.
There is a definite decline in the daily use of the textile tablecloth, but an increase in attractive kitchen items, such as dish towels, terry towels, warmers, place mats etc. Very often, the textile napkin is being replaced by a cellulose one, increasing the possibility of colour variations in combination with the tablecloth, the table top and/or the candles, and decreasing the laundry chore.
There is an enormous offer as to types, sizes, forms, materials, colours and designs. Materials can be flat, structured, printed, dobby, jacquard, embroidered, damask with all kinds of adornments and decorations.
Table linen is mostly made of cotton. Material other than cotton not containing flax or ramie, depicts a demand for high quality textile fibres such as silk, or easy-to-clean such as polyester. The market share of pure cotton has so far remained sufficiently stable.

1.1.4 Kitchen products

A decrease in the use of tea towels has been greatly influenced by the fact that increasingly more households are using automatic dishwashers, so that hand-drying is no longer necessary.
In the kitchen, two types of towels are used:

- kitchen towels, made of terry or flat woven;
- dish towels or tea towels, only flat woven.

Dish or tea towel are made of cotton. Check patterns are still most popular for tea towels.

1.1.5 Window coverings

Textiles for window covering can be divided into the following categories: net or lace curtains, curtains and draperies.
The function of window covering is various: provide privacy, eliminate (sun-) light, insulation purposes (thermal, acoustic), aesthetic effects etc.
The more open the fabric construction, like net or lace curtains, the greater the visibility of outside view and light penetration, but there is less privacy. In this case, the decorative function has the highest priority.
Net curtains adorn the window frame in many houses. The major fibre used for net curtains is polyester filament. Other fibres are polyester staple and acrylic staple.
Curtains are relatively sheer and lightweight and are in most cases hung without linings, while draperies are heavy, often opaque, and usually have a lining.
Curtains are largely sold ready-made in lengths which fit the standard window sizes and some heights.

However, buying curtain fabrics to sew one's own curtains or letting an interior decoration firm make them up is not uncommon – usually this applies to expensive materials (e.g. for offices).
Curtains and draperies are made from all types of fibres and fabric constructions, however, most curtains are made of synthetic fabrics. This is because cotton curtains require ironing after washing and they are heavy and thus inconvenient in handling.
There is also a market for expensive fibres such as silks, but it is fairly limited because of pricing and handling restrictions. The choice of curtains depends on the fashion in wallpapers and paints.

1.1.6 Wall and ceiling coverings

Fabrics placed on wall and ceilings can be visually interesting as well as functional. Such fabrics reduce and absorb noise in a room. Wall and ceiling coverings are mainly used in the commercial or contract interior industry. Usage in the residential sector is very limited, because consumers prefer wallpapers, plaster work or other non-textile applications. Soft floor coverings are also used as ceiling coverings.

1.1.7 Upholstery

Fabrics for upholstery often have the same name as clothing fabrics, however, there are many differences. Upholstery fabrics are heavier (more ends and picks per cm), better dyed (colour fastness) and may have a special finish (flame- and stain-resistant).
Requirements are higher in the case of usage in the contract sector (public buildings, public traffic, hotels, offices etc.), also based on safety aspects.
Fabrics for upholstery are stretched tautly over furniture frames and this requires more durable fabrics.
Upholstery fabrics are also used for cushions.
The major upholstery fabrics used are made of cellulosic type fibres and cotton, like (heavy) corduroy, velour, velvet, damask etc.

1.1.8 Hand-knotted rugs

In the manufacture of oriental rugs, the lacing or tying of a yarn is introduced into the base fabric around the warp yarns. Two major types of knots used for this purpose are the ghordes and the senna knot.
The rugs are mainly made of wool and/or silk.

A measure of oriental carpet quality is the knots per square meter (or inch). In wool carpets the main sector of demand consists of the quality 350-500 rows of knots per square metre of warp. Other respectively cheaper and more expensive qualities are less than 350 knots per m^2 and more than 500 knots per m^2.
The main types of hand-knotted carpets of interest to EU consumers are:
- Nepalese hand-knotted carpets in modem and traditional designs;
- Gabbeh design carpets, originating in Iran with individual designs and decorative geometric borders, featuring primitive daily life and animals and folklore. Gabbeh designs are popular at three different levels of the market; hand-knotted carpets, tufted versions and dhurry, woven versions;
- Authentic Persian carpets have a small market in the EU;
- Berber rugs, traditionally from North Africa. Although demand for Berbers is no longer large, there is growing demand for these carpets in modern fashionable colours to highlight interiors with hard floors, but the popularity of more classic Berber shades is small.

1.1.9 Woven rugs
Handwoven dhurries and similar flat woven rugs have enjoyed a long period of popularity. Dhurries are sold in cotton and wool with fringes at the ends.
These flat woven rugs feature simple designs and, for the Dutch market, it is very important that colours and designs are adapted over time to meet the most recent fashion and interior trends. Flat woven kelims have been very popular as a relatively cheap, colourful and decorative article for floors and walls.

Since around 1990 the theme 'back to nature' has had a dominant influence on trends in furniture and furnishings. There is strong demand for carpet and rugs in coir, sisal, reed, jute and other natural fibres. Natural-looking textures, colours and designs are important.

Rugs in these materials, with borders in colours to coordinate with other interior furnishings, are extremely popular. Borders are available in a wide range of different fabrics colours and patterns. Jute, cotton, leather, imitation leather and decorative upholstery fabrics are all offered as borders. Local carpet companies (importers and manufacturers) specialise in customising rugs for individual customers, especially at the upper end of the market. At the medium to lower end of the market, there has been strong demand for imports both of broadloom carpet in natural fibres and finished rugs and mats. Oversupply of cheap poor quality carpets have had a negative influence on this market sector, and demand has shifted more towards Gabbeh and other designs.

1.1.10 Tufted carpets and rugs
This construction method is used to make 67 percent of the carpet fabric produced in the EU. Yarns carried by many hollow needles are punched through a woven or non-woven backing material to form rows of tufts.
Pile may be cut or uncut, high or low. Quality depends on fibre used, tuft density, and size and twist of the pile yarns.
Classic designs account for an increasingly smaller proportion of the market and the main demand is for rugs which provide decorative interest and comfort, to contrast with the plain simplicity of interiors with hard flooring. At the middle to upper level of the market there is demand for quite timeless designs in small series which can be changed quickly to incorporate modern accents, such as different fashionable colours, border designs and motifs.
At the cheaper end of the market there are large sales of rugs from India and China in wool, acrylic and polypropylene. Important designs include large plain centres with border designs, imitation Gabbeh designs, all-over printed patterns, classic Chinese patterns with central medallions and floral and Chinese character motiefs. Another competitive product at the lower end of the market is simple pieces of broadloom carpet cut to size and finished by whipping or seaming, which is a service offered by a number of local carpet factories.

1.1.11 Felt tiles and carpets
Needlefelt or punched felt is a low grade felt.
Short staple wool possessing good felting properties is punched through burlap with barbed needles and then felted. Apparent consumption slightly decreased, however, much of the consumption has occurred not in home floor coverings unless for example, at the down-market end or for underlay, but in the automobile sector or other industrial applications like boats, airplanes etc.

1.2 Customs product classification
Products can be specified by the Harmonised Commodity Description and Coding System (HS). These numbers are used for both Customs and statistical purposes in EU member countries.
The number clearly identifies a specific product, so it is possible to see which manufacturing techniques are concerned and which materials are used.
Referring to the code number can therefore facilitate communication and eliminate misunderstanding about the type of household, furnishing and floor-covering textiles.

Chapter 57 for ‘Carpets and floor coverings’ and chapter 63 ‘Household and furnishing textiles’ are the relevant sections of the HS code. The key product group headings are:

HS Code	**Product group**
5701	Knotted carpets
5702	Woven carpets
5703	Tufted carpets
5704	Needlefelt carpets
5705	Other carpets
63.01	Blankets:
6302.10-6302.39	Bed linen;
6302.40-6302.59	Table linen;
6302.60-6302.99	Bathroom and kitchen linen
6303	Curtains
6304.11-6304.19	Bedspreads
6304.90	Other furnishing articles

Appendix I provides a detailed breakdown of the HS codes relevant to different types of home textiles within these major group headings.

Please note that the product groups falling under the HS codes presented in section 1.2 are not completely in line with the product groups mentioned in section 1.1. Moreover, different statistical sources use different product groups or specifications. This places limitations on in-depth interpretation of trade figures and of the possible relationships between import figures and production and consumption data.

2 INTRODUCTION TO THE EU MARKET

The European Union (EU) is the current name for the former European Community. Since 1 January 1995 the EU has consisted of 15 member states.
Negotiations are in progress with a number of candidate member states, many of which already have extensive trade and co-operation agreements with the EU.
It is envisaged that 10 of these countries will become members at the beginning of 2004. These countries are: Cyprus, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, the Slovak Republic and Slovenia. At 1 January 2001, the size of the EU population totalled 377.5 million, living in 152 million households, which indicates an average number of almost 2.5 occupants per household.
Forecasts announced that this number will decrease to 2.40 or even lower by the end of 2003.

The most important aspect of the process of unification (of the former EC countries), which affects trade, is the harmonisation of rules in the EU countries.
As the unification allows free movement of capital, goods, services and people, the internal borders have been removed. Goods produced or imported in one member state can be moved around between the other member states without restrictions. A precondition for this free movement is uniformity in the rules and regulations concerning locally produced or imported products. Although the European Union is already a fact, all the regulations have not yet been harmonised. Work is in progress on uniform regulations in the fields of environmental pollution, health, safety, quality and education.

On 1 January 1999, the Euro (€) became the legal currency within eleven EU member states: Austria, Belgium, Finland, France, Germany, Italy, Ireland, Luxembourg, The Netherlands, Spain, and Portugal. Greece became the 12th member in June 2000.
Their national currencies are now replaced by the Euro. Circulation of Euro coins and banknotes began on 1 January 2002 and gradually replaced national currency notes and coins, which were withdrawn by 1 July 2002. The most recent (but still preliminary) Eurostat trade statistics quoted in this survey are from the year 2001. On 1 January 1999, statistical and contractual values in ECU were converted into Euro on a 1:1 exchange rate.

Table 2.1 Overview population and households in the EU at 1 January 2001

	Total population in millions	**Number of households '000**	**Average number of occupants per household**
Austria	8.1	3,254	2.49
Belgium	10.3	4,230	2.42
Denmark	5.4	2,358	2.27
Finland	5.2	2,278	2.27
France	59.5	24,567	2.42
Germany	82.2	37,523	2.18
Greece	10.6	3,563	2.96
Ireland	38	1,253	3.03
Italy	57.8	20,158	2.85
Luxembourg	0.4	155	2.81
Netherlands	16.0	6,867	2.32
Portugal	10.0	3,456	2.90
Spain	39.5	12,558	3.14
Sweden	8.9	4,196	2.11
United Kingdom	59.8	25,727	2.31
EU	**377.5**	**152,143**	**2.48**

Source: Euromonitor

Table 2.2 Exchange rates of EU currencies in US$, 1998-2002

Country	Currency	1998	1999	2000	2001	Mid 2002
European Union	€	–	1.065	0.922	0.900	0.982
Denmark	Dkr	0.15	0.14	0.12	0.12	0.13
Sweden	Skr	0.13	0.12	0.10	0.10	0.10
United Kingdom	GB£	1.66	1.62	1.51	1.45	1.53

Source: CBS Statline (July 2002)

The Euro €/US $ exchange rate stands in October 2002 at US$ 0.982 for one €. In this market survey, the € is the basic currency unit used to indicate value.

Trade figures quoted in this survey must be interpreted and used with extreme caution. The collection of data regarding trade flows has become more difficult since the establishment of the single market on 1 January 1993. Until that date, trade was registered by means of compulsory Customs procedures at border crossings, but, since the removal of the intra-EU borders, this is no longer the case. Statistical bodies like Eurostat can no longer depend on the automatic generation of trade figures. In the case of intra-EU trade, statistical reporting is only compulsory for exporting and importing firms whose trade exceeds a certain annual value. The threshold varies considerably from country to country, but it is typically about € 100,000. As a consequence, although figures for trade between the EU and the rest of the world are accurately represented, trade within the EU is generally underestimated.

This market survey highlights the four major markets in the EU (Germany, UK, France and Italy) and The Netherlands. The major importers of household, furnishing and floor-covering textiles in the EU are Germany, UK, France, Belgium and The Netherlands. The ranking in order of consumption is UK, Germany, France, Italy and Spain.

3 CONSUMPTION OF HOUSEHOLD, FURNISHING AND FLOOR-COVERING TEXTILES

3.1 Market size

The EU market for household, furnishing and floor-covering textiles can be divided into a residential/ consumer one and a commercial/contract one.
Both markets have their own market structure and market characteristics and differ considerably in size.

The bulk of household, furnishing and floor-covering textiles purchasing in the EU during any particular year are for replacement purposes rather than a primary purchase. New housing accounted for only 1 percent of the total housing stock in the EU. That new dwellings account for such a relatively small number gives credence to the replacement hypothesis.
Furthermore, most purchases of household, furnishing and floor-covering textiles are made to replace old, worn or unfashionable textiles. These purchases can in most cases, be deferred or not, depending upon economic circumstances at a particular time.
The sizes of national markets for household, furnishing and floor-covering textiles reflect demographic factors (size of population, number of households etc.), levels of income, fashion developments, the consumer's preference for specific fibre type and the importance of home textiles in household purchasing decisions.

The EU consumer market for household and furnishing textiles amounted to € 20.5 billion in 2001 and showed a very small growth in the period under review.
Germany is still the largest market, followed at a shrinking distance by the UK. Other important markets in the EU are France, Italy and Spain.
The Netherlands ranked 6th before Belgium and Sweden. Five countries (Germany, UK, France, Italy and Spain) account for almost 80 percent of EU household and furnishing textiles consumption.
Consumers in the UK and Belgium are the biggest spenders per capita on household and furnishing textiles in the EU, followed by The Netherlands, Sweden and Germany. In South European countries like Portugal, Italy and Greece consumption was less than the EU average consumption.

There is a tendency that consumption in household expenditure grows in times of growth in income and consumption, but falls in periods where growth in incomes and consumption are low or negative.

In many EU countries, demand for textile floor coverings has suffered from a gradual, long-term shift towards other types of products, including wood, ceramic,

Table 3.1 Consumer expenditure on household and furnishing textiles in the EU, 1999-2001 *(€ million)*

	1999	2000	2001	% change 1999/2001	Per capita value in €, 2001
Germany	4,721	4,598	4,636	– 1.8%	56.40
United Kingdom	3,574	3,606	3,761	+ 5.2%	62.89
France	3,003	3,090	3,114	+ 3.7%	52.34
Italy	2,617	2,602	2,558	– 2.3%	44.26
Spain	2,018	2,120	2,188	+ 8.4%	55.39
Netherlands	926	940	928	+ 0.2%	58.00
Belgium/Luxembourg	647	658	655	+ 1.2%	61.21
Sweden	507	517	515	+ 0.2%	57.87
Greece	442	460	476	+ 7.6%	44.90
Austria	447	455	450	+ 0.7%	55.56
Portugal	412	417	422	+ 2.3%	42.08
Denmark	316	308	302	– 4.6%	55.92
Finland	260	270	277	+ 6.5%	53.27
Ireland	171	180	183	+ 7.0%	48.16
EU (15)	**20,061**	**20,221**	**20,465**	**+ 1.9%**	**54.21**

Source: Euromonitor

Table 3.2	Consumer expenditure on carpets and other textile floor coverings in the EU, 1999-2001 (€ million)				
	1999	**2000**	**2001**	**% change 1999/2001**	**Per capita value in €, 2001**
Germany	2,068	2,080	2,072	+ 0.2%	25.21
United Kingdom	1,735	1,867	1,875	+ 8.1%	31.35
France	1,428	1,406	1,392	– 2.5%	23.38
Italy	1,247	1,272	1,266	+ 1.5%	21.90
Spain	586	591	601	+ 2.6%	15.28
Belgium/Luxembourg	429	438	430	+ 0.2%	40.19
Netherlands	400	407	419	+ 4.8%	26.19
Sweden	357	360	355	– 0.6%	39.88
Portugal	248	258	260	+ 4.8%	26.00
Austria	235	232	226	– 3.8%	27.90
Denmark	212	215	210	– 0.9%	38.90
Finland	166	169	170	+ 2.4%	32.69
Greece	122	129	128	+ 4.9%	12.10
Ireland	117	113	115	– 1.7%	30.25
EU	**9,350**	**9,537**	**9,519**	**+ 1.8%**	**25.27**

Source: Euromonitor

cork and laminated floor coverings. In particular, wood and the much cheaper laminates increased in popularity in the last decade. The fall in broadloom carpets is partly compensated by increased sales in floor rugs.
In 2001, it was estimated that 152 thousand households of the 15 member states of the EU spent around € 9.5 billion at retail prices on carpets and carpeting, mainly in Germany, the UK, France and Italy.
France is neither a big per capita consumer for household and finishing textiles nor for carpets.
Life style and tradition appear to be major factors.
Belgium, Scandinavian countries and the UK have a high consumption per capita. German consumers were characterized for many years by a high demand for quality, however, in recent years imports of cheaper products increased too. German average per capita consumption is still above the EU average, but is much smaller than some years ago.

Commercial or contract market
The domestic market has a completely different market structure to the commercial or contract market.
The latter can be divided into governmental institutes: defence, health and hospitals etc. and the industrial market (business to business) including hotels.
Governmental institutes buy for a sharply declining part, via a governmental purchasing office.
Other possibilities are direct buying via manufacturers, via wholesalers, or renting or leasing via laundry companies. Laundry companies dominate the industrial market for towelling and, to a lesser degree, bed linen.

Total turnover of industrial laundries amounted about € 8 million in 2001, of which 40 percent in the health sector, 45 percent in trade and industry and 15 percent in hotels, restaurants and catering (refered to as horeca) and recreation. Distribution of towels and bed linen on the institutional and industrial market is in the hands of laundry companies like Initial/Hokatex, Berendsen, Nedlin etc.

Table 3.3 gives an overview of total textile consumption by the several categories of service industries.

The total expenditure of € 13.9 billion can be divided into expenditure on clothing (29 percent), textile floor coverings (23 percent) and household and furnishing textiles (48 percent). This means that total expenditure on household and furnishing textiles in the contract sector amounted to € 6.6 billion or 32 percent of consumer expenditure and carpets € 3.2 million or 33 percent of consumer expenditure.

Contrary to the consumer market, the biggest market is not Germany but the UK, followed by Germany and France. The Netherlands ranked sixth behind Italy and Spain.

Carpets, on the business to business (B2B) market or contract sector is the biggest product group in textile consumption by service industries, with destinations like offices, hotels, public buildings, hospitals, sport and holiday accommodations etc., followed by bed

Table 3.3 Textile consumption by service industries in the EU, 1999-2001

	1999 € bn	2001 € bn
Total market	**13.03**	**13.87**
of which:		
Wholesale and retail services (except goods for re-sale)	3.88	4.09
Business and personal services (banking, insurance, rental laundries etc.)	3.02	3.20
Public services (army, police, fire service and other public services)	1.51	1.64
Catering suppliers (hotels, restaurants, cafes and other catering suppliers)	1.56	1.66
Health services (hospitals, veterinary services etc.)	1.13	1.24
Transport and communication services (railways, airlines, buses, etc.)	1.08	1.16
Culture, education and leisure (theatres, sport clubs, libraries etc.)	0.85	0.88

Source: OETH

Table 3.4 Textile consumption by service industries in the EU per country, 1999-2001 *(€ million)*

	1999	2000	2001
United Kingdom	2,675	2,753	2,995
Germany	2,750	2,894	2,874
France	2,187	2,285	2,270
Italy	1,265	1,306	1,337
Spain	846	898	970
Netherlands	770	756	789
Sweden	603	618	640
Belgium/Luxembourg	563	574	590
Denmark	355	366	360
Portugal	266	270	280
Greece	290	301	310
Austria	281	288	271
Finland	89	93	94
Ireland	85	84	90
Total EU	**13,025**	**13,486**	**13,870**

Source: based on several sources

linen of which rental laundries, hospitals and hotels are the main customers. Other major product groups are curtains/upholstery and towelling.

Germany

Germany's economy is currently weak. Recent data indicates, however, that the economy is beginning to perform better, but this recovery is happening very slowly. GDP growth in the EU more than halved from 3.4 percent in 2000 to 1.5 percent in 2001, and is expected to have slowed down further, to 1.5 percent in 2002.

However, the largest economy in the EU grew more slowly and forecasts by the European Commission for growth in 2002 (0.8%) and 2003 (0.7%) are also lower than the EU average. The main causes of the weakness in spending on household textiles in Germany have been rising unemployment and low consumer confidence.

Consumer spending grew 2.4 percent in 1999. This development, however, did not result in higher consumption of household, furnishing and floor-covering textiles. Domestic household consumption growth is expected to have remained low in 2002.

Table 3.5 Consumer expenditure on household, furnishing and floor-covering textiles in Germany, 1999-2001 *(€ million)*

	1999	2000	2001
Tufted carpets	1,288	1,260	1,252
Knotted carpets	462	505	510
Woven and other carpets	318	315	310
Bed linen	1,394	1,407	1,421
Blankets, spreads etc.	127	121	117
Towelling	992	977	985
Kitchen and table linen	331	323	327
Curtains and other furnishings	1,877	1,770	1,786
Total	**6,789**	**6,678**	**6,708**

Sources: Eurostat, BBE, Textilwirtschaft

However, consumption is expected to grow by 2.7 percent in 2003 and to boost demand for textile and clothing.The retail market value (including VAT) for household textiles, furnishing and floor-covering textiles increased slightly (0.4%) after a fall of 1.6 percent in 2000 to € 6.7 billion in 2001.
The trend towards cheaper articles continued, caused by increased low-cost imports and fierce competition on the home market.

Tufted carpets play a dominant role in purchases by German consumers (and also for buyers of institutional projects). More important than in other EU countries, however, is the role of knotted carpets. It has to be noted that Germany is by far the leading importer of knotted carpets, though not only for the domestic market. A big share of these imports has been re-exported to other countries.
Bed linen comprises a wide range of products: from traditional to very modern. The output of bed linen by domestic producers has increasingly been replaced by imports, while producers of net curtains and ready-made curtains still have a strong position, including on export markets.

Expectations for expenditure on household, furnishing textiles and to a lesser degree for broadloom carpets (due to the popularity of other materials for floor covering) for the coming years are optimistic, for the following reasons:
- further growth in single-person households;
- ageing population and older people tend to spend more on their homes;
- levelling up of the standard of living of the former East German citizens to the level of former West Germans.

UK

The continued strength of consumer spending in the UK has surpassed expectations. Expenditure growth accelerated during 1999 to 4.2 percent and consumption was the driving force behind the UK's GDP growth of 2.1 percent. This was in spite of the negative impact of the strong currency on the trade balance.
Household expenditure grew by 4.1 percent in 2000 and 3.9 percent in 2001. The floor coverings market was estimated to be worth approximately € 3 billion in 2001, having experienced more moderate growth in the last two years compared with the buoyancy of the market in 1997-1998. Key characteristics of the market in recent years have included the rapid growth of the wood and laminated wood sector at the expense of other floor coverings materials, especially carpet.
The UK is the second largest household, furnishing and floor-covering textiles market in the EU, with almost 19 percent of total EU consumption.
The UK ranked second after Germany and since 1998 just above France. The market under review in the UK, which has 25.7 million households, was valued at around € 5.6 billion in 2001.

The UK market for bed linen is largely replacement driven. However, it has also been growing as a result of the availability of more exciting designs and add-on products, such as coordinating cushions and throws, leading to higher sales per customer.
Expenditure on bedspreads and throws grew, thanks to trends favouring the layering of products on beds and covering sofas with “throws”. UK consumers prefer heavier, bath type towels. Thus, while in terms of numbers the consumption of towels in Germany is much larger than in the UK, in terms of the weight of towels consumed per capita the UK is the highest in the EU. Demand for table and kitchen linen has been depressed as the move away from formal dining in

Table 3.6 Consumer expenditure on household, furnishing and floor-covering textiles in the United Kingdom, 1999-2001 *(€ million)*

	1999	2000	2001
Tufted carpets	1,404	1,524	1,530
Knotted carpets	71	74	76
Woven carpets	143	148	155
Felt and other carpets	117	121	114
Bed linen	1,091	1,105	1,156
Blankets, spreads etc.	90	92	97
Towelling	793	803	837
Kitchen and table linen	239	234	244
Window coverings			
– net curtains	168	170	176
– ready-made/custom-made	1,023	1,039	1,089
– curtain fabrics	170	163	162
Total	**5,309**	**5,473**	**5,636**

Sources: Trade estimates based on Eurostat

the UK has continued. Recently, consumer demand increased caused by more fashionable items. Within the market for window textiles, net curtains and ready-made curtains grew, while sales of fabric for making up declined. A further growth of the UK market is expected, as a result of:

- the housing stock in total is rising;
- an increasing number of households;
- developments in the retail sector, like a wide availability of household textiles at competitive prices and a growing concentration at retail level;
- increased cheap imports from other EU countries and from low-cost countries.

France

For 2001 as a whole, consumer expenditure in France increased by 2.9 percent, which was higher than in the previous years (2.5% in 2000 and 2.8% in 1999) but considerably less than the 3.4 percent achieved in 1998, a year which saw the strongest growth rate in France for over 20 years. Household expenditure growth of 1.6 percent is expected for 2002 and 2.8 percent for 2003. France is the third largest household and furnishing textiles market in the EU, with 15 percent of total EU consumption. The market was rather stable during the period under review, after a period of growth in the years 1997-1999. Consumption of textile floor

Table 3.7 Consumer expenditure on household, furnishing and floor-covering textiles in France, 1999-2001 *(€ million)*

	1999	2000	2001
Tufted carpets	762	748	744
Woven carpets	409	411	402
Knotted carpets	102	106	108
Other carpets	155	141	138
Bed linen	1,139	1,174	1,213
Blankets, spreads etc.	128	124	113
Towelling	381	364	379
Table linen	284	290	282
Toilet and kitchen linen	53	50	54
Curtains and other furnishings	1,018	1,088	1,073
Total	**4,431**	**4,496**	**4,506**

Sources: Trade estimates

coverings decreased (2.5%), while consumption of household textiles (2.8%) and furnishings (5.4%) increased in the period 1999-2001. In common with other major EU countries, however, the polarisation of the market continued with low-priced products of cheap materials bought in low-service outlets (super- and hypermarkets) and high-priced exclusive products bought at specialized service retailers.

Curtains included for 45 percent net curtains, 20 percent ready-made (heavy) curtains and 35 percent curtain fabrics by the metre. Consumer expenditure on household, furnishing and floor-covering textiles in France per capita and household is much lower than in the UK, for the following reasons:

- homes in the south of the country, where the climate is more Mediterranean i.e. warmer, are more simply furnished;
- number of rented (and therefore fewer owner-occupied) residents is higher.

The increased attention in the last decade by (home) magazines and television for interiors led to more fashionable products in the household and furnishing sector, in particular bed-linen (sheets and duvet covers), while demand for products like bedspreads and throws decreased.

Italy

For many years, consumption in Italy has been weak compared to the rest of the EU. Household expenditure picked up with a growth of 2.7 percent in 2000, after two years of slowdown, but for 2001 growth was limited to 1.1 percent. Expected growth for 2002 is 1.7 percent and for 2003 it is 2.3 percent. Italy is the fourth largest household, furnishing and floor-covering textiles market in the EU with € 3.8 billion in 2001, which accounted for 13 percent of total EU consumption. Carpet consumption in Italy is relatively low because of the warm climate which makes hard flooring a more popular choice and because of significant regional disparities. The North of the country is highly industrialized and wealthy in consumer terms, compared to the much poorer southern regions where disposable income is considerably lower. Floors made of stone, covered with tiles or made of wood are the norm. While rugs or squares supplement the decoration of the home, they appear not to be a primary requisite. Wall-to-wall carpeting apart from in hotels remains unusual.

Tufted synthetic carpet is the main type purchased in broadloom carpets, but woven and hand-knotted qualities are also significant in the loose floor rug sector, which is relatively strong owing to the preponderance of hard floors in Italian homes. Just like in other major EU markets, bed linen is by far the most important product category in household textiles, despite the warmer climate. A growth of 2-3 percent is expected for the coming years, after a period of stabilizations and even a slight decrease in 2001.

The Netherlands

For 2001 as a whole, consumer expenditure in The Netherlands increased by 1.2 percent, which was much lower than in the previous years: 3.8% in 2000, 4.5% in 1999 and 4.8% in 1998. The latter was the highest growth rate in The Netherlands for many years. Household expenditure growth of 2.1 percent is expected for 2002 and 3.3 percent for 2003. The Netherlands is the sixth largest household, furnishing and floor-covering textiles market in the EU,

Table 3.8 Consumer expenditure on household, furnishing and floor-covering textiles in Italy, 1999-2001 *(€ million)*

	1999	2000	2001
Tufted carpets	540	522	516
Knotted carpets	184	188	190
Woven carpets	215	232	226
Other carpets	308	330	334
Bed linen	1,025	1,045	1,032
Blankets, spreads etc.	110	103	105
Towelling	322	314	321
Kitchen linen	54	55	52
Table linen	250	240	244
Curtains and other furnishings	856	845	804
Total	**3,864**	**3,874**	**3,824**

Sources: Eurostat,

Table 3.9 Consumer expenditure on household, furnishing and floor-covering textiles in The Netherlands, 1999-2001 (€ million)

	1999	2000	2001	% change 1999/2001
Tufted carpets	286	290	300	+ 4.9%
Knotted carpets	38	40	40	+ 5.3%
Woven and other carpets	76	77	79	+ 3.9%
– bed linen	218	234	232	+ 6.4%
– blankets, spreads etc.	27	23	24	– 1.1%
– towelling	127	122	124	– 2.4%
– kitchen and table linen	54	57	55	+ 1.9%
Curtains and curtain fabrics	395	390	375	– 5.1%
Net curtains	105	114	118	+ 12.4%
Total	**926**	**940**	**928**	**+ 0.2%**

Source: trade estimates based on Eurostat

after the four major countries as discussed above and Spain. Consumer expenditure on household and furnishing textiles in The Netherlands showed a very slow growth in the period 1998-2001 and amounted to around € 928 million in 2001, of which € 435 million concerned household textiles.
Growth of household linen was rather limited just under 1 percent yearly on average, while curtains (other than net curtains) showed a fall of yearly 2.5 percent.
The strong growth in net curtains (6.2 percent yearly) can be declared by the trend in transparent curtains.

The market for household textiles fell by less than 1 percent in value and 1.3 percent in volume, this means that average prices rose by 0.5 percent. Almost 50 percent of consumer expenditure on bed textiles concerned quilt covers. Cover sheets are the most important in the category bed sheets. Expenditure on sheets, blankets and bedspreads decreased steadily during the last decade.

Types of window coverings change regularly, besides the traditional (heavy) curtains whether or not combined with net curtains there are (roller) blinds, folding curtains, horizontal and vertical slats for blinds. For two decades, these so-called soft materials (textiles) competed with hard materials like aluminium, wood etc. Hard materials are mainly used for sun protection and often combined with curtains. Curtains other than net curtains include for 72 percent made-to-measure curtains, 20 fabrics by metre and 8 percent ready-made. The category of net curtains consists mainly of made-to-measure curtains. The average sq. meter price is about the same level as for curtains.

A further growth of the Netherlands market is expected, as a result of:

- demographic developments like an increasing tendency for young people over the age of 18 to set up their own households independently of the parental home; rising divorce rates and rising numbers of single-parent families lead to an increase in the number of households; and, an increasing proportion of elderly households;
- developments in the retail sector like a wide availability of household textiles at competitive prices and a growing concentration at retail level.

3.2 Market segmentation

The demand for household textiles, furnishings and floor coverings, as for almost all textile consumer products, is principally determined by the size and structure of the population, number of movings and new dwellings, level of income, prices of household textile goods relative to other products competing for consumer expenditure, consumer preferences for individual fibres and for brands, fashion influences on textiles, interior trends and other influences. Many of these factors are basis criteria for market segmentation and will be discussed below, while the markets like consumer/ residential and commercial/contract have already been discussed in this chapter.

3.2.1 Demographic criteria

The size and age structure of the population and, more significantly, the number and life stage of households are basic determinants of the levels of expenditure on all household, furnishings and floor coverings. In most of the EU countries there is an increasing rate of household formation, caused by developments described in the previous chapter.

The EU population has an ageing structure. Healthy and active senior citizens make up an important and growing market segment. In 2000, about 40 percent of the total population was older than 45. This age group will have a growing share of available disposable income and, although they often have all they need in terms of furnishings, their growing number makes them an important target customer group.
In general, the popularity of carpet compared to hard flooring is greater in households of older people because they place a higher priority on warmth, insulation and comfort than younger households, which tend to prefer hard flooring.
Because of their preference for hard flooring, younger consumers, particularly the age group 25 to 45, are the key target group for loose floor rugs, and are motivated to buy by the availability of a large variety of different types of rugs, designs, colours and materials and by the frequent introduction of new fashions and interior trends.
The number of households in the EU, which is now more than 152 million, is expected to grow in the coming years, one reason being the addition of 10 new member states (see Chapter 2 Introduction to the EU market).

3.2.2 Socio-economic criteria

The state of the housing market, disposable income and the preparedness of consumers to spend on the interior of their homes are significant influences on the household, furnishing and floor covering market. Spending on furniture and carpets is closely linked to developments in the housing market. Like other durable goods, the pattern of expenditure is very sensitive to the business cycle. Spending on household textiles and furnishings is also related to the purchase of houses, but is less cyclical than the furniture and carpet markets. Low interest rates in the EU in the period under review have acted as a boost to the housing market, which has in turn encouraged spending on furnishing textiles. Other factors have, however, had a negative influence on this spending, like a rather low consumer confidence and growing unemployment. Finally, the forecasts are a growth of 2-3 percent expenditure on household and furnishing textiles for the coming years in most of the EU member states.
Unfortunately, although overall sales of floor coverings have increased, the carpet sector has not benefited greatly, because of the swing towards hard floor alternatives.

3.3 Consumption patterns and trends

Not only the availability of disposable income but also the need/desire to spend it on the home interior is an important factor determining the level of expenditure on the home interior. Consumption habits of households vary substantially across Europe, due to differences in culture, traditions and tastes.

Several factors cause a continuation of the historically divergent trends in consumption patterns, including:
- large differences in overall private consumption;
- dissimilar habits and cultures, from the Catholic south to the protestant north west;
- wide variations in standard of living; and
- differences in climate from the Mediterranean south to the alpine climate of Scandinavia.

Household, furnishing and floor-covering textiles accounted for 0.77 percent of household expenditure in the EU in 2000, whereas this percentage was 0.92 percent in 1990, while consumer expenditure grew on sectors like health, housing/energy, transport/communication and leisure/education activities.

In 2001, spending on household, furnishing and floor-covering textiles was significantly higher than the EU average in the UK, The Netherlands, Belgium, Germany and Italy, while it was lower than the EU average in Italy and Spain. Spending in two other major markets, Germany and France, were respectively just above and just below the EU average.

The average consumer attaches a high level of importance to the overall ambiance of his or her home interior, not only in the main living area but also in areas like kitchen and bedroom during the late 90s and early in the new century. Key priorities include:
- nest-building – creating a warm, comfortable and cosy place to retreat from the hectic world outside. Consumers increasingly see their home as a retreat from the stresses of everyday life;
- personal freedom – although influenced by current interior fashion, today’s consumer chooses carpets, floor rugs and other furnishings to create his own individual interior, which is often a mélange of different styles, combining old with new, neutral with exotic, exclusive modern design with timeless, natural backgrounds with decorative accent colours etc. This is combined with the huge availability of decorative fashionable items (fabrics, floor rugs, vases, plant pots, picture frames, accessories), even at cheap prices, which can be used to create special and different effects in the home;
- popular hobby – collecting new ideas, following interior trends and shopping around for alternative furnishings have become important leisure activities for some consumers and changing the interior of their houses is a permanent process. This ‘hobby’ has been stimulated by the increasing number of specialised interior shopping malls, magazines and TV programmes dedicated to home interiors;
- ‘value for money’ – consumers will remain intensely price-conscious, seeking value for money. A further shift towards self-assembly products could take place in some countries.

3.3.1 Fashion in textiles and interior

Fashion in household, furnishing and floor-covering textiles is strongly related to fashion developments in furniture. Fashion trends in carpets, floor rugs, curtains and household textiles must necessarily be in harmony with those of furniture, kitchen equipment, beds etc. and fashion requires substantial investment in creativity: highly skilled designing, the right colours, materials etc.

Fashion in household textiles does not change quickly and trends continue for nearly 3 to 4 years.

This period can however be longer for textiles like curtains and carpets.

Bed, bath, table and kitchen linen are no longer considered to be just plain utility items. Fashion has entered into the production and promotion of these textiles in a big way. The predominantly white textiles of 20 years (and longer) ago and light pastel shades of 10-15 years ago have given way to bright or even dark colours and an amazing variety of patterns, especially prints. Nowadays, white sheets are only used in hotels and hospitals, but certainly not in all of them either.

There are distinct seasonal preferences and there is also a tendency to maintain or create a kind of scheme affinity between the various fabrics and house decor in general.

Colour trends are more or less uniform in several EU countries like Germany, Denmark, United Kingdom and The Netherlands. However, in France and Belgium, colours just like designs, may be completely different.

Generally spoken, design trends become more and more individual and no major single trend can be seen, as it could in past years. Instead, several distinct trends are moving side by side forming a composite fashion flow.

The trend has been increasingly away from 'traditional' heavy furniture towards modern lighter designs, frequently sold by large outlets in kit form for DIY assembly. These outlets also have household textiles in their assortment of which colour, design etc. are in harmony with furniture, kitchen, beds etc.

Harmony in the colour or design of the terry materials is no longer a problem. In the fashionable terry themes, the colour, design variations or decorative effects are co-ordinated with each other, so that you can combine everything from washing glove to bath and guest towels, including the bathrobe. A plain colour is still most commonly used for bath linen, followed by stripes. Changes in colour preferences are very slow, white and soft pastel colours are always popular.

Soft pastels, like blue and pink are losing market share, at the cost of strong pastels, bright and even dark colours.

Prints are the most popular for quilt covers, but single colours – light or dark – for bed sheets.

The demand for pillowcases mainly depends on the buying pattern, usually single colour, matching the sheets, but also printed, matching quilt covers.

Fashion trends

The carpet industry and trade is today a fashion sector which, like the clothing industry, must continually adapt to new trends in design, colour and the use of materials. The main manufacturers of wall-to-wall carpet launch new carpet ranges every year to meet the fashion demand for different colours, textures and surface structures and to introduce technical improvements in terms of quality and finish.

Similarly the strong trend in hard flooring combined with the interest in decorative interiors, has stimulated the importance of floor rugs as a fashion/design feature for many consumers.

Current interior trends are characterised more by the need for quality and comfort than perfect style.

After a period of long and recent years, that have seen carpets run through all the styles and patterns possible, almost seeking to show that the weaving and printing techniques were able to express every possible design or colouring imaginable by the designers.

The new millennium scenario seems to suggest a more logical and focused course.

On the one hand, for the contract sector destinations – offices and public locations but above all hotels – the refined and contemporary designs are affirmed as the winning style, even if not totally supplanting the classical and everlasting decorum of the Axminsters. Tone-on-tone and structure plays are exemplary, for example, in luxurious woven wool collections; an example for all is the new 'Legend' collection by Louis de Poortere. In the high-range synthetic carpets, the Vorwerk range excels for minimalist (but not poor!) refinement (this firm specifically entrusted a pool of internationally active architects for its new lines, with 'high design' outcomes), undoubtedly in first place for stylistic research, but also the new collections from Dura and Anker.

As for the textile floors destined for the residential market, the inventive range is decidedly broader, in order to comply with all the furnishing styles of the various countries. Alongside the classic plains, where the warm colours and pastel shades win over the classic greys or cold tones of the 1980s and 1990s dwelling cultures, small geometrical patterns are intervening and increasingly taking hold, often highlighted in high/low textile structures for a more 'vibrant' floor. All the major international houses have in any case included collections featuring a high degree of personalisation options (logos, brand names, designs, formats, etc.) in their game bag, almost to underline that the globalisation era is light years away from the product's down-market standardisation.

Furthermore, carpet performances are ever more hi-tech, with characteristics that range from the various flame retardance certifications to resistance performances against (practically) all causes of wear.

Regarding the latest trends of household linen and furnishings it is difficult to define an exact tendency since the chromatic explosion has involved the classical and the modern, the ethnic and the floral, the geometric and the plain. The most evident tendency on the latest Heimtextiel trade fair is the domineering and widespread return of colour. Disappeared, vanished, is the minimalism of the grey and rigorous tones, now it is all a festival of intense shades, sunny colours, reds and yellows, greens and blues. But more: colour is becoming the paradigm upon which coordinated textile ideas are constructed. The 'return of colours' transversal common denominator that allows the bed, bath (and sometimes with extensions even to the table) linens to speak the same language. As far as the usage trends for the various merchandise categories are concerned, the duvet cover/ padded solutions are having ever-greater success, also in the Mediterranean area of Europe.
By now the collections dedicated to this 'young' and practical system for bed adornment carries the same weight as the more traditional sheets. The duvet covers are also the 'training ground' on which more innovative techniques for textile decoration are being experimented, for example photographic prints. The ethnic themes are continuing to enjoy success, whether in the bolder versions (Africa and its 'wildlife' are very popular), or in the more tranquil ones that often proceed in step with 'Country' and 'Folk'.

3.3.2 Quality/price

Fierce competition and overcapacity in carpet factories in Belgium and other EU countries led to the use of very aggressive price competition as a marketing tool in the 1980s and first half of the 1990s. The availability of cheaper products to the consumer considerably lowered the image of carpet, which, furthermore, is frequently laid free of charge by retail furnishing companies. There is evidence that this 'buy and throw away' mentality has given way to more serious consideration of quality and durablity in the purchase of carpets. Quality aspects like durability, colour fastness, anti-soiling finish and ease of cleaning are becoming more important factors influencing purchasing decisions. However, because a high proportion of carpet is now bought for use in bedrooms and other upstairs rooms, rather than the main conspicuous living area of the house, price remains a critical determinant.
A consumer survey in The Netherlands concluded that, in choosing new carpet, the consumer is influenced primarily by colour, secondly by price and thirdly by quality.

3.3.3 Brands

Brand names influence purchases of carpets less than colours, appearance and the advice/service received by the retailer. Surveys of the trade have shown that nearly one half of consumers is unable to spontaneously name a leading carpet brand.

Nonetheless major brand names do dominate carpet sales in The Netherlands and about ten leading Dutch and Belgian brands (manufacturer brands and private labels) account for nearly three-quarters of the total retail carpet market. Well-known brands include Louis de Poortere, Ambiant, Anker, Berry Floor, Desso, Domo, Intercarpet, Besouw, Lano, Dersimo, Interface, Tretford, Due Palme etc.

In the floor-rug sector there is little emphasis on brands. Purchases are determined more by interest in special designs, colours and structures which the individual consumer can use to coordinate or accentuate the decor of his own interior. In the small market for imported expensive, fine hand-knotted oriental carpets, proof of authenticity is of course extremely important.
In the household textile sector, brand awareness by consumers is limited, as can be derived from the high market shares for interior department stores (Ikea, Habitat) and variety chains (Marks & Spencer, Hema) operating with their own private label and textile discounters, super and hypermarkets selling unknown or fancy brand names.

Examples of brand names (mainly operating in the higher segments) in the household sector are Zucchi, Bassetti, Descamps, Marzotto, Santens, Clarysse, Cinderella, Van Dijck, Pretti, Zambaiti etc.
Well-known brands of curtains are Ado, Gardisette and Cordima, while manufacturer names of other furnishings are among others Sodahl and Le Jacquard Francais, Graziano.

3.3.4 Promotion and presentation

Promotion and publicity by the carpet trade is a significant influence on the consumer's choice of floor covering. In some EU countries (UK, Germany, Belgium and The Netherlands) carpet image campaigns have been made by industry and/or trade to improve the general perception of carpet, relative to wooden and other hard flooring, the latter having risen dramatically in popularity. The carpet trade, in cooperation with test institutes and consumer organizations, introduced a valued, objective, reliable and controllable tool for consumers in their choice of suitable carpet, for instance: PIT (carpet product information system) in The Netherlands.

Although new furnishings chosen by households are increasingly a matter of individual choice and taste, consumers are heavily influenced in the orientation phase by different sorts of promotion, such as:

- **media:** interior magazines, women's magazines and glossy magazines, all exert a continuous passive influence on their readers; the increasing number of television programmes featuring creative ideas for interiors, home improvement suggestions and instructions are also a source of inspiration;

- **catalogues** of big interior store groups like Ikea and Habitat and of mail-order houses like Neckerman, Otto, La Redoute etc. are important reference sources just like the house-to-house brochures and leaflets distributed by major chains, member shops of buying groups and the discount chains which give consumers comparative information especially with regard to competitive prices;
- **consumer fairs for home and garden.** This type of fairs is organized in nearly all EU countries with different themes, sizes, frequency and with regional or national character. The fairs serve as sources of inspiration.

3.3.5 Climate

The climate of a country is an important factor influencing demand for bed linen, furnishing and floor-covering textiles. The colder climate of Northern Europe relative to more southern regions is a factor which strongly contributes to the high per capita consumption of carpets and curtains in Scandinavian countries, The Netherlands and other major market areas like Germany, United Kingdom and northern France.
In warmer climates, such as in southern Europe, blinds and shutters are often preferred to curtains. Demand for warm bedding is also lower in warmer climates.

4 PRODUCTION

EU textile industry
The EU textile (including man-made fibres) and knitting industry employing 1.2 million people in 66,900 companies in 2001, represents an industrial sector with a total turnover of € 121 billion.
The share of carpets can be estimated at € 7.0 billion, household textiles at € 8.4 billion and furnishing textiles at € 3.2 billion in 2001.

EU carpet industry
The EU has a major carpet manufacturing industry which produced 1.1 billion square metres in 2001.
The principal products are tufted and needlefelt carpets, much smaller volumes of woven floor coverings and a very limited output of knotted carpets.

Carpet production is fairly concentrated in a small number of member states, of which Belgium is the most important, especially as a manufacturer of tufted and needlefelt carpets. Belgium accounted for about 45 percent of total EU production in 2001 and carpet production (in volume) can be divided into 18 percent woven, 56 percent tufted and 25 percent needlefelt.
The volume of carpet production among many of the EU manufacturers has decreased in recent years as can be derived from table 4.2. Decreasing consumption in the domestic sector can be partly compensated by increasing exports to the USA and East-European countries, as well as a stable demand of the contract sector (hotels, offices, public utilities) in the EU countries.

Table 4.1 EU textiles and knitting production structure, 1999-2001

	1999	2000	2001	% change 2001/2000
Textiles				
Total employment (‘000)	689	668	656	– 1.8%
Number of companies	34,447	34,102	33,829	– 0.8%
Investment (€ billion *)	5.42	5.75	5.17	– 10.8%
Turnover (€ billion)	92.0	98.6	97.5	– 1.2%
Knitting				
Total employment (‘000)	535	520	500	– 4.0%
Number of companies	32,448	31,532	30,601	– 3.0%
Turnover (€ billion)	29.4	29.7	28.5	– 4.0%

Source: Eurostat

**) including knitting industry*

Table 4.2 EU production of carpets, 1999-2001 (million m^2)

	1999	2000	2001	% change 2001/1999	Value in 2001 € million
Belgium	508	514	490	– 3.5%	3,180
Germany	159	155	147	– 7.5%	1,002
Netherlands	144	145	151	+ 4.9%	981
UK	141	136	125	– 11.3%	855
France	102	90	86	– 15.6%	490
Other countries	81	80	82	– 6.8%	515
Total	**1135**	**1120**	**1081**	**– 4.8%**	**7,023**

Derived from several sources

The output of the EU carpet industry is dominated by tufted carpet, which typically accounts for 67 percent of the total annual volume manufactured. World-wide tufted carpet production decreased from 2.45 billion square metres in 2000 to 2.36 billion in 2001. Production in China and the Middle East increased, but decreased in the EU. Production in the major EU countries decreased, except in The Netherlands. Production of tufted carpets in Belgium decreased by approximately 6 percent during this period, in France by more than 10 percent, in Germany 5-6 percent and in the UK more than 8 percent.

Leading manufacturers in the EU are: Balta Group (Belgium; turnover € 481 million in 2000); Borgers Group (Germany; € 363 mln); Desseaux (Th Netherlands; € 360 mln); Ideal Group and Domo Group (both in Belgium, respectively € 334 and 253 mln), Allied Textiles and Carpet International (both in the UK, resp. € 220 and 221 mln). The collections of Vorwerk, Anker, Dura, Brintons, Louis de Poortere and Due Palme (Radici) are mentioned as good examples of technical and aesthetic innovation.

EU household and furnishing textiles industry
World-wide, manufacturing of household textiles has been dominated by some big concerns from the USA (Pillowtex, Springs Industries and West Point Stevens) and Italy (Zucchi). Growing concentration in retail and increasing competition from low-cost imports led to strategies like increase in the efficiency and broadening the assortment for manufacturers. Combined with developments in consumption, consumers demand a wider choice of fashionable products at low prices. Manufacturers in the EU focus on high value products with a high design content, export on a global scale by supplying to the higher segments of the market and source basic products from lower-cost countries. Leading household textiles manufacturing companies or groups on the EU market are: Gruppo Zucchi (Italy; turnover € 375 million in 2000), Bassetti (Italy; € 306 mln), Balta Industries (Belgium; € 270 mln), Chapelthorpe (UK € 207 mln), Girmes Textile (Germany; € 192 mln), Bierbaum Textilwerke (Germany; € 132 mln), Lafuma (France; € 132 mln), Santens (Belgium; € 81 mln).
Italy remained the leading producer of furnishing textiles in 2001 with a total production of 55,000 tons, followed by Belgium (41,000 tons), Germany (34,000 tons), Spain (30,000 tons) and France (21,000) tons.

Table 4.3 Production of household and furnishing textiles in the EU, 1999-2001 (in ‘000 tons)

	1999	2000	2001	% change 2001/2000
Bed linen	102.6	101.7	100.8	– 1.8%
Cotton terry towelling	64.2	64.0	63.7	– 0.8%
Other household linen	44.9	44.7	43.0	– 4.2%
Blankets	43.2	42.0	39.7	– 8.1%
Furnishing textiles	215.6	216.6	218.8	+ 1.5%
Total	**670.4**	**669.0**	**666.1**	**– 2.2%**

Derived from several sources

Table 4.4 Production of household, furnishing and floor-covering textiles in Germany, 1999-2001

	1999		2000		2001	
	volume	**€ '000**	**volume**	**€ '000**	**volume**	**€ '000**
Carpets	**'000 m²**		**'000 m²**		**'000 m²**	
– woven	4,390	96,909	4,678	108,288	4,378	101,448
– tufted	97,185	655,978	92,621	683,275	86,011	596,741
– felt	57,900	317,558	57,824	307,649	56,317	303,752
Total carpets	**159,475**	**1070,445**	**155,123**	**1099,212**	**146,706**	**1001,941**
Household linen	**'000 units**		**'000 units**		**'000 units**	
Blankets	7,341	86,301	8,195	84,767	8,334	83,686
Bed linen	29,262	215,487	30,532	227,911	30,569	226,406
Table linen	10,007	74,326	7,992	62,249	7,577	53,539
Cotton terry towelling	21,900	73,271	20,437	66,558	19,605	60,529
Other household linen	1,617	2,185	1,841	2,625	1,830	2,600
Total household linen	**70,127**	**451,570**	**68,997**	**444,110**	**67,915**	**426,760**
Furnishings	**'000 m²**		**'000 m²**		**'000 m²**	
Curtains etc.	38,730	127,757	18,412	114,416	14,524	105,319

Source: Statistisches Bundesamt

Germany

The leading manufacturer in the shrinking textile floorcovering market is the Borgers Group, turnover € 363 million in 2000, Ideal Group (Schaeffer): € 206 mln, Wirth Fulda Group € 187 mln.
Production of household, furnishing and floor-covering textiles in Germany continued the trend of a decreasing output in 2001. Total turnover increased by less than 2 percent, despite the fall in production.
About 200 companies are active in this sector in Germany with 22,000 employees. Major companies in the sector are Girmes, with a turnover of € 192 million in 2000, Bierbaum Textilwerke (€ 132 mln), Ado (€ 102 mln), Delius and Schmitz-Werke.

UK

As a manufacturer of carpets in the EU, the UK has since 1999 been the fourth most important, ranked behind Belgium, Germany and The Netherlands and ahead of France. Despite the historical connections with Axminster in Devon and Wilton in Wiltshire, where two major methods of woven carpet manufacture originated, carpet production in the UK is overwhelmingly of tufted carpets. Fluctuations in output of domestic production has been quite limited, despite the negative developments in UK exports, as the result of the position of pound sterling and the repercussions from the crises in Asian economies.
Major British manufacturers include among others: Carpets International UK (a subsidiary of Shaw Industries of the USA), Stoddard Sekers (manufactured Axminster and Wilton carpets and include BMK, Louis De Poortere, S. Lyles and Stoddard), Brintons, Allied Textiles, Tomkinsons, Ulster Carpet Mills (owned by the Wilson family), Ryalux, Burmatex (a subsidiary of Sirdar), Lamont Carpets & Yarns (based in Northern Ireland, including Northern Ireland Carpets) and Interface Europe (a subsidiary of Interface USA). The leading manufacturer of household linen in the UK is Chapelthorpe, turnover € 207 million in 2000.

France

Output by the French carpet industry decreased almost 18 percent in the period 1999-2001, due to a fall in domestic consumption, increased pressure from imports and a moderate decrease in exports.
Tufted carpets and rugs showed the lowest fall by 10 percent, as can be derived from the table below.
Leading producers in France for furnishing textiles are Aerazur (turnover € 155 million in 2000), for household linen Lafuma followed by Descamps and Venillia (respectively € 132, 116 and 52 mln) and for carpets Tarkett Sommer (€ 78 mln).

Table 4.5 Production of household, furnishing and floor-covering textiles in UK, 1999-2001

	1999	2000	2001	% change 2001/2000
	million m^2	**million m^2**	**million m^2**	
Tufted carpets	101	98	93	– 8.1%
Woven carpets	16	15	13	– 18.7%
Felt and other carpets	24	23	19	– 20.8%
Total carpets	**141**	**136**	**125**	**– 11.3%**
	tons	**tons**	**tons**	
Bed linen	7,213	7,070	6,860	– 4.9
Cotton terry towelling	3,123	3,102	3,073	– 1.6
Other household linen	718	714	692	– 3.6
Blankets	1,854	1,798	1,759	– 5.1

Derived from several sources

Table 4.6 Production of household, furnishing and floor-covering textiles in France, 1999-2001

	1999	2000	2001	% change 2001/2000
	'000 m^2	**'000 m^2**	**'000 m^2**	
Carpets and rugs				
– woven	10,310	6,976	6,660	– 35.4%
– tufted	71,352	68,440	64,070	– 10.2%
– felt and other	20,810	14,164	13,620	– 34.5%
Total carpets	**102,672**	**89,580**	**84,350**	**– 17.8%**
	tons	**tons**	**tons**	
Blankets	3,840	3,780	3,630	– 5.5%
Bed linen	20,282	20,035	19,725	– 2.7%
Table linen	2,119	2,075	1,965	– 7.3%
Bath and kitchen linen	4,504	4,435	4,380	– 2.7%
Total household linen	**30,745**	**30,325**	**29,700**	**– 3.4%**
Total furnishings	**9,885**	**9,555**	**9,480**	**– 4.1%**

Source: SESSI

Italy

Although Italy is a major producer and exporter of furnishings the carpet manufacturing sector is not large. Just like the household and furnishing textiles industry, the carpet industry is highly fragmented and is characterised by a large number of comparatively small manufacturers, each of which tends to specialise in a specific product group. Total production of carpets can be estimated at about 10.0 million square metres.
The lack of accurate statistical information is the result of the high number of small companies, while the official statistics only register firms with more than 20 employees.

Italy had the largest production of blankets and furnishing fabrics within the EU. Italian producers are specialized in high-quality furnishing fabrics and are highly export oriented. The fall in production of household textiles in terms of volume continued, however this fall is rather limited in a major product

group like bed linen. Five Italian manufactures: Zucchi, Bassetti, Zambaite Group, Oltrone and Newdress, together represent a large slice of the Italian household linen output and also perhaps the European output, given the ramifications of the Zucchi/Bassetti Group. The Zucchi Gruppo is the leading manufacturer with a total turnover of € 375 million in 2000.
Besides its own label, Zucchi operates with brand names Bassetti and Eliolona and in France with Jalla, Descamps and Bera. Zucchi is also the producer of household textiles under designer names like Valentino, Cardin, Dior and Saint Laurent.

The Netherlands

The Netherlands is a significant manufacturer of carpets. It ranks second in the EU after Belgium and is the world's second largest carpet exporter after Belgium. Almost 85 percent of total carpet production was exported in 2001. Many Belgian companies have factories in The Netherlands and use Dutch manufacturers for subcontract production, but there is similar traffic in the other direction. 30 companies with 3,000 employees produced 151 million m^2 in 2001. Major carpet manufacturers in the Netherlands are: Desso, Bonaparte, Parade and Van Besouw.
More than 80 percent of the manufacturers is active in the domestic sector as well as in in the contract sector.

The market share of domestic producers of household textiles is very limited. Only 6 manufacturers are active in the household textiles sector; their total sales amounted to € 28 million in 2001, of which almost 40 percent was exported. Many industrial companies became active in converting, this means that production has been relocated to low-cost countries.
The leading industrial company of household textiles is Ten Cate Houstex with brand names like Cinderella and Arli for bed linen, Seahorse (terry towelling), DDDDD (kitchen linen).

Table 4.7 Production of household, furnishing and floor-covering textiles in The Netherlands, 1999-2001

	1999		2000		2001	
	volume	**€**	**volume**	**€**	**volume**	**€**
	mln m²	**millions**	**mln m²**	**millions**	**mln m²**	**millions**
– woven carpets	n.a.	46	n.a.	46	n.a.	42
– tufted carpets	216	652	233	708	248	722
– felt carpets	33	61	32	60	30	58
	'000 units		**'000 units**		**'000 units**	
Bed linen	2,451	37	2,393	35	2,281	28
	'000 m²		**'000 m²**		**'000 m²**	
Curtains etc.	1,172	60	1,447	76	1,609	88

Source: CBS

5 IMPORTS

5.1 EU imports of household, furnishing and floor-covering textiles

Before we take a look at the import figures for household, furnishings and floor-covering textiles into the EU, it should be noted that all data presented in this chapter are official trade figures provided by Eurostat. We therefore refer to the remarks in chapter 1 and 2, explaining that official statistics are not always all-embracing and should be interpreted with care.
Total EU imports of household, furnishing and floor-covering textiles amounted to € 8.8 billion in 2001. Germany remained the leading importer, with an import share of 27 percent in terms of value, followed by the UK (23%), France (13%), Belgium and The Netherlands (each country 6%). Italy ranked sixth with 5 percent, followed by Austria (4%).
The import share of the UK was almost 19 percent in 1999 and 23 percent in 2001, caused by an intense competition on retail level and the position of the national currency (pound sterling). The difference between imports by Germany and the UK became much smaller.

EU imports of household, furnishing and floor-covering textiles increased by 8.8 percent in the period 1999-2001, of which 8.5 percent in the period 1999-2000.

EU countries can be divided, as to developments in value of imports (annual average) during this period, into:

- Sharply falling imports (less than 6%) in Greece, Portugal and The Netherlands;
- Slowly falling imports (less than 1%) in Germany;
- Slowly growing imports (less than the EU average of 4.4%) in Luxembourg; Belgium, Italy and France,
- Fast growing imports (more than 4.4% and less than 10%) in Austria, Finland and Denmark,
- Booming imports (more than 10%) in Ireland, Sweden, Spain and UK

Developments in imports of household, furnishing and floor-covering textiles vary strongly per EU country. This depends on several factors like size and structure of domestic production, the possibilities and size of re-exports and developments in demand as described in chapter 3.1.
Average import prices increased by 5 percent in 2000 caused by higher import prices of major product groups like tufted carpets and bed linen.
45 percent (in value) of total EU imports concerned floor coverings of which almost half was tufted carpets, 42 percent concerned household textiles (of which 46% bed linen and 26% cotton towelling) in 2001.

Figure 5.1 EU imports of household, furnishing and floor-covering textiles, 1999-2001

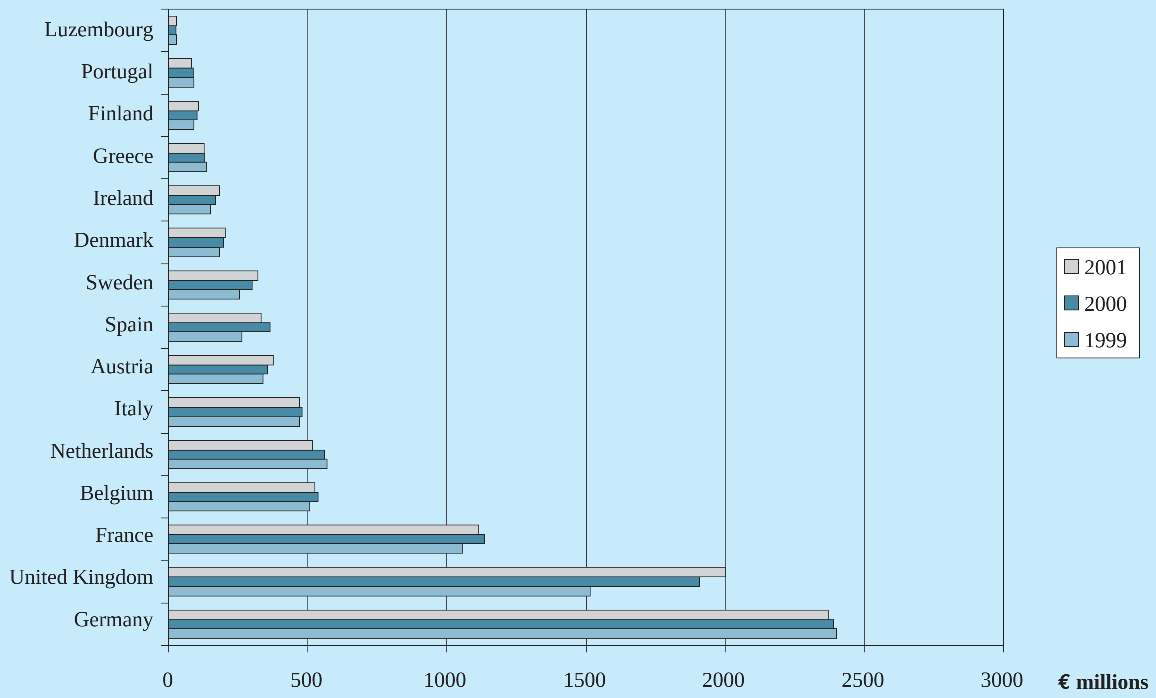


Table 5.1 Imports of household, furnishing and floor-covering textiles into EU in volume and value, 1999-2001	1999		2000		2001	
	'000 tons	**€ millions**	**'000 tons**	**€ millions**	**'000 tons**	**€ millions**
Knotted carpets	62	859	59	870	52	798
Woven carpets	43	109	30	106	28	100
Woven carpets of pile construction	84	501	127	530	130	542
Flat woven carpets	40	165	42	178	43	187
Tufted carpets	553	1,906	539	1,945	519	1,940
Felt carpets	88	226	84	247	81	222
Other carpets	34	162	34	180	36	181
Total floor coverings	**904**	**3,928**	**915**	**4,056**	**889**	**3,970**
Blankets	29	184	30	208	37	235
Bed linen	202	1,479	217	1,665	229	1,713
Bedspreads	19	119	20	135	24	138
Table linen	45	431	45	483	43	450
Bathroom and kitchen linen	153	1039	171	1,214	177	1,175
Total household textiles	**448**	**3,252**	**483**	**3,705**	**510**	**3,711**
Curtains	49	551	57	632	62	681
Other furnishing articles	49	335	44	360	46	410
Total furnishings	**98**	**886**	**101**	**992**	**108**	**1,091**
Total EU imports	**1,450**	**8,066**	**1,499**	**8,753**	**1,507**	**8,772**

Source: Eurostat

Imports of textile floor coverings

Tufted carpets remained the major product group in the EU imports of floor coverings, at distance followed by knotted carpets. The shares in imports from EU countries and developing countries did not change in the period under review. Germany is the leading importer of floor coverings in the EU. Despite a further fall in domestic production, imports decreased in the preceding years caused by a weak domestic consumer market. Total imports in 2001 accounted for 30 percent of EU imports in 2001 (33% in 1999). The second biggest importer is the UK, of which country floor coverings imports increased from 22 percent of EU imports in 1999 to 26 percent in 2001, mainly caused by lower domestic production, intense price competition on retail level and lower import prices stimulated by the development in the local currency. Total imports of the three other major markets (France, The Netherlands and Italy) accounted for 21 percent together in 2001.

Knotted carpets

Around 95 percent of total EU imports of this product group covered carpets of wool or fine animal hair. Imports of knotted carpets decreased in volume (16%) and in value (7%) in the period 1999-2001, which indicates that average import prices grew by 11 percent. The most important product groups are carpets with less than 500 rows per metre of warps and covered 77 percent of total imports in this product group (in terms of value). 88 percent of imports came from developing countries, mainly Asian countries, like Iran, India, Nepal and Pakistan.

Carpets with 350-500 knots of rows per m^2 of warp accounted for 51 percent of value in this product group. Owing to their exclusivity and high cost per square metre, the average import price is much higher than other product groups, such as woven, tuft and needlefelt floor coverings.

More or less the same situation as described under knotted carpets is valid for hand-woven carpets.

63 percent of imports of this product group (including kelims, sumacs etc.) came from developing countries, mainly from India.

Woven piles

Rugs of man-made fibres covered 38 percent of the imported value in 2001; woollen rugs 21 percent; woollen pile carpets covered 16 percent and pile carpets of man-made fibres 13 percent.

76 percent of imports of this product group was intra-EU trade (Belgium accounted for almost half of

Table 5.2 Imports of textile floor covering into the EU by area of origin, 1999-2001

	1999		2000		2001	
	'000 tons	€ millions	'000 tons	€ millions	'000 tons	€ millions
Total	**905**	**3,928**	**915**	**4,056**	**889**	**3,970**
of which from:						
EU countries	700	2,597	701	2,637	671	2,576
Developing countries	151	1,082	153	1,132	156	1,100
Other countries	54	248	61	287	62	294

Source: Eurostat

total imports) in 2001, while 17 percent came from developing countries (mainly India). In 1999 these percentages were respectively 80 and 13 percent.

Flat woven
EU imports of flat woven rugs of vegetable textiles accounted for 51 percent, while carpets of the same materials accounted for 9 percent of this product group. 44 percent of imports of this product group was intra-EU trade (Belgium, The Netherlands and Germany) in 2001, while 48 percent came from Asian developing countries (mainly from India). The same percentages were valid for 1999.

Tufted
EU imports of tufted carpets (in terms of value) can be divided into:
- materials used: 14 percent was made of natural fibres in 2001 (11% in 1999) and 86 percent of man-made fibres (polyamide, polypropylene and other synthetic materials) (89% in 1999);
- and in size: 13 percent was tiles in 2001, while this percentage was 12 percent in 1999.

Within the sector of tufted carpets, it is not possible to make a distinction between broadloom carpet and floor rugs. Average import prices of tufted floor coverings rose 4.2 percent annually in the period 1999-2001. Intra-EU trade dominated in imports of tufted carpets: in 1999 almost 90 percent of total imports came from other EU countries (Belgium, The Netherlands and Germany), while in 2001 this import share had fallen slightly to 88 percent. The role of developing countries (India and China) was limited: 4 percent in 1999 and 5 percent in 2001 and included mainly woollen floor rugs.

Needlefelt
75 percent intra-EU trade (mainly Belgium and The Netherlands) and 21 percent other West-European countries (Switzerland). The role of developing countries remained very limited, only 0.5 percent came from these countries, mainly South Africa.
Import share of tiles is rather limited in EU imports: only 6 percent (in terms of value) in 2001, which was somewhat lower than in previous years.

Other carpets
EU imports of other-than-specified carpets covered the following materials: 12 percent wool; 52 percent man-made fibres and 26 percent vegetable fibres.
54 percent of imports was intra-EU trade (UK and The Netherlands), 31 percent came from developing countries (China and India) and 15 percent came from other countries (USA and Poland).

Competition
Imports in textile floor coverings can be divided into tufted, woven piles and needlefelt sectors with a dominating role for European countries (particularly Belgium) and knotted, hand-woven and flat woven sectors with a dominating role for developing countries, like India, China, Pakistan etc. Import prices of knotted carpets vary from € 30-40 per carpet (for countries of origin like India, China, Afghanistan, Egypt and Tunisia) and € 50-60 per carpet (from Iran, Nepal, Pakistan, Germany and Turkey). Differences are, among other reasons, caused by the materials used, number of knots and exclusivity of design.

Table 5.3 EU leading suppliers of textile floor coverings by product groups in 2001 (million square metres)

	1999	2001	Leading suppliers in 2001: (import share in % between brackets)
Knotted			
- < 350 rows	6.5	6.0	India (53%), Nepal (24%), Morocco (7%), China (4%), Iran (3%).
- 350-500 rows	18.8	6.6	Iran (53%), India (13%), Pakistan (9%), Germany (7%) China (5%).
- > 500 rows	1.5	1.2	Pakistan (50%), India (24%), Iran (6%), China (5%), Nepal (3%).
- other knotted	2.1	3.4	India (18%), China (14%), Egypt (12%), Turkey (10%), Denmark (9%).
Woven			
- hand-woven	5.6	3.5	India (54%), Netherlands (7%), Iran (8%), China (7%), Turkey (4%).
- coir, sisal etc	8.7	7.8	India (55%), Netherlands (14%), Belgium (7%), Italy (5%), Germany (4%).
- pile carpets	15.9	19.3	Belgium (57%), India (9%), Netherlands (7%), Poland (3%), France (3%).
- pile rugs	39.1	43.4	Belgium (55%), Turkey (10%), India (8%), France (5%), Italy (3%).
- flat carpets	5.1	3.8	India (19%), Germany (17%), Belgium (16%), China (10%), Netherlands (8%).
- flat rugs	23.5	25.3	India (53%), Belgium (9%), China (7%), Netherlands (5%), Austria (3%).
Tufted			
-carpets	369.3	429.6	Belgium (39%), Germany (16%), Netherlands (13%), Italy (9%), France (3%).
- tiles	28.8	32.7	Netherlands (39%), Belgium (26%), Germany (9%), USA (9%), UK (6%).
Needlefelt	106.4	102.3	Belgium (64%), Netherlands (12%), Poland (5%), Germany (5%), France (3%).
Other carpets	32.9	28.1	India (19%), France (14%), China (12%), Belgium (8%), Netherlands (7%).
Total imports	**664.2**	**713.0**	**Belgium (40%), Netherlands (12%), Germany (12%), China (7%), Italy (6%).**

Source: Eurostat

Imports of household textiles
Intra-EU trade decreased in favour of imports from developing countries. 51 percent of total EU imports came from developing countries, while this percentage was 48 in 1999. Bed linen and cotton towelling (classified under bathroom and kitchen linen) are the major product groups for EU imports.

Blankets
Around 65 percent of the in total 40 million imported blankets was made of man-made fibres in 2001, which is almost 5 percent higher than in 1999. Average import prices rose from € 6.43 in 1999 per kg to € 6.99 in 2000 and fell to € 6.30 in 2001. Average import prices (per kg.) for woven cotton blankets decreased from € 8.39 in 2000 to 7.47 in 2001, while prices of woven blankets of man-made fibres decreased from € 5.79 in 2000 to 5.31 in 2001. In terms of value, 44 percent of imports of this product group was intra-EU trade (Germany, Italy and Spain) in 2001, while 41 percent came from developing countries. In 1999 these percentages were respectively 52 and 30 percent.

Table 5.4 Imports of household textiles into the EU by area of origin, 1999-2001

	1999		2000		2001	
	‘000 tons	€ millions	‘000 tons	€ millions	‘000 tons	€ millions
Total	**446**	**3,253**	**483**	**3,705**	**510**	**3,711**
of which from:						
EU countries	144	1,259	146	1,386	164	1,354
Developing countries	249	1,576	274	1,847	286	1,889
Other countries	53	418	63	472	60	468

Source: Eurostat

Imports from Mediterranean countries (mainly Turkey) rose from € 8.8 million in 1999 to 12.7 million in 2001 and imports from Asian developing countries (China and India) from € 37.4 in 1999 to € 76.3 in 2001.

Bed linen

Almost 81 percent of imported bed linen was cotton-made in 2001 (in terms of weight). 36 percent of total imports of bed linen concerned printed, woven cotton bed linen; non-printed woven cotton bed linen 26 percent and knitted bed linen 18 percent.
These percentages remained rather stable during the period under review and even in some years before.
Developments in imports into the EU in the period under review were:

- knitted bed linen, mainly made of cotton increased (12% in the period 1999-2001), while average prices stayed flat in the same period at € 6.77 per kg.
- printed bed linen of woven cotton increased in volume (11%) and value (16%) in the period 1999-2001. Average import prices showed a growth of 4.5 percent in the period mentioned, of which 3.3 percent in 2000-2001, and stayed during the period 1996-2000 around the level of € 7.65 per kg.
- non-printed woven bed linen increased in volume from 65,200 tons in 1999 to 75,600 tons in 2001 (+16%) and in value from € 482 million in 1999 to € 564 million in 2001 (+17%), of which almost 80 percent was cotton-made. Average import prices grew less than 1 percent in the period under review.

The import share of other EU countries for bed linen (35% in 2001) is lower than for blankets. Intra-EU trade came mainly from Portugal, France, Germany and Italy. 13 percent of EU imports came from Central and East European countries (CEECs), like Poland, Romania and the Czech Republic and almost 50 percent came from developing countries, of which Asian developing countries (Pakistan at a distance followed by India and China) supplied 31 percent and Mediterranean countries (Turkey) 17 percent.
These import shares per area and countries of origin were more or less the same as in 1999.
Average import prices varied strongly between those leading exporters of bed linen. Average import price per kg. from France amounted to € 12.18 in 2001 (12.60 in 1999); from Poland around € 8.96 (8.85 in 1999); from Turkey € 7.57 (7.60 in 1999) and from the leading exporter to the EU: Pakistan € 5.80 (5.65 in 1999).

Bedspreads

Imported bedspreads were mainly (70%) made of woven cotton, of which imports grew from 13,200 tons in 1998 to 18,900 tons in 2001. Average import prices of woven cotton bedspreads increased in 2000 to € 6.28 and fell in 2001 to € 6.03, caused by lower import prices from Portugal. Developments in imports of bedspreads were similar to developments in imports of woven cotton bedspreads.
EU imports of bedspreads came for 60 percent from developing countries (India and China) and 36 percent was intra-EU trade (Portugal, Spain and Belgium) in the period under review. India remained the leading supplier: 10.5 million bedspreads with an average price of € 5.51 (in 1999: 8.8 million units at € 5.59), followed by Portugal 1.3 million spreads with an average import price of € 12.05 (in 1999 respectively 1.5 million and € 11.32) and China with 2.4 million bedspreads and an average price of € 5.21 (1999: 1.6 million and a higher price of € 5.73). Other important suppliers from the EU were Spain and, from outside the EU, Turkey and Poland.

Table linen

The share of cotton woven table linen in EU imports accounted for 54 percent in 2001 and for woven synthetic table linen 27 percent; in 1999 these percentages were respectively 60 and 21 percent.
Developments in import prices of table linen were similar to developments in import prices of woven cotton table linen: a growth of 11 percent in 2000 was followed by a fall of 3 percent in 2001. Import prices of woven cotton table linen rose from € 8.46 per kg in 1999 to € 9.17 in 2001. Import prices of synthetic woven table linen fell from € 14.03 in 1999 to € 13.63 in 2001.
The role of developing countries in total EU imports of table linen grew from 51 percent in 1999 to 56 percent in 2001, while imports from other EU countries (Germany, Belgium and Italy) stabilized around 30 percent. The two leading exporters to the EU (China and India) increased their share to 40 percent of total EU imports in the period 1999-2001.
China exported cotton and synthetic table linen and India mainly cotton. Other suppliers from outside the EU were: Turkey (€ 29 million in 2001), the Czech Republic (€ 23 million in 2001), Poland (€ 16 million in 2001), Egypt (€ 9 million in 2001) and Pakistan (€ 7 million in 2001). Imports from all these countries from outside the EU increased in the period under review, while imports from Turkey, Poland and Pakistan slightly decreased.

Bath and kitchen linen

Over 144 thousand tons of cotton towelling were imported into the EU, at an average price around € 6.72 per kg in 2001. In 1999 average import prices were higher, namely € 7.04 per kg. Woven towels (mainly for kitchen purposes) were for 75-80 percent cotton-made in 1999-2001.
Cotton towelling was for 38 percent intra-EU trade of which 43 percent came from Portugal (€ 146 million in 2001 and 164 million in 1999). Another important exporter to other EU countries was Belgium with

€ 95 million (92 million in 1999). About 54 percent of cotton towelling imports came from developing countries as opposed to 50 percent in 1999.
Suppliers from outside the EU were in 2001: Turkey (€ 210 million; € 175 million in 1999), Pakistan (€ 58 million in 2001 and € 52 million in 1999), India (€ 54 million in 2001 and € 47 million in 1999), China (rose from € 35 million in 1999 to € 52 million in 2001), Brazil (decreased from € 38 million in 1999 to € 36 million in 2001), Egypt (stabilized at about € 25 million), Czech Republic (from € 10 to 11 million), Colombia (rose from € 12 to 13 million), Indonesia (fell from € 15 million to 10 million), Bangladesh (rose from € 6 million to 10 million).
Woven bath and kitchen linen was for 33 percent intra-EU trade with the major suppliers Belgium and Portugal, however, imports from both countries decreased considerably.
Half of total EU imports came from developing countries. The leading supplying country from outside the EU became Turkey with € 26 million in 2001 (€ 18 million in 1999), followed by the former leading supplier Pakistan (stabilized at about € 22 million), India (fell from € 13 million to € 12 million), Egypt (stabilized at about € 11 million) and China (fell from € 12 to € 10 million).

Imports of furnishings
Curtains remained the major product group in the EU imports of furnishings, with a rather stable import share of 62 percent. The balance in shares in imports from EU countries and developing countries changed in favour of developing countries. The import share of the latter increased from 41 percent in 1999 to 48 percent in 2001.

Curtains
Total imports of curtains grew in terms of volume by 26 percent during the period 1999-2001. Average import prices fell 1.8 percent in the same period.
Imported curtains concerned 81 percent woven, 17 percent knitted and 2 percent non-woven synthetics, while the materials used were cotton (43% in 2001) and synthetics (49% in 2001), while these percentages were respectively 47 and 46 in 1999.
Curtains came for 37 percent (in value) from other EU countries, mainly from Germany at a distance followed by Denmark, Italy, Belgium, France and The Netherlands. All these countries exported curtains with a value of more than € 20 million each. 16 percent came from CEECs (Czech Republic and Poland) and almost 42 percent came from developing countries, of which more than 70 percent from Asian developing countries (India, Pakistan and China) and 27 percent from Mediterranean countries (Turkey).
Exports from India increased considerably from € 59 million in 1999 to € 82 million in 2001, just like exports from Turkey (from € 48 to 62 million), Pakistan (from € 51 to 54 million), Poland (from € 25 to 35 million), Czech Republic (from € 26 to 36 million) and China (from € 17 to 31 million).

Other furnishing articles
Imports of furnishing articles, other than curtains, were mostly (89% during the whole period 1999-2001) woven and made of cotton (an unchanged 40%) or made of synthetics (26% in 1999 and 32% in 2001).
Average import prices of woven furnishings made of synthetic fibres came in 2001 to the same level as in 1999: € 8.39 per kg. Import prices of cotton furnishings rose considerably: from € 4.55 in 1999 to € 6.83 in 2000 and to € 8.09 in 2001 per kg.
Asian developing countries accounted for 46 percent of EU imports in this product group in 2001; intra-EU trade was 31 percent; 10 percent came from CEECs and from Mediterranean countries. India remained the leading supplier with € 83 million, followed by China € 74 million), Germany, Poland, Tunisia, Turkey, Belgium and Italy. Except for exports from Turkey and Italy, exports rose from all the countries mentioned.

Competition
With regard to factors like cost levels and distances, the following competitive categories in household and furnishing textiles can be distinguished:

Table 5.5 Imports of furnishing textiles into the EU by area of origin, 1999-2001

	1999		2000		2001	
	'000 tons	€ millions	'000 tons	€ millions	'000 tons	€ millions
Total	**99**	**886**	**102**	**993**	**109**	**1,091**
of which from:						
EU countries	40	367	29	340	29	380
Developing countries	41	365	52	462	59	520
Other countries	18	154	21	191	21	191

Low-cost, long-distance countries: this category of countries specialises in low-priced, high-volume, fashionable and standard types of products with a fair quality. These products are mainly made to buyers' specifications in countries in South-East Asia (Pakistan, India and Bangladesh), the Far East (China), North Africa (Egypt) and South America (Brazil and Colombia).
Medium-cost, medium-distance countries: these countries supply medium-fashionable products. It concerns Turkey, Portugal and CEECs , like Poland, Czech Republic, Romania, Bulgaria and Estonia.
High-cost countries: these countries supply quality fashion characterised by frequent deliveries, small quantities and sophisticated fabrics, which are difficult to obtain in low-cost countries. Western Europe (Germany, Belgium, France, Italy and The Netherlands), the USA and Israel belong to this category.

5.2 Imports of household, furnishing and floor-covering textiles by major EU countries

Germany

Total German imports of floor coverings, household and furnishing textiles decreased in volume (10.5 percent in 1999-2001) and in value (1.1 percent in the same period), which indicates fewer imports against higher prices. In particular, import prices of floor coverings increased. The average price per kg was € 4.04 in 1999 but rose to € 4.51 in 2001, mainly caused by developments like the weak domestic consumer market and the intensive competition.
Imports of household textiles grew in 2000 (around 7 percent in value and in volume) and stabilized in 2001. Imports of furnishing textiles stabilized in volume, while average import prices increased from € 10.18 in 1999 to € 11.13 in 2001.

Imports of textile floor coverings

Belgium is the dominant supplier of textile floor coverings especially in woven piles, tufted and needlefelt carpets and accounted for 49 percent of total carpets imports into Germany. The Netherlands ranked second in importance followed at a distance by India and Austria. India is the key supplier of knotted carpets, hand-woven carpets and woven (pile and flat woven) rugs in natural fibres, cotton and wool. Many differences are valid for the countries of origin in the product categories distinguished as will be discussed below.
German imports of **knotted carpets** accounted for 57 percent (in value) of total EU imports of this product group and came almost completely from developing countries, mainly in Asia and North Africa.
Imported knotted carpets can be classified as follows:

Table 5.6 Imports of household, furnishing and floor-covering textiles into Germany in volume and value, 1999-2001

	1999		2000		2001	
	'000 tons	€ millions	'000 tons	€ millions	'000 tons	€ millions
Floor coverings	319	1,288	282	1,199	261	1,177
Household textiles	116	887	125	946	125	937
Furnishing textiles (incl. bedspreads)	22	224	23	244	23	256
Total imports	**457**	**2,399**	**430**	**2,389**	**409**	**2,370**
of which from:						
Other EU countries	273	906	234	767	214	752
Developing countries	140	1,134	141	1,204	137	1,174
Other countries	44	359	55	418	58	444

Source: Eurostat

	1999		2001	
	mln m^2	Average import price per m^2 in €	mln m2	Average import price per m^2 in €
Wool; up to 350 rows *)	4.5	33.45	4.2	29.57
Wool; 350-500 rows	3.4	72.84	3.2	78.16
Wool; more than 500 rows	0.5	78.78	0.4	81.06
Other knotted carpets	0.3	161.28	0.2	223.63
Total	**8.7**	**55.14**	**8.0**	**56.81**

*) of knots per metre of warp

The category 'other knotted carpets' includes silken carpets, which explains the very high import price. Imports of all categories distinguished decreased in the period under review.
Total German imports of **woven floor coverings** decreased in volume and in value in the period 1999-2001. The major product items pile and flat woven rugs increased in terms of volume caused by cheap imports from India, China and Pakistan.
Imports of woven floor coverings can be classified as below:

Almost 141 million square metres of **tufted** carpets were imported into Germany in 2001, of which 2 percent tiles. Non-printed carpets of man-made fibres (including nylon or other polyamides) were the major product groups. The average import price of tufted carpets was € 3.24 per square metre in 2001, which was much lower than in 1999: € 4.53.
Imports of needlefelt floor coverings decreased too: from 29.8 m^2 with an average price of € 2.59 in 1999 to 28.1 m^2 with an average price of € 2.87 in 2001. Imports of tiles accounted for less than 1 percent in the felt sector.

Imports of household textiles
The major product groups of household textiles are bed linen, bathroom & kitchen linen and table linen.
Imports of bed linen rose from € 425 million in 1999 to € 453 million in 2001 (48% of total household textiles imports), of which 92 percent was cotton-made.
Imports of bathroom and kitchen linen grew 5 percent in the period under review: from € 243 million in 1999 to € 256 million in 2001, of which 84 percent was cotton towelling. Woven linen mainly consisted of cotton (57% in value), cotton/flax blends (12%), flax (12%) and synthetics (10%).
Imports of table linen stabilized at around € 154 million, of which 42 percent was cotton-made and 45 percent was made of synthetic fibres in 2001.
The following developments in German imports of household textiles can be noted:

	1999		2001	
	mln m^2	Average import price per m^2 in €	mln m^2	Average import price per m^2 in €
Hand-woven: kelims etc.	0.6	15.33	0.5	17.69
Coir, sisal etc.	1.5	6.65	1.2	6.70
Pile carpet	1.3	13.92	1.0	16.52
Pile rugs	7.2	9.78	7.7	8.93
Flat woven carpets	1.8	6.48	1.1	7.46
Flat woven rugs	6.0	5.97	6.5	6.11
Total	**18.4**	**8.49**	**18.0**	**8.35**

Table 5.7 Leading suppliers of textile floor coverings to Germany for product groups in 2001 (million square metres)

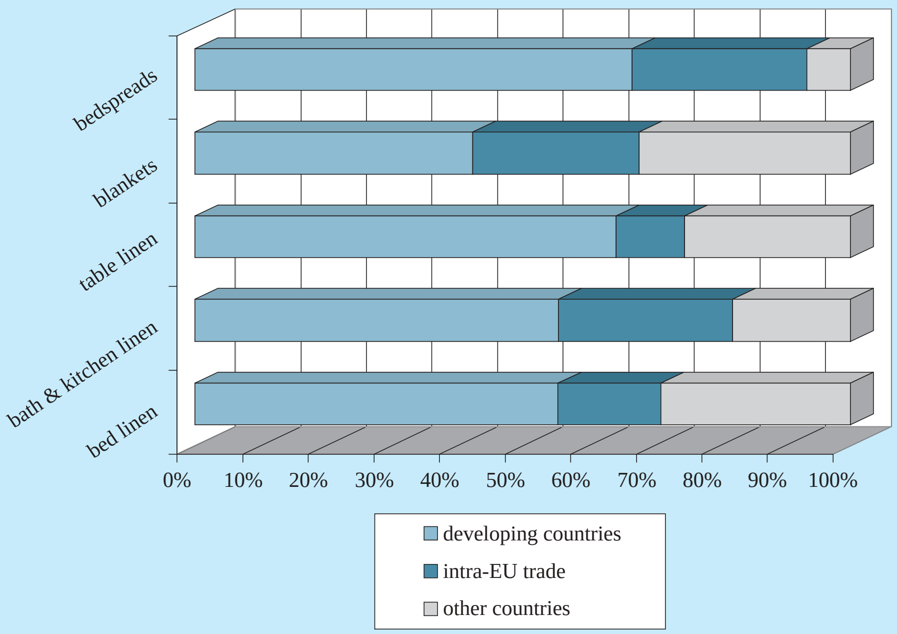
	1999	2001	Leading suppliers in 2001: (import share in % between brackets)
Knotted	8.7	8.0	India (41%), Iran (24%), Nepal (17%), Pakistan (5%), Morocco (4%).
Hand-woven	2.1	1.7	India (51%), Sri Lanka (10%), Iran (8%), Netherlands (7%), Switzerland (5%)
Woven pile	8.5	8.7	Belgium (60%), India (8%), Czech Republic (6%), Netherlands (6%), Turkey (4%)
Flat woven	7.8	7.6	India (48%), China (9%), Belgium (9%), Netherlands (8%), Egypt (6%)
Tufted	119.2	98.3	Belgium (59%), Netherlands (27%) , Austria (4%), Czech Rep. (3%)
Needlefelt	29.8	28.1	Belgium (57%), Netherlands (25%), Switzerland (10%), France (2%), Austria (2%)
Other carpets	3.2	3.5	Belgium (29%), Poland (13%), Netherlands (11%), China (11%), France (7%)
Total imports	**179.3**	**155.9**	**Belgium (49%), Netherlands (23%), India (6%), Austria (3%)**

Source: Eurostat

- imports of blankets and bedspreads were limited, at respectively 6 and less than 2 percent of household textiles imports;
- developing countries play an important role in German imports of household and furnishing textiles: 56 percent of total imports came from these countries;
- the role of other EU countries decreased from 23 percent in 1999 to 19 percent in 2001, while imports from other industrialized countries showed the biggest growth in the period 1999-2001 from 21 percent in 1999 to 25 in 2001;
- imports from ACP countries decreased considerably in the period under review, from almost € 1.0 million in 1999 to 0.5 million in 2001. Around 70 percent of imports from these countries was imports of cotton towelling, mainly from Sudan and Central Africa and 20 percent woven cotton table linen, mainly from Madagascar and Ethiopia.

Figure 5.2 gives an overview of the area of origin for the product groups under review in 2001.

Figure 5.2 German imports of household textiles by area of origin (in%), 2001



Germany imported 8.8 million **blankets** in 2001 with an average import price of € 6.67. The leading suppliers were China (19% of total volume with an average price of € 3.89), Turkey (respectively 13% and € 5.24) and Poland (9% and € 5.22). Other suppliers were Italy, Czech Republic, Hungary, Croatia, India and Slovenia.
Turkey remained by far the leading exporter of **bed linen** to Germany, with total exports of over € 125 million or 28 percent of total imports in 2001. In the major product groups knitted cotton, printed woven cotton and non-printed woven cotton bed linen, this country is the leading exporter. Poland is the second supplier to Germany with € 60.4 million in 2001 (13%), followed by Pakistan (almost 13%), India (10%), Greece (6%), Romania (6%), Czech Republic (4%) and France (2%). Average import prices for woven cotton bed linen printed were € 7.44 per kg, of which the three major suppliers showed prices of € 8.59 (Turkey), € 8.25 (Poland) and € 7.33 (Pakistan). The average import price for non-printed cotton linen was € 6.61 and 7.06 for imports from Turkey.
India was by far the leading exporter of **bedspreads** to Germany with 1.175 million units or 61 percent of total imports in 2001 and an average price of € 6.60 per unit, which is below the total average of € 8.05.
China is the leading exporter of woven synthetic **table linen** with an import share in terms of value of 65 percent in 2001, while the Czech Republic is the leading exporter of woven cotton table linen (import share of 23 percent). Other important suppliers to the German market for woven synthetic table linen were Turkey (14%), Czech Republic (6%) and Poland (4%). Imports of cotton table linen came, besides from the Czech Republic from India (21%), China (14%) and Turkey (5%).
The leading supplier of cotton **towelling** remained Turkey with 8,600 tons in 2001 at an average kilogram/price of € 7.24, followed by Pakistan (2,860 tons at € 4.79), Belgium (2,530 tons at € 8.79), Czech Republic (2,030 tons at € 8.89 and Portugal (1,995 tons at € 8.89). Significant other suppliers from outside the EU were: China, Brazil, India, Latvia and Colombia.
Woven cotton **bathroom and kitchen linen** came for 27 percent (in terms of volume) from Pakistan in 2001 with an average import price of € 3.62, which is far below the average price of total imports (€ 6.12 per kg). Imports from Turkey amounted to 600 tons (€ 7.63 per kg), Egypt to almost 500 tons (€ 5.96 per kg) and Finland to 338 tons (€ 6.74 per kg).

Imports of furnishing textiles
Imports of curtains increased because two of the three leading product groups increased namely knitted and woven synthetic curtains. Imports of the remaining major group (woven cotton curtains) decreased. Together these product groups accounted for 89 percent of imports of curtains in 2001.
Knitted synthetic curtains came for 51 percent from the Czech Republic, woven cotton curtains came mainly from India (31%) and woven synthetic curtains came from Turkey (20%), Czech Republic (12%) and China (11%). These four countries accounted for almost 50 percent of total imports in terms of value.
Other furnishing textiles came mainly from India, China, Czech Republic, Poland and Turkey in 2001.

UK

Total imports of household, furnishing and floor-covering textiles into the UK increased strongly in the period 1999-2001, 8 percent in volume yearly and 14 percent in value, which indicates higher average import prices. Imports from developing countries showed the biggest growth, mainly in the product groups household and furnishing textiles.

Table 5.8 Imports of household, furnishing and floor-covering textiles into UK, 1999-2001

	1999		2000		2001	
	'000 tons	€ millions	'000 tons	€ millions	'000 tons	€ millions
Floor coverings	302	847	353	996	355	1,042
Household textiles	83	528	85	656	101	698
Furnishing textiles (incl. bedspreads)	31	141	22	176	25	207
Total imports	**416**	**1,516**	**460**	**1,828**	**481**	**1,947**
of which from:						
Other EU countries	309	875	340	1,040	339	1,056
Developing countries	85	522	98	658	120	756
Other countries	22	119	22	130	22	135

Source: Eurostat

	1999		2001	
	‘000 m^2	Average import price per m^2 in €	‘000 m^2	Average import price per m^2 in €
Wool; up to 350 rows *)	463	31.57	366	47.72
Wool; 350-500 rows	740	43.46	575	44.98
Wool; more than 500 rows	147	59.58	137	59.19
Other knotted carpets	315	18.97	831	12.57
Total	**1,665**	**36.93**	**1,909**	**32.41**

*) rows of knots per metre of warp

Imports of textile floor coverings
Just like in Germany, Belgium is also the dominant supplier to the UK of textile floor coverings.
The Netherlands ranked second far behind Belgium and is at distance followed by India. The role of developing countries in the UK’s imports of textile floor coverings is rather limited, as can be derived from table 5.8.
In terms of value, 70 percent of imports of knotted and hand-woven carpets came from developing countries, but imports of tufted carpets came for less than 4 percent from developing countries.
Belgium is the leading supplier of woven piles, tufted and needlefelt floor coverings and India the main supplier of hand-woven carpets and flat woven rugs.

UK imported value of **knotted carpets** accounted for 8 percent of total EU imports of this product group and came almost completely from Asian developing countries, like China, India, Pakistan and Iran.
Imported knotted carpets can be classified as above:

UK imports of **woven floor coverings** decreased in volume and in value in the period 1999-2001.
The major product items, pile and flat woven rugs, increased in terms of volume caused by cheap imports from India, China and Pakistan.
Imports of woven floor coverings can be classified as below:

Imports of tufted carpets increased from 105 million square metres in 1999 to 133 million in 2001, of which 8 percent tiles. Carpets of polypropylene and woollen carpets were the major product groups. The average import price of tufted carpets was € 5.29 per square metre in 2001, which was somewhat higher than in 1999: € 5.23. Almost 90 percent of tufted floor coverings came from other EU countries in terms of value and only 4 percent from developing countries, mainly woollen tufted rugs from China and India.
Imports of needlefelt floor coverings increased too, but to a much smaller degree: from 18.1 million m^2 with an average price of € 2.05 in 1999 to 19.5 m^2 with an average price of € 1.90 in 2001. Imports of tiles accounted for 3.3 percent in the felt sector.
Developing countries, mainly South Africa, exported only 1.3 percent in terms of value in this sector to the UK.

	1999		2001	
	mln m^2	Average import price per m^2 in €	mln m^2	Average import price per m^2 in €
Hand-woven: kelims etc.	1.4	7.32	0.9	12.00
Coir, sisal etc.	2.3	3.82	2.3	4.60
Pile carpet	7.0	7.95	11.5	6.67
Pile rugs	12.0	7.47	11.9	8.51
Flat woven carpets	0.7	3.92	0.6	3.82
Flat woven rugs	3.3	5.06	3.0	6.45
Total	**26.7**	**6.88**	**30.3**	**7.32**

Table 5.9	Leading (5) suppliers of textile floor coverings to the UK for product groups in 2001 (million square metres)		
	1999	**2001**	**Five leading suppliers in 2001:** (import share in % between brackets)
Knotted	1.6	1.9	China (24%), India (20%), Pakistan (11%), Iran (9%), USA (8%)
Hand-woven	3.7	3.2	India (64%), Netherlands (18%), Belgium (7%), China (3%), Vietnam (3%)
Woven pile	19.0	23.3	Belgium (72%), India (8%), France (4%), Portugal (4%), Netherlands (2%)
Flat woven	4.0	3.6	India (61%), Belgium (22%), Netherlands (7%), China (2%), Greece (1%)
Tufted	104.6	132.7	Belgium (63%), Netherlands (15%), USA (5%), Germany (4%), France (4%)
Needlefelts	18.1	19.5	Belgium (80%), Netherlands (11%), France (5%), Italy (1%), South Africa (1%)
Other carpets	5.9	6.3	India (37%), France (26%), USA (12%), Netherlands (7%), China (3%)
Total imports	**156.9**	**190.5**	**Belgium (61%), Netherlands (13%), India (5%), France (5%), USA (4%)**

Source: Eurostat

Household textiles
The imported value of household textiles into the UK came for 66 percent from developing countries in 2001, of which Turkey, Pakistan, India, China and Bangladesh were the leading trade partners. The role of developing countries in UK imports was 58 percent in value in 1999. Most imports came from Asian developing countries as mentioned above and from Mediterranean countries (Egypt and Turkey). The role of ACP countries decreased in 2001 to € 0.5 million, with imports mainly originating in Zimbabwe.
Blankets came from China and India, followed by some EU countries (Portugal, Italy and Germany). The leading supplier was China with 2 million blankets (30% of total imports) with an average price of € 3.82 in 2001, followed by India 1.1 million blankets (€ 4.99), Portugal 0.7 million (€ 6.45) and Italy 0.6 million (€ 7.58).
In the product group bed linen, the role of cotton with 50 percent (in terms of value) of total imports was less important than in other major product groups. Import of bed linen made of synthetic fibres accounted for 45 percent of total imports in 2001.
Pakistan is the leading exporter of **bed linen** to the UK with total exports of € 94 million or 27 percent of total imports in 2001. Almost 40 percent of imports of printed woven synthetic bed linen came from this country. Pakistan was followed by Portugal (20% of total imports), China (12%), Turkey (8%) and Bangladesh (6%). France is the second supplier to the UK from inside the EU with € 11 million in 2001, behind Israel, India and Egypt. Average import prices were € 7.41 per kg. The two major suppliers showed prices of € 6.23 (Pakistan) and € 8.75 (Portugal).
UK imports of bedspreads accounted for 24 percent (in value) of total EU imports, of which two thirds were woven cotton spreads. India was the leading exporter of **bedspreads** to the UK with almost 4,000 tons or 70 percent of total imports in 2001 with an average price of € 4.45 per kg, followed at a distance by China, Turkey and Portugal.
The product group woven table linen of cotton accounted for 59 percent of total imports of table linen in 2001. Imports of table linen decreased considerably in volume, while average prices of table linen increased considerably (12%).
Egypt is the leading exporter of **table linen** to the UK with an import share in terms of volume of 28 percent in 2001, followed by India (19%) and China (10%). Other suppliers were Turkey 285 tons , Poland 192 tons and Taiwan 190 tons. Average import prices per kg varied from € 6.07 (Egypt) to € 8.04 (Turkey) and to € 10.35 (India).
Imports of cotton products dominated in the product group bathroom and kitchen linen and accounted for 95 percent. 70 percent of total imports in this product group came from developing countries in 2001.
The leading supplier of cotton **towelling** was Turkey with 8,876 tons or 30 percent of total imports in 2001 with an average kilogram/ price of € 7.37, followed by Portugal (5,056 tons at € 7.58) and India (6,678 tons at € 4.97). Significant others from outside the EU were: China (1,236 tons at € 8.40), Pakistan (1,972 tons at € 4.96), Bangladesh (1,643 tons at € 4.68), Israel (785 tons at € 8.77), Egypt (663 tons at € 9.36) and Colombia (718 tons at € 7.56).
Woven cotton **bathroom and kitchen linen** came for 40 percent (in terms of volume) from Turkey in 2001: 2,552 tons with an average import price of € 5.22 per kg, India 826 tons (€ 4.87 per kg), Pakistan 667 tons (€ 3.57 per kg), Egypt 478 tons (€ 8.72 per kg) and Portugal 448 tons (€ 7.48 per kg).

Furnishing textiles
Imports of curtains increased because the two major product groups increased namely woven curtains of

Table 5.10 Imports of household, furnishing and floor-covering textiles into France by product groups and by area of origin, 1999-2001

	1999		2000		2001	
	'000 tons	€ millions	'000 tons	€ millions	'000 tons	€ millions
Floor coverings	111	375	115	400	100	373
Household textiles	71	527	76	588	75	584
Furnishing textiles	12	115	15	148	16	159
Total imports	**194**	**1,017**	**206**	**1,136**	**191**	**1,116**
of which from:						
Other EU countries	139	640	142	671	128	651
Developing countries	48	329	55	405	53	407
Other countries	7	48	9	60	10	58

Source: Eurostat

cotton and of synthetic fibres. Together these two groups accounted for 80 percent of total imports of curtains. Imports of curtains into the UK came for 75% from developing countries, of which Pakistan, India, Turkey, China and Bangladesh were the leading trade partners. The role of developing countries in UK imports rose to around 80 percent in volume and 70 percent in value, while average import prices from these countries increased.
Curtains came for 40 percent from Pakistan (in total 6,992 tons with average prices for woven cotton of € 6.14 and for woven synthetic curtains of € 6.36 per kg), India (2,504 tons, mainly cotton at € 8.60 per kg), Turkey (1,371 tons, mainly made of synthetic at € 11.57 per kg), China (1,031 tons at € 9.05 per kg.) and Bangladesh (1,3231 tons, mainly cotton at € 6.49 per kg).
Other furnishing textiles came mainly from India (46% in terms of volume) and China (29%) in 2001.

France

Total imports of household, furnishing and floor-covering textiles into France fluctuated in the period 1999-2001: increased in volume (6%) and in value (12%) in 2000 followed by a fall of respectively 7 and 2 percent in 2001, which indicates a growth of average import prices.
Imports came mainly (58 percent in value in 2001) but to a decreasing degree from other EU countries, of which Belgium, Portugal and Italy were the leading trade partners.
The role of developing countries in French imports increased from 32 percent in value in 1999 to 36 percent in 2001, while average import prices from these countries increased strongly from € 6.85 to € 7.63.
Most imports came from Asian developing countries (Pakistan, India and China) and Mediterranean countries (Turkey, Tunisia and Egypt). The role of ACP countries decreased and amounted to € 1.9 million (Madagascar and Mauritius) in 2001.

Imports of textile floor coverings
Belgium remained the leading supplier of textile floor coverings to France, followed by The Netherlands, Italy and India. The role of developing countries in French imports increased from 17 percent in value in 1999 to 19 percent in 2001, while average import prices from these countries increased strongly from € 6.53 to € 7.85. In terms of value, 72 percent of imports of knotted and hand-woven carpets came from developing countries, but imports of the other product groups came in total 9 percent from these countries.
Belgium was the leading supplier in woven piles, tufted and needlefelt floor coverings and India in hand-woven carpets and flat woven rugs, while re-exports from Denmark made this country the leading supplier of knotted carpets to France.
French imports of **knotted carpets** came mainly from Asian developing countries, like China, India, Pakistan and Iran. In 2001, 1.5 million square metres of knotted carpets were imported by France, of which 32 percent were woollen knotted carpets with 350-500 rows (average import price: € 44.74) and 16 percent with more than 500 rows (average import price € 46.67).
French imports of **woven floor coverings** decreased in volume and in value in the period 1999-2001.
Imports of major product items, like pile rugs, pile carpets and flat woven rugs increased in terms of volume, while imports of the other items decreased.
Imports of woven floor coverings can be classified as follows:

	1999		2001	
	mln m²	Average import price per m² in €	mln m²	Average import price per m² in €
Hand-woven: kelims etc.;	0.5	12.94	0.2	20.36
Coir, sisal etc.	1.3	49.18	1.2	53.34
Pile carpet	2.5	10.07	1.5	13.69
Pile rugs	4.5	9.74	5.2	8.77
Flat woven carpets	0.7	7.42	0.4	8.69
Flat woven rugs	2.5	6.03	2.9	6.16
Total	**12.0**	**8.48**	**11.4**	**8.53**

Table 5.11 Leading (5) suppliers of textile floor coverings to France for product groups in 2001
(million square metres)

	1999	2001	Five leading suppliers in 2001: (import share in % between brackets)
Knotted	1.3	1.5	Denmark (20%), Iran (20%), Pakistan (18%), India (11%), Germany (8%)
Hand-woven	1.8	1.4	India (29%), Netherlands (26%), Italy (15%), Belgium (14%), Germany (6%)
Woven pile	6.9	6.6	Belgium (68%), Italy (13%), India (5%), UK (4%), Germany (4%)
Flat woven	3.3	3.3	India (41%), Belgium (21%), Italy (8%), Netherlands (7%), Germany (6%)
Tufted	31.8	29.0	Belgium (60%), Netherlands (21%), Italy (4%), Germany (4%), UK (3%)
Needlefelts	16.5	17.7	Belgium (84%), Italy (7%), Spain (3%), Netherlands (3%), Germany (1%)
Other carpets	5.0	3.9	India (17%), Belgium (15%), UK (10%), Germany (10%), China (9%)
Total imports	**66.6**	**63.4**	**Belgium (60%), Netherlands (12%), Italy (7%), India (5%), Germany (4%)**

Source: Eurostat

Imports of tufted carpets decreased from 31.8 million square metres in 1999 to 29.0 million in 2001, of which only 1 percent tiles. Non-printed nylon carpets were the major imported products. The average import price of tufted carpets was € 5.91 per square metre in 2001, which was much higher than in 1999: € 5.55. 92 percent of tufted floor coverings came from other EU countries in terms of value and only 6 percent from developing countries, mainly woollen tufted carpets from India and China.
However, imports of needlefelt floor coverings increased: from 16.5 million m? with an average price of € 1.49 in 1999 to 17.7 million m? with an average price of € 1.42 in 2001. Imports of tiles accounted for 6 percent in the felt sector. Developing countries exported only 0.5 percent in terms of value in this sector to France.

Household textiles
Synthetic blankets accounted for 56 percent of the total value of French imports. A decreasing part of imported blankets (but still 52% in volume and 60% in value came from other EU countries: Belgium 1.2 million blankets, Spain 0.9 million and Italy 0.6 million). China remained the leading supplier: 1.8 million blankets with an average price of € 4.21 in 2001. Other suppliers from outside the EU were India and Taiwan.
The share of cotton products in imports of bed linen stabilized at about 80 percent. Pakistan is by far the leading exporter of **bed linen** to France, with total exports of € 59.7 million or 24 percent of total imports in 2001. Around 30 percent of imports of printed woven cotton bed linen came from this country. Turkey is the second supplier to France with € 30.6 million in 2001 and was followed by EU partners Portugal, Italy and Belgium. 52 percent of imported bed linen came from developing countries. Average import prices were € 7.54 per kg, of which two major suppliers showed prices of € 6.64 (Pakistan) and € 8.73 (Turkey).

India was the leading exporter of **bedspreads** to France with 1.2 million units or 33 percent of total imports in 2001 with an average price of € 7.58 per unit, followed by China and EU countries Portugal, Belgium, Spain and Italy.
India is also the leading exporter of **table linen** to France with 1,287 tons (20% of total imports in 2001) with an average import price of € 9.11. Other important suppliers to the French market were Belgium (16%), Turkey and Portugal (each 11%). Other major suppliers from outside the EU were China (7%) and Tunisia (6%). Other average import prices varied from € 7.84 (Turkey) and € 7.90 (Portugal) to € 13.27 (Belgium) and € 15.41 (Italy). 70 percent of imported table linen was cotton made.
This percentage was much higher for imports of the product group bathroom and kitchen linen, namely 97 percent. The leading supplier of cotton **towelling** remained EU partner Belgium with 7,637 tons in 2001 with an average kilogram/price of € 8.08, followed by Turkey (4,143 tons at € 7.42) and Portugal (3,313 tons at € 8.96). Significant others from outside the EU were: Pakistan, India, China and Brazil.
Woven cotton **bathroom and kitchen linen** came for 31 percent (in terms of volume) from Belgium in 2001 with an average import price of € 6.31 per kg.
Imports from outside the EU came from Pakistan and amounted to 480 tons (€ 3.69 per kg), India 466 tons (€ 4.68 per kg) and Turkey 366 tons (€ 8.20 per kg).

Furnishing textiles

Curtains came from India (1,486 tons or 21% of total imports, mainly cotton woven at € 10.00 per kg), Belgium (847 tons of woven synthetic and cotton), Turkey (690 tons woven synthetic and cotton), Poland (657 tons, mainly knitted synthetic curtains at € 8.25 per kg) in 2001. Other furnishing textiles came mainly from Poland (23% of total imports and mainly woven synthetic furnishings), Tunisia (11%, synthetic and cotton), Belgium (10% synthetic and cotton) and India (10%, mainly cotton) in 2001.

The Netherlands

The imports of household, furnishing and floor-covering textiles into The Netherlands amount to more than the national consumption. A major part of imports is re-exported to other member countries of the EU, mainly Germany and Belgium. The weak position of the consumer market in the neighbouring countries, in particular Germany, led to a fall in imports into The Netherlands.
Imports of floor coverings decreased 17 percent in terms of value in the period 1999-2001, but against much lower average prices in 2001 than in the previous years. The fall in import prices was the result of an increased competition between imports from other EU countries and lower-cost countries.
Imports of household textiles stabilized more or less in terms of volume, while average import prices rose slightly in 2000 and fell in 2001 to the same level as in 1999.
Imports of furnishing textiles increased in the period under review, however, this product group is much smaller than the other product groups mentioned.
Imports from other EU countries decreased considerably in favour of imports from developing countries; the import value of the latter grew from 33 percent in 1999 to 40 percent in 2001.

Table 5.12 Imports of household, furnishing and floor-covering textiles into The Netherlands in volume and value, 1999-2001

	1999		2000		2001	
	'000 tons	€ millions	'000 tons	€ millions	'000 tons	€ millions
Floor coverings	17	308	19	296	21	255
Household textiles	28	194	27	195	27	187
Furnishing textiles (incl. bedspreads)	7	66	7	69	8	75
Total imports	**52**	**568**	**53**	**560**	**56**	**517**
of which from:						
Other EU countries	11	344	9	305	9	261
Developing countries	33	187	34	209	35	207
Other countries	8	37	10	46	12	49

Source: Eurostat

	1999		2001	
	‘000 m^2	Average import price per m^2 in €	‘000 m^2	Average import price per m^2 in €
Hand-woven: kelims etc.	82	13.93	43	17.90
Coir, sisal etc.	797	5.82	663	5.72
Pile carpet	803	18.95	956	18.18
Pile rugs	1258	9.75	1419	11.78
Flat woven carpets	167	9.90	173	8.25
Flat woven rugs	831	4.82	1239	5.09
Total	**3938**	**9.88**	**4493**	**10.32**

Imports of textile floor coverings
Two product groups, tufted and needlefelt carpets, accounted for 84 percent of the total imported volume by The Netherlands. Belgium remained the dominant supplier for both groups. In total floor covering imports, Germany ranked second and Poland (mainly needlefelt carpets) third, followed by India (leading supplier of knotted and hand-woven carpets). The role of developing countries in Netherlands imports increased from 17 percent in value in 1999 to 21 percent in 2001, while average import prices from these countries increased strongly from € 4.13 to € 4.56. In terms of value, 81 percent of imports of knotted and hand-woven carpets came from developing countries, whereas imports of tufted carpets came for 4 percent from these countries.
Netherlands imports of **knotted carpets** came from India, Morocco and Nepal. In total 565,000 million square metres of knotted carpets were imported by The Netherlands, of which 55 percent were woollen knotted carpets with up to 350 rows (average import price:€ 29.87) and 15 percent with 350-500 rows (average import price € 48.82).
Netherlands imports of **woven floor coverings** increased in volume and in value in the period 1999-2001.
Major product items, like pile rugs of man-made fibres and flat woven rugs of vegetable textiles, increased in terms of volume caused by cheap imports from respectively China and India.
Imports of woven floor coverings can be divided into (see above).

Imports of tufted carpets decreased from 44.3 million m^2 in 1999 to 33.4 million in 2001, of which 22 percent tiles. Non-printed nylon carpets and nylon tiles were the major imported product groups. The average import price of tufted carpets was € 4.27 per square metre in 2001, which was lower than in 1999: € 4.42. 88 percent of tufted floor coverings came from other EU countries in terms of value and only 4 percent from developing countries, mainly India and South Africa.
Imports of needlefelt floor coverings decreased too, from 22.9 million m^2 with an average price of € 1.31 in

Table 5.13 Leading (5) suppliers of textile floor coverings to The Netherlands for product groups in 2001
(million square metres)

	1999	2001	Five leading suppliers in 2001: (import share in % between brackets)
Knotted	0.9	0.6	India (39%), Morocco (16%), Nepal (14%), Switzerland (12%), Germany (5%)
Hand-woven	0.9	0.7	India (57%), Italy (12%), Slovenia (10%), Belgium (9%), Portugal (4%)
Woven pile	2.1	2.4	Belgium (49%), China (17%), USA (8%), Switzerland (6%), India (3%)
Flat woven	1.0	1.4	India (35%), Belgium (23%), China (22%), Mexico (5%), Hungary (4%)
Tufted	43.9	32.7	Belgium (71%), Germany (15%), UK (4%), Switzerland (3%), USA (2%)
Needlefelts	22.9	14.4	Belgium (67%), Poland (14%), Germany (7%), France (3%), Czech Rep. (2%)
Other carpets	2.8	3.7	Brazil (23%), China (23%), India (13%), UK (9%), Egypt (8%)
Total imports	**74.5**	**55.9**	**Belgium (62%), Germany (11%), Poland (4%), India (3%), UK (3%)**

Source: Eurostat

1999 to 14.4 million m^2 with an average price of € 1.52 in 2001. Imports of tiles were very limited in the felt sector. Exports of developing countries in this sector to The Netherlands were also very limited.

Household textiles

Synthetic **blankets** accounted for 63 percent of the total value of Netherlands imports. An increasing part of imported blankets came from developing countries: 54% in volume and 56% in value in 2001. In total 2.3 million blankets were imported in 2001, of which the leading supplier remained China with 1.4 million blankets and an average import price of € 2.65.
Other major suppliers were Turkey, Italy and Indonesia.
The share of cotton products in imports of **bed linen** stabilized at 89 percent. More than half of the total imports of bed linen concerned printed woven cotton bed linen, non-printed woven cotton bed linen 24 percent and knitted cotton bed linen 13 percent. Pakistan is by far the leading exporter of bed linen to The Netherlands with total exports of € 33.1 million or 35 percent of total imports in 2001. Around 34 percent of imports of printed woven cotton bed linen came from this country. Turkey is the second supplier with € 13.2 million and was followed by EU partners Portugal, Belgium and Germany. 65 percent of imported bed linen came from developing countries. Average import prices were € 7.00 per kg, of which the two major suppliers showed prices of € 5.75 (Pakistan) and € 7.56 (Turkey).
China was the leading exporter of **bedspreads** to The Netherlands with 486,000 units or 41 percent of total imports in 2001, followed by India (335,000), Pakistan (115,000), Belgium (96,000) and Turkey (33,000).
Imports of **table linen** increased from € 16.2 million in 1999 to € 18.0 million in 2001, of which 59 percent was cotton-made and 27 percent was made of synthetic fibres.
India is the leading exporter of table linen to The Netherlands with 710 tons (35% of total imports) in 2001, followed by Germany (15%), China (14%) and Turkey (13%). Other suppliers were Pakistan, Italy and Belgium. Average import prices per kg from outside the EU varied from € 4.47 (Pakistan) to € 6.56 (Turkey) and to € 8.24 (India).
Imports of cotton products dominated in the product group **bathroom and kitchen linen** and accounted for 95 percent. In 2001, 7,220 tons of cotton towelling were imported into The Netherlands with an average price of € 7.00 per kg. In 1999 average import prices were lower, namely € 6.75 per kg. Almost 70 percent of total imports in this product group came from developing countries in 2001.The leading supplier of cotton towelling was Turkey with 2,409 tons or 33 percent of total imports in 2001 with an average kilogram/ price of € 6.57, followed by Pakistan (1,497 tons at € 5.50), Brazil (708 tons at € 7.89) and the EU countries Belgium (585 tons at € 9.97) and Portugal (569 tons at € 8.94). Significant other suppliers from outside the EU were: China, Indonesia and India .
Woven cotton bathroom and kitchen linen came for 29 percent (in terms of volume) from Pakistan in 2001: 352 tons with an average import price of € 4.11 per kg, Portugal 212 tons (€ 7.92 per kg), Turkey 174 tons (€ 6.92 per kg) and India 135 tons (€ 6.69 per kg).

Furnishing textiles

Three product groups: cotton woven curtains (38% of total imports of curtains), synthetic woven (33%) and synthetic knitted (19%) dominated imports of curtains into The Netherlands. The role of developing countries was limited to 25 percent of imports in volume in 2001, with a more important role for other EU countries and CEECs. Curtains came for 31 percent from Poland (1,476 tons, mainly cotton woven with an average price of € 5.31), Belgium (2,504 ton, mainly cotton a € 9.21 per kg), Turkey (1,371 tons, mainly made of woven synthetics at € 15.81 per kg and knitted synthetics € 13.82 per kg) and Germany (1,3231 tons, mainly knitted synthetics at € 20.78 per kg).
Other furnishing textiles came mainly from China (21% in terms of volume) and India (13%) in 2001. Other suppliers were Czech Republic, Belgium and Poland.

Italy

Italian imports of household, furnishing and floor-covering textiles amounted to € 472 million in 2001. Of the total, 47 percent of the value was accounted for by household textiles, and 42 percent by floor coverings.
Imports increased in volume (8 percent yearly in the period 1999-2001) and in value (3.5 percent yearly), which indicated more imports against 3.4 percent lower prices, mainly caused by developments in imports of floor coverings.
The very high import share of developing countries in Italian imports of household, furnishing and floor-covering textiles increased very slightly in terms of value to almost 57 percent in 2001. Imports from Asian developing countries like Pakistan, India and to a lesser degree China increased, while imports from Iran decreased. Imports from EU countries like Austria, Portugal and The Netherlands increased, imports from France and UK decreased, while imports from Germany and Belgium stabilized. Imports from Mediterranean countries, mainly Turkey, increased. The strongest runner-up in Italian imports was Moldova. The role of ACP countries was very limited.

Imports of textile floor coverings

Again, Belgium is the leading supplier of floor coverings but as opposed to other major countries with import shares between 49 and 62 percent, Italian imports from Belgium were limited to 19 percent.
Developing countries played an important role: India was the second supplier, Egypt ranked third and China fifth just behind The Netherlands. However, imports from

Table 5.14 Imports of household, furnishing and floor-covering textiles into Italy in volume and value, 1999-2001

	1999		2000		2001	
	'000 tons	€ millions	'000 tons	€ millions	'000 tons	€ millions
Floor coverings	33	202	36	212	37	196
Household textiles	31	198	35	218	36	221
Furnishing textiles (incl. bedspreads)	4	41	5	51	6	55
Total imports	**68**	**441**	**76**	**481**	**79**	**472**
of which from:						
Other EU countries	23	161	26	173	27	167
Developing countries	39	245	43	269	45	267
Other countries	6	35	7	39	7	38

Source: Eurostat

developing countries decreased from € 96 million in 1999 to € 91 million in 2001, mainly caused by decreased imports in knotted carpets. In terms of value, 83 percent of imports of knotted and hand-woven carpets came from developing countries, but imports of (other) woven, tufted and needlefelt carpets came in total for 12 percent from these countries.

Belgium is the leading supplier in woven piles, tufted and needlefelt floor coverings, Iran in knotted carpets and India in hand-woven carpets and other-than-mentioned carpets.

Italian imports of **knotted carpets** came mainly from Asian developing countries, like Iran, Pakistan, China and Aghanistan. Most important in this product group were carpets with 350-500 rows: totally 1.5 million m^2 were imported in 2001 of which 69 percent from Iran (average import price almost € 30.00).

Italian imports of **woven floor coverings** increased in volume and in value in the period 1999-2001, while average import prices decreased, mainly caused by imported pile rugs. Imports of a major product item, like pile rugs, increased considerably (+ 38%) in volume, while imports of another major product, namely flat woven rugs decreased slightly (-6%). Imports of all other woven products, excepted han-wovens increased. Imports of woven floor coverings can be classified as below.

Imports of tufted carpets increased from 4.3 million square metres in 1999 to 4.7 million in 2001, of which 11 percent tiles. Nylon carpets in all varieties (printed, non-printed and tiles) were the major product groups. The average import price of tufted carpets was € 7.62 per square metre in 2001, which was somewhat lower than in 1999: €7.88. 88 percent of tufted floor coverings came from other EU countries in terms of value and 6 percent from developing countries, mainly woollen tufted carpets from India, China, Turkey and Morocco.

	1999		2001	
	'000 m^2	Average import price per m^2 in €	'000 m^2	Average import price per m^2 in €
Hand-woven: kelims etc.	406	15.26	386	19.13
Coir, sisal etc.	464	7.72	549	6.58
Pile carpet	739	13.40	799	14.96
Pile rugs	2,269	9.21	3,122	6.73
Flat woven carpets	368	5.50	559	6.86
Flat woven rugs	2,776	4.96	2,603	5.07
Total	**7,022**	**8.03**	**8,018**	**7.60**

Table 5.15	Leading (5) suppliers of textile floor coverings to Italy for product groups in 2001 (million square metres)		
	1999	**2001**	**Five leading suppliers in 2001:** (import share in % between brackets)
Knotted	2.6	2.6	Iran (39%), Egypt (16%), Pakistan (12%), Turkey (10%), China (9%)
Hand-woven	0.9	0.9	India (44%), China (11%), Iran (11%), Netherlands (7%), France (6%)
Woven pile	3.0	3.9	Belgium (39%), India (15%), Turkey (12%), Austria (12%), Egypt (8%)
Flat woven	3.1	3.2	India (39%), Austria (20%) , China (8%) , France (5%), Germany (5%)
Tufted	4.3	4.7	Belgium (30%), Netherlands (21%), Germany (12%), France (7%), Austria (5%)
Needlefelts	1.3	2.6	Belgium (51%), Netherlands (24%), Egypt (8%), Germany (7%), Switzerland (5%)
Other carpets	2.3	4.5	India (26%), China (23%), Egypt (16%), Turkey (9%), Germany (7%)
Total imports	**17.5**	**22.4**	**Belgium (19%), India (16%), Egypt (9%), Netherlands (9%), China (8%)**

Source: Eurostat

Imports of needlefelt floor coverings doubled in the period 1999-2001: from 1.3 million m^2 with an average price of € 3.89 in 1999 to 2.6 million m^2 with an average price of € 2.90 in 2001. Imports of tiles accounted for 2 percent in the felt sector.
Developing countries exported 3 percent in terms of value in this sector to Italy, mainly Egypt.

Household textiles

Imports of the major product groups bed linen and bathroom linen accounted for respectively 89 and 90 percent of cotton-made products. In the other product groups, the role of cotton in total imports was also important, however, less dominating.
Blankets came for 57 percent mainly from Asian developing countries (China, Indonesia, India) and for 27 percent from other EU countries, mainly Spain, Austria, France and Portugal. The leading supplier was China with exports of 1.7 million blankets, valued at more than € 7.0 million in 2001. Other suppliers from outside the EU were Indonesia (€ 1.7 million), India (€ 0.6 million) and Romania (€ 0.5 million).
Italian imports of bed linen came for 58 percent from developing countries in Asia, the Mediterranean Rim and CEECs, for 21 percent from other CEECs and for 20 percent from other EU countries.
Turkey is the leading exporter of **bed linen** to Italy with total exports of € 12.6 million or 15 percent of total imports in 2001, followed by Bulgaria with 14 percent, Pakistan with 12 percent and Moldova with 11 percent. Other suppliers were Romania, China, India, Austria and Portugal with import shares between 7 and 4 percent. Average import prices were € 5.98 per kg, while the major suppliers showed prices of € 6.90 (Turkey) and € 4.68 (Bulgaria).
Imported **bedspreads** were for 70 percent cotton-made. Developing countries became more important: 68 percent of total imports came from these countries in 2001. India (460 tons), Austria (201 tons), Pakistan (186 tons), Portugal (162 tons) and Bosnia/Herzegovina (147 tons) were leading exporters of bedspreads to Italy in 2001. Imported bedspreads had an average price of € 7.51 per kg.

The dominant role of developing countries in Italian imports is also valid for the product group table linen: 72 percent of total imports in 2001. China remained the leading exporter of table linen with a value of € 8.8 million or 24 percent in 2001, followed by India with 22 percent, Croatia (8%), France (5%), Germany (5%). Other countries with imports shares between 5 and 3 percent were Pakistan, Belgium, Egypt and Moldova. Imports from India, Croatia, Pakistan and Egypt consisted almost completely of woven cotton table linen, while imports from EU countries and China were table linen of cotton as well as synthetic fibres.
The leading supplier of **cotton towelling** was Egypt with 2,553 tons in 2001 with an average kilogram/price of € 4.05, followed by Pakistan (1,825 tons at € 2.67), Turkey (1,469 tons at € 7.19), China (1,251 tons at € 4.25), Portugal (913 tons at € 9.40) and Poland (412 tons at € 2.13). Significant other suppliers from outside the EU were: India, Brazil and Bangladesh.
Woven cotton **bath and kitchen linen** came for 31 percent (in terms of volume) from Pakistan in 2001 with an average import price of € 3.07 per kg, Turkey for 15 percent (€ 7.54), Egypt for 12 percent (€ 4.09 per kg) and India for 6 percent (€ 4.58 per kg).

Furnishing textiles

Imports of curtains increased from € 20.9 million in 1999 to € 26.3 million in 2001 and imports of other furnishing textiles increased from € 20.3 million to 29.0 million. The role of developing countries varied strongly: 35 percent (in value) of curtains came from developing countries and 72 percent of other furnishings.

Curtains came from Austria (452 tons or 25% of total imports, mainly cotton woven a € 9.18 per kg or € 4.21 per m^2), India (269 tons, mainly woven cotton), France (268 tons, mainly woven cotton) and China (251 tons, mainly woven cotton) in 2001. The average import price of cotton woven curtains was € 11.58 per kg and € 3.45 per m^2 in 2001.
Other furnishing textiles came from China, 38 percent of total imports mainly cotton and synthetic woven furnishings, India (16%, mainly woven cotton), Spain (9%, mainly woven synthetics), Austria (5%, mainly woven cotton) and Slovenia (5%, mainly woven synthetics) in 2001.

5.3 The role of developing countries in EU imports

The role of developing countries in EU imports of household, furnishing and floor-covering textiles increased considerably and rose from € 3.0 billion in 1999 to 3.5 billion in 2001. Imports from countries outside the EU became more important than intra-EU trade since 2000. The import share of developing countries in total EU imports rose from 37 percent in 1999 to 40 percent in 2000.
As described above, the role of developing countries in EU imports and also in imports by individual major EU countries varied considerably. Developing countries

Table 5.16 EU imports of household, furnishing and floor-covering textiles from area of developing countries by product group, 2001 *(€ million)*

	Total EU imports	Total from developing countries	of which from (area of developing countries):					
			ACP ctrs	CEECs	Mediter-ranean Rim	Asia	Central & South America	Other
Carpets and rugs:								
Knotted	798	704	0	4	67	633	-	0
Hand-woven	100	63	0	0	5	58	0	0
Woven pile constr.	542	91	0	0	27	59	1	4
Flat woven	187	90	0	0	10	77	2	1
Tufted	1,940	95	0	1	16	73	3	2
Needlefelt	222	1	-	0	0	0	0	1
Other	181	55	0	0	11	38	6	0
	3,970	**1,099**	**0**	**5**	**136**	**938**	**12**	**8**
Household textiles:								
Blankets	235	98	0	6	13	76	2	1
Bed linen	1,713	848	1	25	288	529	5	1
Bed spreads	138	83	0	1	4	78	0	0
Table linen	450	254	1	10	46	193	3	0
Bathroom & kitchen	1,175	607	1	9	288	251	57	1
	3,711	**1,890**	**3**	**51**	**639**	**1,127**	**67**	**3**
Furnishings:								
Curtains	681	284	0	3	75	201	0	5
Other furnishings	410	235	1	3	41	189	1	0
	1,091	**519**	**1**	**6**	**116**	**390**	**1**	**5**
Total imports 2001	**8,772**	**3,508**	**4**	**62**	**891**	**2,455**	**80**	**16**
Total imports 1999	*8,066*	*3,023*	*4*	*56*	*705*	*2,160*	*86*	*12*

Source: derived from Eurostat

The role of individual *developing* countries in total and for the product groups distinguished was highlighted in chapter 5.1.

play a dominant role in product groups like knotted and hand-woven floor coverings, while in imports of felt and tufted floor coverings this role is negligible. The import share of developing countries in the sector household textile and furnishings grew to 51 percent in 2001.
In terms of value, imports from developing countries in Asia grew 14 percent in the period under review to € 2.5 billion; developing countries in the Mediterranean grew 26 percent to € 0.9 billion. Imports from developing countries from Central and Eastern Europe grew 11 percent to € 62 million, while imports from Central and South American countries decreased from € 86 million in 1999 to € 80 million in 2001.
Imports from ACP countries showed a small growth, despite the fact that the role of these countries in EU imports remained rather limited, with less than € 4 million.

6 EXPORTS

Exports by EU countries are for 70 percent intra-EU trade. Germany was the leading destination for exports by other EU countries for many years. The UK took this position for the first time in 2001 with an export share of 15 percent, followed by Germany with 13 percent. The most important destination outside the EU was the USA with 10 percent of total EU exports or 32 percent of total extra-EU exports, followed by Switzerland (10% of extra-EU exports). Exports to the USA increased considerably for many years (22% in 2000) but decreased 3 percent in 2001 to € 732 million. Exports to Switzerland decreased slightly (1.9% in the period 1999-2001) to € 232 million in 2001. Other destinations were Poland, Japan, Norway, Russia, Czech Republic and Saudi Arabia. Exports to all destinations mentioned increased, except exports to Japan (from € 95 million in 2000 to 85 million in 2001) and Norway (from € 92 million in 2000 to € 86 million in 2001. Belgium remained the leading EU exporter with almost 34 percent of total EU exports, followed by Portugal, Germany, The Netherlands and France. 61 percent of total EU exports concerned carpets and other textile floor coverings; household textiles for 32 percent; curtains and other furnishing textiles 7 percent.
The most important product groups in EU exports were tufted carpets (34 percent of total exports in terms of value); bed linen (15%); woven carpets of pile construction (14%); and, bathroom and kitchen linen (9%).
Major products in exports to the USA were: woven carpets of pile construction of wool and man-made fibres, nylon non-printed carpets and woollen printed carpets, cotton bed-linen, cotton towels and cotton bedspreads. Non-printed carpets of nylon went also to Switzerland and Poland. An important part of the exports to Russia and Japan included woven carpets of pile construction of man-made fibres. Felt carpets and (non-printed) nylon carpets went to the Czech Republic.

Figure 6.1 EU exports of household textiles, furnishings and floorcoverings, 1999-2001

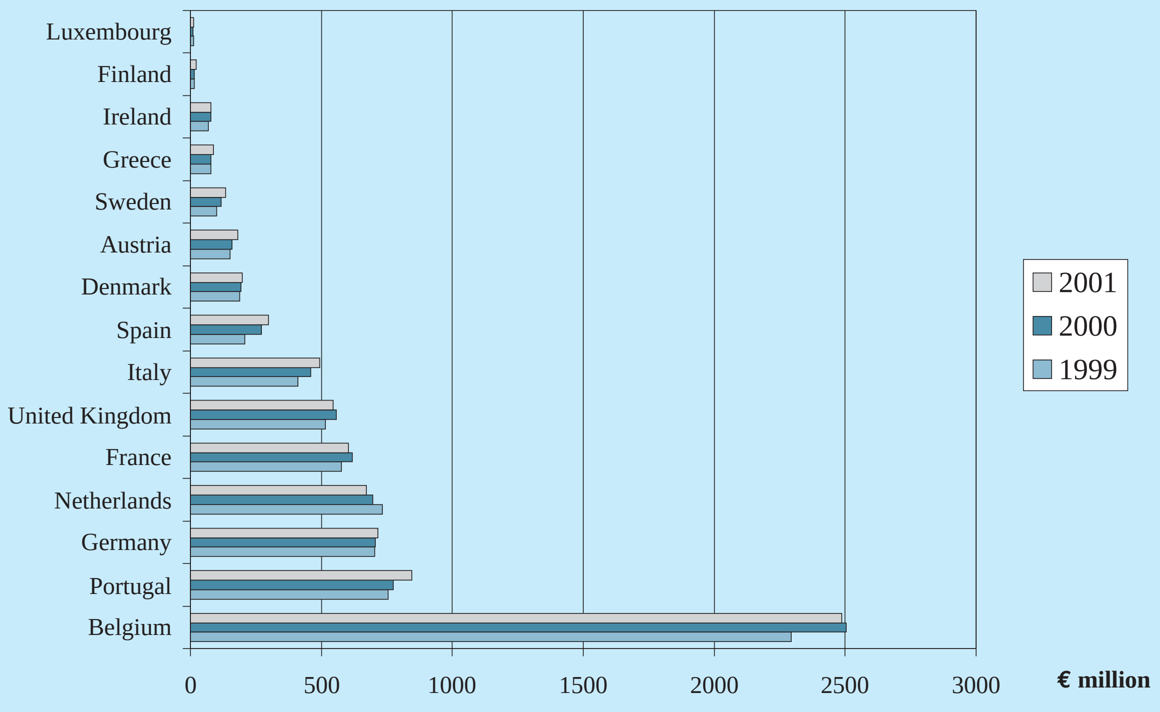


Table 6.1 Exports of household, furnishing and floor-covering textiles by the EU, 1999-2001

	1999		2000		2001	
	'000 tons	€ millions	'000 tons	€ millions	'000 tons	€ millions
Knotted carpets	6.9	151	7.4	164	7.6	170
Woven carpets	4.6	38	4.4	38	4.7	39
Woven carpets of pile constr.	108.7	933	122.0	1,041	123.5	1,060
Flat woven carpets	11.9	115	14.5	123	14.8	125
Tufted carpets	292.1	2,455	297.0	2,527	310.7	2,545
Felt carpets	82.8	337	84.6	353	87.6	361
Other carpets	38.9	202	37.5	204	38.1	206
Total floor coverings	**545.9**	**4,231**	**567.4**	**4,450**	**587.0**	**4,507**
Blankets	24.0	200	26.5	226	31.4	225
Bed linen	115.3	974	100.0	1,058	119.2	1,076
Bedspreads	12.6	103	12.0	106	13.4	111
Table linen	16.4	249	15.6	251	13.7	230
Bathroom and kitchen linen	70.0	637	70.4	674	73.4	700
Total household textiles	**238.3**	**2,163**	**224.5**	**2,315**	**251.1**	**2,342**
Curtains	25.1	330	22.8	360	25.2	364
Other furnishing articles	12.9	140	13.1	163	14.6	166
Total furnishings	**38.0**	**470**	**35.9**	**523**	**39.8**	**530**
Total exports	**822.2**	**6,864**	**827.8**	**7,289**	**877.9**	**7,379**

Source: Eurostat

Germany

Exports by Germany increased in the period 1999-2001 by 2 percent in terms of value, mainly to destinations outside the EU. German exports are for 58 percent intra-EU trade, of which The Netherlands (16% of total exports), Austria (14%), and France (7 percent) were the most important destinations. Exports to The Netherlands, Austria and France decreased, while exports to the UK increased slightly. The most important destination outside the EU was Switzerland with 12 percent of total exports, followed by Czech Republic (7%), USA (6%), Poland, Japan and Turkey. Exports to Switzerland increased (less than 1% yearly to € 89.5 million in 2001), exports to the USA even more considerably (36% yearly to € 41.7 million in 2001), just like exports to Czech Republic (21% yearly to € 47.1 million) and Japan (only 1% yearly to € 11.2 million). Exports to all mentioned destinations outside the EU increased except exports to Poland (from € 25.6 million in 1999 to 22.3 million in 2001). Exports of floor coverings accounted for 57 percent of total German exports, household textiles for 40 percent and furnishings for 3 percent.

France

French exports increased in 2000 (7%), fell slightly in 2001 (2%), and reached an export value of just over € 600 million, mainly to destinations inside the EU. French exports are for 69 percent intra-EU trade, of which Belgium (16 percent of total exports), UK (15%), Germany (12%) and Spain (10%) were the most important. Exports to all countries mentioned decreased considerably, except exports to Spain.
The most important destination outside the EU was the USA with 6 percent of total exports, followed by Switzerland (5%), Japan, Poland and Russia (with export shares of between 1-2 percent each). Exports to Switzerland slightly increased (1.4 percent yearly to ECU 15.2 million in 1998), exports to all these non-EU destinations increased, of which exports to Russia showed the biggest growth.
French exports accounted for 50 percent floor coverings, for 45 percent household textiles and for 5 percent furnishings.

Italy

Exports by Italy increased strongly by just over 10 percent annually in terms of value in the period 1999-2001 to € 494 million. Italian exports accounted for 66 percent household textiles (mainly bed linen and towelling), for 24 percent floor coverings and for 10 percent furnishing textiles.
The leading destination for Italian exports is the USA with 17 percent of total Italian exports. 52 percent of exports went to other EU countries in 2001, of which France (almost 17% of total exports) and Germany (12%) were the most important. Exports to these three leading destinations increased, of which exports to the USA showed the biggest growth with 40 percent during the period 1999-2001.
Other important destinations outside the EU, besides the USA, were Switzerland (6%), Russia (2%), Saudi Arabia and Japan. Exports to these countries increased, varying from small growth (Switzerland and Saudi Arabia) to strong growth (Japan) and to booming growth (Russia).

UK

UK exports were for 60 percent intra-EU trade in 2001, of which Ireland (21 percent of total exports), The Netherlands and France (each country 8%) were the most important. Exports to Ireland and France grew and to The Netherlands decreased. The most important destination outside the EU was USA with 19 percent of total exports. Exports to this country increased slightly to € 105 million in 2001. Other destinations outside the EU were Switzerland, Hong Kong, Japan, and Canada. Exports to all these countries increased except exports to Hong Kong (from € 8.4 million in 1998 to € 8.1 million in 2001).
Floor coverings accounted for 66 percent of total UK exports, household textiles for 31 percent and furnishings for 3 percent. Two product groups (tufted and woven floor coverings) accounted for half of total UK exports in 2001.

The Netherlands

Exports by The Netherlands were for 81 percent intra-EU trade in 2001, mainly to Germany (24% of total exports), UK (20%), Belgium (17%), and France (9%).
Netherlands exports decreased 8.3 percent in the period 1999-2000, mainly caused by decreased exports to Germany. Lower exports to this leading destination were the result of negative developments on the consumer market of this neighbouring country.
Exports to Belgium and France decreased too, while exports to the UK increased 28 percent during the whole period under review. The most important destination outside the EU was USA with 6 percent of total exports, followed by Switzerland (2%), Poland, Czech Republic and Norway. Exports to the USA decreased almost 14 percent and to Switzerland 7 percent. Exports to all mentioned destinations outside the EU increased: Poland from € 8.4 million in 1999 to 9.9 million in 2001, Czech Republic from € 7.2 million in 1999 to 7.5 million in 2001 and Norway from € 4.3 million in 1999 to 5.2 million in 2001.
Exports of floor coverings accounted for 87 percent of total exports by The Netherlands, household textiles for 11 percent and furnishings for 2 percent.
80 percent of domestic production of textile floor coverings was exported in the period under review.
Re-exports (i.e. the export of imported) of household textiles was about 75 percent in 2001, which means that 25 percent of total exports was sold by domestic manufacturers of household textiles.

7 TRADE STRUCTURE

7.1 Introduction

Figure 7.1 shows the basic functions of the various kinds of exporting manufacturers and traders, agents, importing manufacturers, wholesalers and retailers either, or not, organised in buying or selling groups. Depending on its position in the market, the functions of a particular distribution organization will be linked with up- or downstream organizations with the same kind of specialisation. It is also possible for a given organization to take over (some of) the functions of the latter, in order to improve competitiveness (vertical integration). For instance, manufacturers, agents and retailer organizations, like multiples and department stores, may also function as importer/ wholesaler. Each of these groups has a different approach to business and the market, with its own specific interpretation of the marketing mix.
The enormous variety in existing relations between the companies mentioned in figure 7.1 in practice, makes it (nearly) impossible to reproduce these relations within the diagramme, which is the reason why no ‘connecting’ lines are drawn.

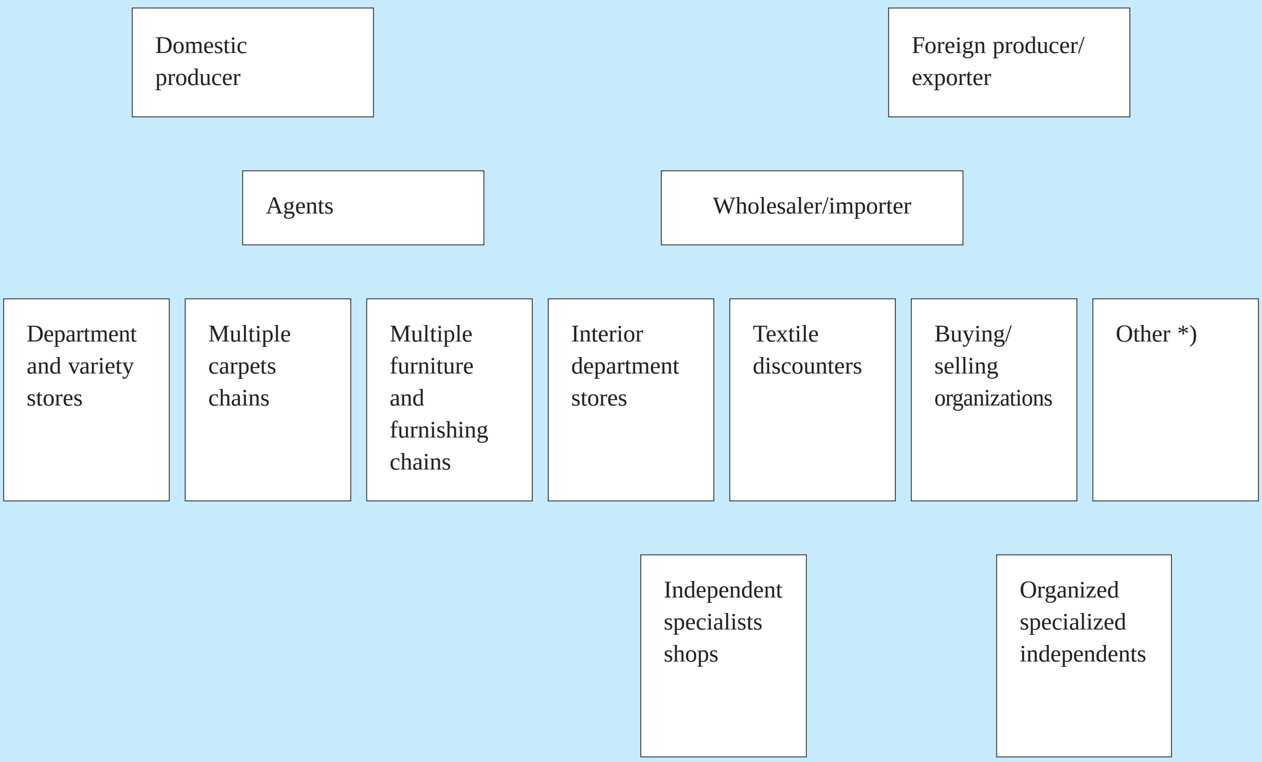
It is essential for the potential exporter to know into which product/market combination his products fit (or “which kind of business he is in”) as well as being familiar with the marketing and distribution characteristics of these product/market combinations. These may differ significantly from combination to combination.

7.2 Sales intermediaries

Different sales intermediaries have their place between industry and retail, like:

- **agents;** the sales agent is an independent intermediary between the (foreign) manufacturer and the retailer or retail organization, receiving a commission from the former. A development, issuing from the basic importer relationship, is the appointment of an agent to handle your goods. This relationship is only of use if the exporter has a totally merchandisable product i.e. of a suitable design, originated by the exporter, of relevant quality and price. Whilst his mark-up is much less than the importer’s, the agent will require a much higher

Figure 7.1 Distribution pattern for household, furnishing and floor-covering textiles in the EU



*) like mail-order houses, street markets, hyper and supermarkets.

input from the exporter. It is, therefore, a distinct development and can only come from a high degree of resourcefulness on the part of the manufacturers. The sales agent does not take title to the merchandise, but is limited to presenting samples to potential clients, obtaining orders, and forwarding these to the exporter. The role of the (selling) agent in household textiles is very limited.

- **Importers/wholesalers;** contrary to the agent, the wholesaler holds his own stocks at his own risk. The fact that many independent retailers as well as buying organizations and multiple stores are becoming more cautious about pre-ordering, preferring to sell from stock, is reinforcing the position of the importer/wholesaler. However, more and more bigger organizations buy directly or via buying offices and import by themselves. The choice of whether to sell directly to a wholesaler or through an agent depends on the type of supplier organization concerned and its product/market combinations. All the factors relating to pricing, collection forming, sampling, fashionability, delivery times, delivery frequency, product quality, exclusiveness, labels, packaging and promotion can play a role in this respect. Addresses of wholesale organizations are provided for reference in Appendix 4.

7.3 Retailers of household, furnishing and floor-covering textiles

Retailers constitute the final stage before products reach the consumer. A criterion for dividing the market is the composition of the total assortment: specialized wholly or partly in selling furnishings, in carpets and floor rugs, or in household textiles. Within the total group of furnishing shops, about two thirds of all stores sell carpets, curtains and other soft furnishings and the remaining shops sell exclusively carpets and/or floor rugs, while specialised oriental carpet outlets operate in all countries. Furniture stores rarely sell fitted carpets but frequently sell floor rugs as accessory items to their furniture ranges just like bed and bedding specialists sell beds but also mattresses, pillows, bed linen and floor rugs for the bedroom. Home furniture and furnishings, including all kinds of accessories, form the assortment in interior department stores. Non-specialists means stores with an assortment of various branches like department stores, discount stores, DIY stores, mail-order houses, grocery hyper- and supermarkets, street markets etc.

Independent specialist shops operate mainly in the middle and upper sections of the market in terms of quality and price. These shops offer the consumer substantial added value in terms of quality, service, interior decoration advice, fashionability and range of choice. This means that the products they sell have to be exclusive, high quality and good fashionable design and colour, otherwise customers will purchase at cheaper stores. They lack the economies of scale of larger outlets and consequently have to work with higher margins. Independent retailers can have a specialized or a mixed assortment. Furniture outlets (e.g. shops for household equipment, interior design), furnishing outlets (soft floor coverings, curtains) and household textiles outlets (e.g. linen shops and mixed textiles drapers) belong to this category.

Many independent specialist shops are members of buying or selling cooperatives, and, because of the need to compete with multiple stores, interior department stores and discount outlets, the tendency for firms to work together is increasing. Buying groups centralise a whole range of purchasing, marketing and selling services upon which their members can call.
They operate in a similar way to a department store except that the individual members remain independent entrepeneurs and free to decide the extent of their involvement in joint decision-making and purchasing. The buying groups have developed specialised franchise-type formulas for groups of members to work together in presenting and selling coordinated interior concepts and targeting specific consumer groups.
With regard to carpets, the individual members purchase leading promoted “A” brands directly from the EU manufacturers. A buying committee made up of members of the group selects the private label or “B” brand ranges of carpet. Once the selection has been made, the individual member shops order this carpet as required from the supplier factory or importer/wholesaler.
Authentic expensive oriental carpets have traditionally been sold through shops specialised in these floor coverings. This is still the case but, because of the fashion demand for Nepalese and Gabbeh and similar design carpets and the availability of rugs at cheaper prices, many different types of shop now sell these rugs to consumers.

Specialist carpet chains are centrally managed chains of shops selling primarily carpets and other floor coverings; they operate in the middle and lower end of the market. They offer a wide range of carpets for sale, holding stock of cheaper qualities and selling more expensive qualities from hanging swatches, the method which is typical for many specialist carpet shops. “A” brands are sold at recommended retail prices but aggressive pricing is frequently used as a promotional tool as well as the offer of a free carpet-laying service. Leading chains in the EU are Carpetright (market leader through 340 stores in the UK) and Carpetland (market leader in Belgium, The Netherlands, Switzerland and Germany).

Specialized furniture and/or furnishings chains
This category of retailers include the so-called interior department stores, large self-service stores, which sell all possible requirements for the home interior. The best example of this type of store is Ikea, the Swedish multinational store group, with stores in 33 countries all over the world, with 105 stores in the EU and a turnover of € 10.4 billion in the financial year 2000/2001, of which 21 percent in Germany, 13 percent in the USA and 12 percent in the UK. Ikea does not sell broadloom carpet but displays and sells a huge variety of floor rugs in cheap to medium price levels.
Another stores group includes Habitat from the UK. Laura Ashley (UK) is a leading (fashion and) furnishing chain. This chain has 203 UK stores and 67 in mainland Europe as well as 197 franchise outlets in two dozen countries, but will axe a number of foreign stores in a bid to reduce its overseas losses. The company will close six stores in Germany and five in France and will also reduce the number of new store openings.
Internationally operating furniture chains are, among others, Ka International from Spain and Roche Bobois from France.

Non-specialist outlets in this survey include:
Department stores: provide the customer with an opportunity to buy a wide range of products under one roof. Most are members of chains and have a centrally organised buying department
Discount chains: operate at the lowest level of the market and sell only cheap carpets and floor rugs. People who make their purchases here are chiefly interested in price, whereas quality or fashion tend to be secondary considerations. Besides discounters in floor coverings and furnishings, discounters operate in textiles (often indicated as textile supermarket). Their assortment include besides a variety of non-textile products, household textiles, outerwear and bodywear.
Mail-order houses: send illustrated catalogues of merchandise to potential customers who can make purchasing decisions at home and receive the goods by post or other distributors. Today, nearly all companies offer their assortment via Internet. They operate at the middle level of the market in terms of price and quality. The companies operating in many EU countries with a broad general assortment include, among others, the German-based Neckermann and Otto, La Redoute and Trois Suisses from France. Besides these companies, there are several mail-order houses, specialized in floor coverings and/or household textiles.
Grocery super- and hypermarkets, of which the main activities are in the provisions sector. Super- and hypermarkets have mostly very low priced household textiles and sometimes small floor rugs in their assortment. Household textiles can increasingly be found in grocery supermarkets due to their high rate of stock turnover and good profit margins, compared with the other product groups. The usual distribution channels of these companies are direct imports, wholesalers and service-merchandisers.
Street vendors are involved in clearing up stocks from wholesalers and retailers and are not themselves involved in importing.

7.4 EU trade channels for floor coverings

The typical channels of distribution for fitted carpets and for loose floor rugs in many EU countries are not the same. Fitted carpet are mainly of Belgian, Netherlands or other EU manufacture and individual stores buy requirements directly from the factories. Retailers do not typically hold large stocks of carpets, but use standard display systems and samples to show the merchandise to their customers. The logistics of carpet transport and delivery are very fast and efficient and many orders are serviced from stock within one or two days.
Manufacturers' own salesmen or commission agents do the selling, and brand promotion is very important. Wholesalers do not play an important role in the distribution of “A” brands. However, most wholesalers and the buying combinations have developed their own successful private label brands. Many companies use different labels to denote a specific style or theme, which incorporates not only carpets, but also curtain materials, upholstery fabrics, net curtains and accessories like cushions and other drapes.
The objective is to sell a whole range of products which together combine into a complete interior look.

The importer/wholesaler does play a very important role in the distribution of loose floor rugs.
Specialist companies handle only floor rugs and some specialise exclusively in import from countries like India, Nepal, China, Turkey etc. These importers are constantly looking for new products and sources. Retailers, except very large multiples like Ikea and Carpetland, rarely import rugs directly from sources outside Europe. They prefer to buy through importers and/or agents who are in a better position to monitor the quality and reliability of production and delivery, and who have on-going direct contact with the producers to advise them on changing demands in terms of fashion designs, qualities and colours.
The table below gives an overview of how the consumer has been reached in the EU member states. The role of specialized retailer remains rather important and accounted for almost three quarters of total retail sales.

Table 7.1	Market shares in floor-covering textiles by types of retail channels in major EU countries, 2001 (in % of value)							
	Specialists:				**Non-specialists:**			**Total**
	Independent furniture and/or furnishing shops	**Furniture and/or furnishing chains**	**Independent carpet shops**	**Carpet chains**	**Department and vatiety stores**	**Mail-order houses**	**Other**	
France	15	19	23	23	8	10	2	100
Germany	18	16	20	18	9	12	7	100
Italy	64	12	n.a.	n.a.	14	0	10	100
Netherlands	16	19	25	29	2	1	8	100
UK	8	14	10	39	10	11	8	100
EU (15)	**16**	**17**	**18**	**22**	**10**	**8**	**9**	**100**

Derived from several sources

7.5 EU trade channels for household textiles

In many European countries, the distribution of household and furnishing textiles has been dominated by a small number of retail organizations. On the one side they operate from interior department stores (Ikea), on the other side from more generally oriented department and variety stores (Marks & Spencer, Hema) or hypermarkets (Hypermarchés). This also means a decreasing market share for branded labels in favour of private labels.

Most of the major retail organizations set up their own buying organizations or production units in low-labour-cost countries. This means that retailers are able to bypass the domestic manufacturers.

Distribution channels for household textiles differ greatly across the EU member states. The UK has a high

Table 7.2 Market shares in household textiles by types of retail channels in the EU, 2001 (in % of value)

	Specialized multiples *)	**Specialized independents**	**Department and variety stores**	**Mail-order houses**	**Super- and hyper markets**	**Others **)**	**Total**
Austria	22	38	14	11	9	6	100
Belgium	36	22	12	8	12	10	100
Denmark	51	16	11	4	10	8	100
Finland	26	38	16	5	10	5	100
France	23	12	10	20	25	10	100
Germany	32	19	15	14	12	8	100
Greece	8	54	8	0	12	18	100
Ireland	24	16	31	11	7	11	100
Italy	16	52	10	0	8	14	100
Netherlands	33	24	24	3	6	10	100
Portugal	20	50	10	0	10	10	100
Spain	26	35	16	2	10	11	100
Sweden	48	18	10	5	11	8	100
UK	30	12	30	15	5	8	100
Total EU	**28**	**27**	**16**	**8**	**11**	**10**	**100**

*) including furniture, DIY stores and textile discounters
**) including street markets
Derived from several sources

concentration of distribution indicated by the relatively low share of independent retailers. The southern member states Portugal, Italy, Spain and Greece, however, have high market shares (between 40-60 percent) for independent retailers. These retailers buy mainly from manufacturers and wholesalers/importers, contrary for instance to Germany and The Netherlands, where many independent retailers are members of buying corporations. Large retailers' groups hold the biggest share of the market in the northern member states. Table 7.2 gives an overview of how the consumer has been reached in several EU member states.

7.6 Distribution of household, furnishing and floor-covering textiles in major EU countries

Germany

As in other northern EU markets large carpet chains and multiple stores groups are increasing their retail market share in the floor covering sector at the expense of the specialist carpet and furnishing shops. The market share of independent specialized retailers is steadily shrinking. Market shares of interior department stores, variety stores and dicounters has increased in the household textiles sector at the expense of specialized independents, mail-order companies and (general) department stores.
The number of outlets operating in furnishings and floor-covering textiles can be estimated at about 5,500; in household textiles about 2,800 and in other furnishings 540. About 50 percent of these independent retailers co-operates, mainly in buying groups, like Wotex GmbH, 250 members with 261 outlets in curtains, carpets and carpeting; Katag 800 outlets, partly including home and house textiles; INKU; FHR with 460 members; Coratex, curtains and floor coverings and, specialized in floor coverings, Fachhandelsring and Wümeg-Verbandgruppe.
Organizations specialized in bed products including textiles are Ambra (65 outlets) and Bettenring.
The latter with two formula Dormabelle (200 outlets in Germany, Switzerland, Austria and Italy) and the discount formula Schlummermarket (12 outlets).
Decor Union is an important chain with voluntary membership.
In Germany, deliveries of broadloom carpet to independent speciality shops are made both directly from factories and through regional sales depots or wholesalers. In the distribution of loose floor rugs and household textiles, other retail outlets such as department stores, furniture stores, home interior department stores and mail order play a more important part. Imported rugs are usually handled by one principle importer, who then distributes either directly or through regional wholesalers to the stores.

Thousands of wholesalers operate in Germany.
A selection of German wholesalers can be made by searching under the several free available trade directories (see appendix 9 of this survey).
A selection can also be made by searching under *http://www.dino-online.de;* typing under search: 'grosshandel teppich' (wholesale carpets) resulting in about 2,500 sites and typing 'grosshandel haustextilien'(wholesale household textiles) in about 175 sites. Another possibility is typing 'grosshandel heimtextil'(wholesale home textiles).
Further, a very small selection is given in appendix 14.
Leading multiples with carpets, other floor coverings and furnishings in their assortment are: ARO-Heimtextile, Peter Essers, Jute, Teppich Domäne Harste, TTL and TTW. Carpetland's holding company Mitiska acquired 141 retail stores in Germany from Frick Teppichboden, followed by a further 38 outlets purchased from Berlin-based decoration chain Wand & Boden in 2000, claimed to be market leader in carpets.
Interior department stores are Ikea and Domäne Einrichtungsmärkte. Ikea operates with 29 stores in Germany, besides home shopping activities. Total sales amounted to about € 2.2 billion in 2000/2001.
Teppich-Kibek is a specialized mail-order company (besides having 15 outlets) in the mail-order sector. The assortment of Teppich-Kibek includes carpets, floor rugs, household textiles (mainly bed linen) and accessories. Another specialized mail order house in home textiles is Erwin Müller. More general mail-order houses take a significant place in the German retail market. Leading companies are Quelle, Neckermann (both from Karstadt/Quelle) and Otto Versand. The Otto Group is the world's biggest mail-order house, due to its many foreign activities. All mail-order companies mentioned have outlets and they all have floor rugs, curtains and household textiles in their assortment.
Leading department stores are Karstadt and Kaufhof. Karstadt (189 stores) just like Hertie (32 stores) is part of Karstadt/Quelle; Kaufhof (132 stores under several formula) is part of Metro. Another department store is Breuninger with 14 stores.
Leading discounters are NKD, Tengelmann, K+L Ruppert, Adler, Lidl Discount, Eisel and Zeeman. NKD (888 outlets in Germany and 122 in Austria and some East European countries) sells, besides all kinds of clothing, household textiles and beds. Just like other discounters, NKD buys in large quantities and avoids middlemen so as to get low-priced goods in the shops quickly. Tengelmann's (in total 3,450 outlets) sells household textiles via KiK, one of the four formulas of this internationally operating chain.
Schwarz Holding with among others 2,000 Lidl Discount stores, K+L Ruppert (37 outlets), Adler ModeMarkt (99 outlets, of which 88 in Germany and owned by Divaco) and Eisel (220 outlets of 200-400 m^2) are other discounters, just like textile discounter Zeeman from The Netherlands, which is also

active on the German market with 134 outlets.
Many household textiles, like towels, tea towels, cover sheets and similar articles can be found increasingly in super- and hypermarkets, like: Metro (chains: Real, Extra and Kaufhof), Aldi (3,300 outlets with an estimated € 0.8 billion sales in textiles and clothing), Edeka/AVA, Tengelmann and Rewe. Most of these retail organizations regularly or incidentally offer household textiles.

United Kingdom

The total number of retailer companies selling textiles is now about 1,600 with just over 3,000 outlets.
The retail trade in carpets in the UK has undergone a period of rapid concentration in the last decade. Multiple retailers such as chains of carpet shops, DIY stores and department stores, increasingly in out-of-town locations, increased their share of carpet sales from 58 to 65 percent of the total between 1999 and 2001. The two major carpet retail specialists Allied Carpets (Allied and Carpetland stores) operates with 235 outlets and Carpetright with 340 outlets; together they control nearly 30 percent of the market. Other chains are Carpetworld and Fired Earth.
Several mail-order companies, notably GUS and Littlewoods, are active in retail carpet sales.
Major wholesalers in carpets in the UK are the Paul Eyre Group from Doncaster; Joseph, Hamilton & Seaton, this Lichfield-based company being a subsidiary of Chapelthorpe; M.Mercadom, based in Leeds and part of the Headlam Group.
The structure of household and furnishing textiles retailing in UK is, just as in the case of floor covering, one of the most concentrated in the world. The UK market for household and furnishing textiles is dominated by own label brands (over 60 percent retailers' own labels). The major department and variety stores all have their own-label ranges.
Variety stores account for 26 percent of household and furnishing textiles sales and department stores a further 10. Specialized stores (multiples and independents) have a share of 26%, which is rather low compared with Germany (36 percent) and The Netherlands (58 percent). Mail-order companies accounted for a stable 15 percent of the consumer market, while market shares for discount stores increased to 9 percent in 2001.
The role of interior department store Ikea, operating with 11 stores in the UK, reached a turnover of about € 1.2 billion in 2000/2001 and, just like in other countries, includes household textiles and loose floor rugs. The largest multiple specialist retailer in home furnishings is Laura Ashley with 217 outlets, including concessions in other stores. This company offer not only home textiles but also clothing and accessories.
The most important variety chain is Marks & Spencer with some 300 stores in the UK (market share in value of household textiles about 15 percent). A new strategy led to closure of almost all stores on the European Continent in 2001, closure of the direct-mail activities and the sale of Brooks Brothers and King Supermarkets in the USA. Other variety chains are storehouses Bhs (160), Littlewoods (115) and Woolworth (almost 800).
Department stores include chains such as Debenhams (90 stores and part of the Burton Group), House of Fraser (50), Allders (37) and John Lewis (25).
Some companies active in the mail-order sector (catalogue-based but also direct-mail operations) are: GUS/Argos, Littlewoods Home Shopping (in co-operation with Arcadia). The German mail-order giant Otto Versand owns Grattan and Freemans, while French PRP owns Empire Stores.
Supermarket chain ASDA (part of American Wal-Mart) accounts for the main part of household textiles sales by grocers. Sales by the leading grocery retailer Tesco are much smaller, however, no figures are available.

France

According to French national statistics, 1,000 retail companies were in 2001 classified in the category carpets and wallpapers sector and 5,300 in household textiles.
In the last decade, retail distribution of independent carpets specialists have lost market share to the big multiple store groups and chains of carpet shops. Multiples of different types are now estimated to control about half of total sales, and the specialist shops 32 percent. The remaining part came from other outlets, such as furniture stores, department stores and mail-order companies. Broadloom carpet direct sales by manufacturers to the retail trade are estimated at 70 percent of the total. Wholesalers, who act as intermediaries between manufacturers and the retail trade, handled the remainder. In the distribution of imported loose floor rugs importer/wholesalers play a more important role.
Distribution in France is strongly centralised in the Paris area, and importers there often work with regional wholesalers and agents to achieve national coverage.
The website http:/www.mandelnet.com gives an overview of the French suppliers of clothing, textiles, fabrics and yarns; subcontracting etc. This site includes 15,000 Internet addresses.
Just like in other EU countries, Ikea is expanding its activities in France and is one of the leading furniture retailers in Europe, with household and furnishing textiles in its assortment. Ikea's turnover through 13 department stores in France amounted to about € 0.9 billion in 2000/2001.
Major developments in the French household and furnishing textiles retail trade in the period under review consisted of growth in sales by furniture multiples (including interior department stores) and non-specialized hyper- and supermarkets, to the detriment of independent retailers. Mail-order houses stabilized at 22 percent of the household and furnishing textiles market, while the market share of super- and

hypermarkets reached 33 percent in 2001.
Important multiples, including franchise activities for household linen, are Boutique Descamps and Carré Blanc. The major **department store** chain in France is Galerie Lafayette (99 stores), also operating under the name Nouvelles Galeries. Another important department store is Printemps (27) owned by PPR (Pinault-Printemps-Redoute). Nearly all French Marks & Spencer stores were closed in 2001.
Major **variety stores** are Prisunic/Monoprix/Inno, in total 350 outlets, owned by Galerie Lafayette.
Major **hyper- and supermarket** chains include Leclerc 370 hypermarkets and 130 supermarkets. Auchan (in total over 200 hypermarkets, 470 supermarkets and 600 convenience stores with the fascias Auchan, Mammouth and Atac), Carrefour (around 4,000 outlets in France with fascias Carrefour, Champion, Ed, etc.) and Intermarché almost 4,000 outlets of which 3,600 in France (with the hyper- and supermarket formula Intermarché, supermarkets Ecomarché and discount stores CDM).
La Redoute and 3 Suisses are well-known **mail-order companies,** both of which operate internationally.
La Redoute owned by Pinault Printemps Redoute (PPR) is market leader in textile sales by mail-order companies and includes stores, selling clothing and textiles.
Leading DIY stores are Domaxel, ANPF (both buying groups) and Kesa, owned by Kingfisher (UK).

Italy

The total number of outlets in the furniture, furnishing and household textiles trade has been estimated at about 25,000 in 2001. Retailers in the sector under review are highly fragmented and comprise a large number of independent specialist shops. The wholesale trade is very important to the retail sector as a whole and foreign manufacturers will often set up their own sales organizations or work through an exclusive importer for the market. This company may in turn sell through a network of regional wholesalers or agents. As in other markets, loose carpets and household textiles are nearly always distributed through importers, except where large multiples and department stores make direct purchases abroad.
Independent (specialized) retailers are by far the most important retail channel for household and furnishing textiles in Italy, despite the fall in market share in the last decade. About 48 percent of sales for household and furnishing textiles passed through traditional, independent shops in 2001. Ten years before, their market share was, however, over 60 percent.
Wholesalers play an important role in distribution, accounting for about 60% of the purchases by retailers. Wholesalers are generally used by manufacturers of cheaper, mass market and standardised products. Manufacturers of exclusive, higher-priced textiles sell mainly directly to retailers. Major developments in the Italian retail trade in household and furnishing textiles in the period under review were growth in sales by specialized chains, department and variety stores, to the detriment of independent retailers. It is expected that this development will be continued in the coming years.
Ikea operates with 8 stores in Italy. The major **department stores** in Italy are Coin (80) and La Rinascenta (13), owned by Gruppo Rinascenta. The Coin Gruppo owns the leading **variety stores** La Standa (220) and Oviesse (110). Gruppo Rinascenta covers variety store Upim (330).
The Italian **mail-order** market remains relatively undeveloped, primarily due to problems with distribution and the generally poor postal delivery service. Leading mail-order companies with sales in household textiles besides general goods are Postalmarket and Euronova, owned by Otto Versand Germany.
Hypermarkets grew in number, as did textiles sales by these channels. The most important supermarket chain is Rinascente. Hypermarket chains are Citta Mercato, Rinascente and Joyland. Increased sales in clothing are expected via super- and hypermarkets in the coming years, of which much can be ascribed to foreign supermarkt chains like Auchan, Carrefour and Metro.

The Netherlands

In 2001 there were estimated to be nearly 2,500 retail companies operating in household, furnishing and floor-covering textiles, of which 600 specialised wholly or partly in selling carpets and floor rugs. An estimated 90 percent of furnishing shops sells both carpets and other soft furnishings (curtains etc.) and the remaining shops sell exclusively carpets and/or floor rugs.
There are fewer than 100 specialised oriental carpet outlets. In addition to the above there are 3,800 specialist furniture and lightning stores in The Netherlands. These outlets rarely sell fitted carpet, but frequently sell floor rugs as accessory items to their furniture ranges. The number of outlets of department and variety store chains is 440.

Euretco and Intres are two major buying groups in The Netherlands, both operating in several branches. Euretco operates in the furniture/furnishing section with the formula: Profijt Meubel (37 outlets) and Happy the Furniture Company (20) and the furnishings formula Vivante (34), also in the household linen sector with 45 outlets under the name Goed Idee. Intres is active with the furniture/furnishing formula: Woonflair (67 outlets), City Meubel (19); Studio (9); Woonfacet (27); Garant meubel (48); Novastyl (29); Runner% (14); Woonsfeer (110) and Woonservice Winkels (39) and the household linen formulas Lin-O-Lux (55), while bed textiles are part of the assortment of the formulas Morgana (20); Slaapgilde (27); Nachtwacht (16) and Sleepy (17 outlets in Belgium and 5 in The Netherlands).

Trendhopper is a franchise organization with 52 outlets; another buying/selling organization in the furniture sector is Topform with 32 members.
The most important carpet and furnishing chains are Carpetland (63 stores), Roobol Woontextiel (42), Tapijtcentrum Nederland (24), Ben de Graaff Tapijt (10). There is one chain of specialist shops selling oriental carpets: Perez (10 outlets) owned by Janssens Orient carpets, an importer of hand-knotted carpets.
Discount chains active in selling carpet and floor rugs include Leen Bakker and Kwantum. Both have a very broad assortment including household textiles, curtains, lightning, furniture etc. besides curtains and floor coverings and operate at the lower end of the market.
Other discounters but without floor coverings in their assortment are the **discounters in textiles** (often indicated as textile supermarket). Important textile supermarkets are Zeeman Textielsupers with 369 outlets in The Netherlands and 166 abroad (Germany, Belgium and France), Wibra with 188 outlets in The Netherlands and 45 in Belgium, Hans Textiel & Mode (130 outlets), Bentex (39 outlets, part of Macintosh) and Henk ten Hoor Textiel (55 outlets). Their market shares vary strongly per product group, their focus being more on undergarments and textile articles.
Most household textile products are part of the assortment of the above-mentioned textile discounters.
There are two **department stores** of importance, Vroom & Dreesman and De Bijenkorf. Both sell only floor rugs (but no fitted carpets) besides curtains and household textiles. The former operates in the middle of the market with 70 stores. De Bijenkorf has 10 high quality stores with modern medium to up-market merchandise: the floor rug department carries a wide range of different styles and types, but concentrates on trendy fashionable design and colours. V&D operates in the middle of the market with 68 outlets of different sizes and sells household and furnishing textiles.
The **variety store** Hema has 274 sales outlets, of which 23 in Belgium and intends to expand in Germany.
All articles (including household textiles and curtains) are sold under private label. Marks & Spencer closed their stores in The Netherlands.
Interior department stores like Ikea (from Sweden) with 10 outlets, like in other countries located outside traditional city shopping centres or even furniture centres, is run on a self-service basis and offers low-priced reasonably fashionable furniture and furnishing for the whole house (living, sleeping, bathroom, kitchen etc.).
Trendhopper is active in more or less the same segment like Ikea.
Due to the extended network of retail shops in The Netherlands, **mail-order companies** have a much lower market share than most other EU countries.
Mail-order houses operate mainly in the middle ranges as regards price, quality and fashion. The most important companies are Wehkamp, Otto Nederland (part of Otto Versand from Germany), Neckermann Postorders, Quelle (both part of the German Karstadt/Quelle) and La Redoute (from France).
The main activities of grocery **supermarkets** are in the provisions sector. Super- and hypermarkets mainly have low-priced household textiles in their assortment.
Supermarket chains are Albert Heijn, Aldi, Vomar, and Edah, of which market share of the German originated Aldi is highest. The usual distribution channels of these companies are direct imports, wholesalers and service merchandisers.
An important part of the category '**Other**' is taken by the Makro, a wholesaler with retail activities.
Others include also street markets and factory outlets.
Companies in this category (with the exception of the Makro) are not themselves involved in importing.

The other major distribution channel in the higher priced segments is the specialized independent stores.
This group includes, for an important part, members of buying corporations.
The role of department stores in distribution of household textiles (**excluding** bed textiles) is more dominant than in the case of bed textiles. Despite a slight decline in recent years more than a third came from this channel. The role of textile discounters is also more important with a market share of 21 percent in volume for household textiles and 12 percent for bed textiles.
Distribution of curtains is controlled by three major channels: furniture and furnishing chains (more than a third of sales, with prices under the average), department and variety stores (a quarter of sales with prices just under the average) and the specialized independent stores (also a quarter of sales but with prices far above the average).
About 260 wholesalers are active in imports in The Netherlands in the household, furnishing and floor-covering textiles sector, of which 80 wholesale companies have 10 or more employees. About 60% of the buying potential of the retail companies is covered by wholesalers in the household linen sector. A list of the major Dutch wholesalers in household, furnishing and floor-covering textiles is given in appendix 12.

7.7 Distribution channels for developing country exporters

No general advice can be given to exporters in developing countries in the choice of the most suitable distribution channel. Buyers' requirements vary in terms of volume, fashion risk, quality, delivery times, frequency of orders etc. while suppliers' opportunities depend on production capacity, technical equipment and organizational skills, creative (design and styling) capabilities, marketing know-how, supply of materials etc.
Most of the major retail organizations set up their own buying organizations in low-labour-cost countries.
This means that retailers are able to bypass domestic wholesalers and/or manufacturers. More specified

information concerning distribution in the major EU countries is given in point 7.6.
Unorganised independent retailers, with decreasing market shares in most of the EU countries, buy directly from local or near-by manufacturers or agents representing these manufacturers, as well as from wholesalers/importers.
Most independent retailers are organised via franchise, selling formula or buying groups. The original function of the buying groups was reduction in costs by centralising of buying and logistics. More and more selling formula for the members is being developed and the successful ones have been exploited as franchising activities. In particular in Germany and The Netherlands, buying groups play a significant role for specialised independent retailers. The buying policy of buying groups becomes more and more similar to that of multiple stores or chains.
Department stores often combine a wide range covering hardware and garments of branded goods and private labels (own assortment).
Contrary to buyers at clothing multiples, mail-order companies and variety stores, which have mainly or exclusively private labels in their assortment, divide their budgets between the purchase of finished products via direct imports from low-wage countries and sub-contracting to local or foreign companies.
Consumers' expectations with regard to lower prices, in particular, and tough competition in general have resulted in the retailer's needs for lower inventories, less out of stock and lower markdowns.
The choice of the most suitable distribution channel is part of a clear strategy for a particular target market.
It should be realised that the description above constitutes a mere indication of a far more complex reality. For that reason we refer to the EU Strategic Marketing Guide, which will assist you with the analysis of this information.

8 PRICES AND MARGINS

8.1 Margins

As a rule, importers who import from developing countries are looking for low-priced merchandise. The margins at the various different levels of distribution are influenced by six factors and are different for each product/market combination. These factors are:

- degree of risk (new fashion/design or 'me-too' product, new or known source etc.);
- volume of business;
- functions or marketing services rendered;
- general economic conditions (booming or depressed business);
- existence/availability of competitive products; and,
- exclusiveness of the product.

High-risk, low-volume, service-intensive products require different margins to low-risk, high-volume standard products. It is impossible to draw up a schedule of actual margins for each and every product/market combination. Even within the same type of combination, different importers employ different margins, due to variation in economic conditions.
The typical rate of commission paid to an agent is 10 percent of sales, though this can be as low as 8 percent for volume business and much higher for exclusive deals.

Table 8.1 Calculation schedule: margins

	Low	Medium	High
CIF Rotterdam/Amsterdam	100	100	100
Import duties	*	*	*
Charges on CIF basis:			
– handling charges, transport/ insurance and banking services	6	6	6
	106	106	106
Wholesaler's margin (20/25/30%)	21	27	32
	127	133	138
Retailer's margin (50/60/70%)	64	80	97
– net selling price	191	213	235
Value Added Tax:			
19% of net selling price **)	36	40	45
– gross selling or consumer price	227	253	280
RATIO CIF/ CONSUMER PRICE:	**2.3**	**2.5**	**2.8**

*) vary from 0 until 12.4% of CIF value
**) In practice, retailers calculate a 90-120% mark-up, incl. VAT and an important part of the assortment has been reduced in price.

The effect of low, medium and high margins on the final consumer price, calculated from one CIF price for three different products, is shown in table 8.1. A ratio of between 2.3 and 2.8 should be used to calculate an appropriate final consumer price. Because of factors like increasing competition at all levels in the distribution column and further concentration and integration, the ratio has decreased considerably in the past decade.

It is generally more attractive for an exporter to operate in the medium and high market. Margins vary greatly according to both type of product and retail channel. The average textiles retailer marks goods up by 80-110 percent of his buying price, with selected goods retailing up to 140 percent higher than buying prices. In grocery stores, small textile articles achieve a gross margin of 20-30 percent of the retail selling price. This figure is highly attractive compared with the typical profit margin on food and other grocery lines. In addition, these products often have the advantage that manufacturers supply display stands and take responsibility for stocking them.
With regard to the distribution of loose floor rugs the average mark-up by retail shops is about 100 percent. As indicated above for carpets, a number of different factors can affect the actual level of this mark-up. Importer/wholesaler margins used to average around 30 percent, but, because of oversupply and the resulting price competition, margins have come under pressure and are now often only 20 to 25 percent.

8.2 Retail prices

The market is intensively competitive and prices vary widely according to the product and type of outlet. Below, we give an overview of retail prices in The Netherlands in euro/€. Retail prices, including VAT (19%) are given for autumn 2002. The assortment for discounter Zeeman and variety store Hema is limited. Speciality stores and department stores like De Bijenkorf have more extensive ranges, with higher priced branded goods. For this reason, maximum prices are not (always) given in the relevant column.

8.3 Sources of price information

Consumer prices

Travelling to the centres of style gives a comprehensive view of trends and prices. Shopping in European cities like London and Paris and to a lesser degree Amsterdam will provide a good insight.
Another indication of prices of household, furnishing and floor-covering textiles being sold in the major EU countries can be formed by browsing through the catalogues of mail-order houses and department stores, which can be found on Internet. For instance in

Table 8.2 Overview of retail prices (including VAT) of some selected products of household textiles in The Netherlands (in €)

	Zeeman	Hema	V&D	De Bijenkorf	Ikea
Sheets for:					
- single bed	9.00-11.00	13.50	15.50-17.00	17.00-	15.00
- double bed	11.50-14.00	18.00	20.50-25.00	22.00-	20.00
Pillowcases (50x60 cm)	2.30	2.70	5.45	6.35-	2.90
Quilt cover set for:					
- single bed (140x200 cm)	8.65	17.70-22.30	22.30-35.90	26.80-75.00	8.90-29.00
- double bed (200x220 cm)	17.70-22.30	22.30-40.50	35.90-68.00	45.45-135.00	25.00-39.00
Bathroom and kitchen linen:					
Hand towel (50x100 cm), uni	3.15	4.50	6.80	9.00-	4.90
Bathroom/beach towel	5.90-7.70	9.00	11.35	15.90-	11.00
Kitchen towel (50x50 cm)	1.15-2.25	2.70	3.60-5.00	6.80-	2.80
Guest towel (30x50 cm)	1.10-1.40	1.55	1.80-2.25	5.45-	-
Washing glove (15x20 cm)	0.55	0.90	0.90-2.25	2.70-	1.00
Tea towel (50x70)	0.90-1.80	2.25	3.15-4.50	5.90-	1.95

http://www.neckermann.de; http://www. wehkamp.nl; http://www.otto.de; http://www.laredoute.fr. All prices in these catalogues are given in euros (€). Interesting websites including hand-knotted and hand-woven carpets completed with pictures, description and prices can be found on: *http://www.teppich-kibek.de* and *http://www.channicarpets.com*

Trade prices

Checking prices quoted at trade fairs offers another opportunity to gather information. Trade fairs are discussed in the relevant chapter of the EU Strategic Marketing Guide.

9 OPPORTUNITIES FOR DEVELOPING COUNTRY EXPORTERS

Opportunities for exporters
As described in the previous chapters, the expectations for expenditure on household, furnishing textiles and to a lesser degree for broadloom carpets (due to the popularity of other materials for floor covering) for the period 2003-2004 are optimistic, for several reasons like demographic developments and growing interests of consumers in interiors.
Developments in the retail sector, like a wide availability of household textiles at competitive prices and a growing concentration at retail level, lead to an increased demand for fashionable products against low prices, while developments in EU production lead to a further sourcing of basic products in low-cost countries and, probably, of products with a higher design content. The largest middle range market segment may offer good opportunities.
The decline of domestic manufacturing has led to a more internationally oriented trade in textiles.
The keen competition on the EU market will steadily increase and this leads to further possibilities for exporters in low-cost countries.
The role of wholesalers/importers will remain stable, while the role of multiples and, to a lesser degree, buying groups or franchise formula, will slightly increase in the coming years. The buying policies of super- and hypermarkets vary from direct imports by the internationally operating chains to buying from wholesalers/importers.
The best selling ranges of rugs, bed linen and cotton towelling are the result of very close co-operation between designers in EU countries and factories in producing countries.

Threats and difficulties for exporters
Production capacity, keen pricing and fast delivery are needed to establish reliable relationships with importers. Good communication, flexibility and perfectionism are vital.
Innovations in current items and development of new items are frequently required in order to maintain the interest of demanding and changing tastes of consumers. Good knowledge of the market is essential.
Competition is intense in the household, furnishing and floor-covering textiles market and amateurism loses out to professionalism.

Advice to exporters
A start, which involves limited risks and is chosen by the majority of exporters in developing countries, is to try to acquire fixed orders for products specified by the client. The latter is at home in his market and knows all the “ins and outs” of his permanently changing market place.

The importer/wholesaler route is possibly the safest and most effective first approach to exporting. Basically the importer/wholesaler, who is familiar with the user market, can supply a considerable amount of information and guidance to the overseas manufacturer, like knowledge of the legal, technical, quality and fashion aspects. He can provide designs and patterns, arrange the administration of import/export procedures, stockholding in the buyer country, finance and responsible for returns from the final customer.
Obviously, in return for these services, he will require a considerable mark-up to be able to operate.
Importers who buy for their own account can be a very effective means to gain distribution.
The importers/wholesalers ‘and also the other importers’ (like organised retailers) desired time between buying and selling has to be shorter.
This shorter lead-time is necessary to meet the demands set by changing fashions. The most important determining factors for importers are the combination of price, product quality and reliability of deliveries and delivery times.
Some experts are of the opinion that instead of concentrating on increasing volumes, developing countries should shift production profiles to higher-value products. Another point of view, however, suggests to specialise based on experience and to try to obtain a higher degree of efficiency in production. It is evident that both production strategies have to be combined with the recommendations mentioned earlier.
Companies in developing countries, which are continually adapting new technologies and have the advantage of low production costs, have definite advantages.
As mentioned above, exporters of the household, furnishing and floor-covering textiles are confronted with many aspects like quality, sizing, packaging, environmental aspects, resulting in a lot of technical requirements, added to which are aspects of design, fashionability, market developments etc. For that reason, co-operation in a variety of forms between importer and exporter can be necessary, of which the more further-reaching forms of potential co-operation are joint ventures and co-makership agreements.

APPENDIX 1 DETAILED CLASSIFICATION OF HOUSEHOLD, FURNISHING AND FLOOR-COVERING TEXTILES, BY HARMONIZED SYSTEM CODE

HS Code	Product description
	Carpets and textile floor coverings
	Knotted carpets
5701.10.100	wool or fine animal hair, containing > 10% of silk by weight
10.910	wool or fine animal hair, comprising up to 350 rows of knots per metre of warp
10.930	wool or fine animal hair, comprising 350-500 rows of knots per metre of warp
10.990	wool or fine animal hair, comprising > 500 knots per metre of warp
90.100	silk, schappe, synthetic fibres or metallised yarn
90.900	other textile materials
	Woven carpets
5702.10.000	Kelims, sumaks, karamanies and similar hand-woven carpets
20.000	Woven floor coverings of coir
	Woven carpets of pile construction
5702.31.000	of wool or fine animal hair, not made-up
32.000	of man-made textile materials, not made-up
39.100	loose carpets of cotton, not made-up
39.900	loose carpets of vegetable textile materials or coarse animal hair, not made-up
41.000	loose carpets of wool or fine animal hair, made-up
42.000	loose carpets of man-made materials, made-up
49.100	loose carpets of cotton, made-up
49.900	loose carpets of vegetable textile materials or coarse animal hair, made-up
	Flat woven carpets (not of pile construction)
5702.51.000	of wool or fine animal hair, not made-up
52.000	of man-made textile materials, not made-up
59.000	of vegetable textile materials or coarse animal hair, not made-up
91.000	of wool or fine animal hair, made-up
92.000	of man-made textile materials, made-up
99.000	of vegetable textile materials or coarse animal hair, made-up
	Tufted carpets
5703.10.000	carpets of wool or fine animal hair
20.110	tiles of nylon or other polyamides, with an area of $\leq 0.3\ m^2$, printed
20.190	printed carpets of nylon or other polyamides
20.910	non-printed carpet tiles of nylon or other polyamides, with an area of $\leq 0.3\ m^2$
20.990	non-printed carpets of nylon or other polyamides
30.110	carpet tiles of polypropylene, with an area of $\leq 0.3\ m^2$
30.190	carpets of polypropylene, excl. tiles of $\leq 0.3\ m^2$
30.510	other printed carpet tiles of man-made textile materials, with an area of $\leq 0.3\ m^2$
30.590	other printed carpets of man-made textile materials
30.910	other non-printed carpet tiles of man-made textile materials, with an area of $\leq 0.3\ m^2$
30.990	other non-printed carpets of man-made textile materials
90.100	carpet tiles of vegetable textile material or coarse animal hair, with an area of $\leq 0.3\ m^2$
90.900	other carpets of vegetable textile material or coarse animal hair
	Felt carpets
5704.10.000	felt floor tiles with an area of $\leq 0.3\ m^2$
90.000	other felt carpets

	Other carpets
5705.00.100	other carpets of wool or fine animal hair (excl. 5701/5702/5703)
00.310	other carpet tiles of man-made textile materials (excl. 5701/5702/5703), with an area of ≤ 0.3 m^2
00.390	other carpets of man-made textile materials (excl. 5701/5702/5703)
00.900	other carpets of vegetable textile materials or coarse animal hair (excl. 5701/5702/5703)
	Household and furnishing textiles
	Blankets:
63.01.20.100	knitted; wool and hair
20.910	woven; wool and hair
20.990	woven; wool
30.100	knitted; cotton
30.900	woven; cotton
40.100	knitted; synthetics
40.900	woven; synthetics
90.100	knitted; other materials
90.900	woven; other materials
	Bed linen;
6302.10.100	knitted; cotton
10.900	knitted; other materials
21.000	woven/printed; cotton
22.100	non-woven/printed; synthetics
22.900	woven/printed; synthetics
29.100	woven/printed; flax or ramie
29.900	woven/printed; other materials
31.100	woven/not printed; cotton with flax
31.900	woven/not printed; cotton
32.100	non-woven/not printed; synthetics
32.900	woven/not printed; synthetics
39.100	woven/not printed; flax
39.300	woven/not printed; ramie
39.900	woven/not printed; other materials
	Table linen;
6302.40.000	knitted
51.100	woven; cotton with flax
51.900	woven; cotton
52.000	woven; flax
53.100	non-woven; synthetics
53.900	woven; synthetics
59.000	woven; other materials
	Bathroom and kitchen linen
6302.60.000	towelling; cotton
91.100	woven; cotton with flax
91.900	woven; cotton
92.000	woven; flax
93.100	non-woven; synthetics
93.900	woven; synthetics
99.000	woven; other materials
	Curtains
6303.11.000	knitted; cotton
12.000	knitted; synthetics
19.000	knitted; other materials

91.000	woven; cotton
92.100	non-woven; synthetics
92.900	woven; synthetics
99.100	non-woven; other materials
99.900	woven; other materials
	Bedspreads
6304.11.000	knitted
19.100	woven; cotton
19.300	woven; flax or ramie
19.900	woven; other materials
	Other furnishing articles
6304.91.000	knitted
92.000	woven; cotton
93.000	woven; synthetics
99.000	woven; other materials

APPENDIX 2 EU TRADE IN HOUSEHOLD, FURNISHING AND FLOOR-COVERING TEXTILES

Appendix 2.1 EU imports of household, furnishing and floor-covering textiles, 1999-2001

	1999		2000		2001	
	tons	€ '000	tons	€ '000	tons	€ '000
Knotted carpets						
- of wool or hair with:						
- >10% silk by weight	907	17,944	954	22,816	1,437	28,805
- < 350 rows of knots per metre of warp	28,335	227,204	24,736	219,720	23,797	203,183
- 350-500 rows of knots p/mtr of warp	25,656	454,807	25,403	465,018	20,414	410,831
- > 500 rows of knots p/mtr of warp	4,399	89,613	4,089	85,754	3,544	78,485
- of silk, synthetic fibres or metal yarns	1,245	54,132	890	58,884	735	59,812
- of other textile materials	1,896	15,270	2,553	17,266	2,376	17,085
Total knotted carpets	**62,438**	**858,970**	**58,625**	**869,458**	**52,303**	**798,201**
of which from:						
- outside the EU	58,650	766,234	54,850	773,391	49,159	714,352
- developing countries	57,624	753,264	53,911	763,065	48,350	703,601
Woven carpets						
Kelims, sumacs and similar handwoven	21,190	60,649	9,627	58,144	7,705	53,222
Coir	21,928	48,225	20,613	47,519	20,160	46,643
Total woven carpets	**43,118**	**108,874**	**30,240**	**105,663**	**27,865**	**99,865**
of which from:						
- outside the EU	23,766	74,090	22,011	71,729	21,143	65,858
- developing countries	23,267	69,837	21,642	68,852	20,823	63,256
Woven carpets of pile construction						
- of wool or fine animal hair, made-up	5,627	83,783	5,459	81,265	5,823	86,234
- of man-made textiles, made-up	12,486	54,602	55,559	67,309	58,701	70,977
- loose carpets of cotton, made-up	3,078	13,865	3,291	16,872	2,312	16,158
- loose carpets of vegetable textiles etc., made-up	1,903	11,253	2,976	16,013	2,124	12,965
- loose carpets of wool or hair, not made-up	11,389	96,919	9,705	96,820	12,517	115,174
- loose carpets of man-made textiles, not made-up	44,615	211,259	44,600	219,807	41,512	203,764
- loose carpets of cotton, not made-up	2,757	16,908	2,811	18,135	3,916	24,105
- loose carpets of vegetable textiles, not made-up	2,517	12,637	2,435	13,460	2,499	12,458
Total woven carpets of pile construction	**84,372**	**501,226**	**126,836**	**529,681**	**129,404**	**541,835**
of which from:						
- outside the EU	19,020	98,754	21,720	116,866	25,134	130,362
- developing countries	14,432	64,920	17,316	80,798	19,936	91,399
Flat woven carpets						
- of wool or fine animal hair, not made-up	308	3,395	231	2,931	375	3,256
- of man-made textile materials, not made-up	1,921	9,829	1,991	10,051	1,384	8,947
- of vegetable textile materials, not made-up	4,534	20,470	3,134	17,203	3,456	16,686
- of wool or fine animal hair, made-up	3,436	18,655	4,058	22,977	5,897	32,073
- of man-made textiles, made-up	5,838	25,387	6,109	29,634	5,930	31,179
- of vegetable textiles etc. , made-up	24,533	87,494	26,059	95,564	25,276	94,922
Total flat woven carpets	**40,570**	**165,230**	**41,582**	**178,360**	**42,318**	**187,063**
of which from:						
- outside the EU	28,338	92,471	28,913	97,726	30,070	103,349
- developing countries	26,369	80,156	26,423	82,595	27,663	90,091

continued

Appendix 2.1 Continue

		1999		2000		2001	
		tons	€ '000	tons	€ '000	tons	€ '000
Tufted carpets							
- of wool or fine animal hair		30,995	165,969	34,605	195,802	36,367	216,574
- tiles of nylon etc. , ≤ 0.3 m^2, printed		1,323	7,406	1,462	9,031	1,349	9,132
- of nylon etc., printed		131,368	345,679	125,479	342,901	101,334	334,893
- tiles of nylon etc., ≤ 0.3 m^2, non-printed		40,367	139,633	45,128	161,744	46,780	170,330
- of nylon etc., non-printed		99,300	520,868	93,990	480,150	95,264	455,917
- tiles of polypropylene, of ≤ 0.3 m^2		14,679	30,276	16,356	33,029	13,445	29,764
- other of polypropylene, of ≤ 0.3 m^2		156,382	377,527	153,876	422,217	151,806	430,760
- tiles of man-made textiles, of ≤ 0.3 m^2, printed		497	1,781	362	1,784	380	1,625
- other of man-made textile, printed		11,132	38,477	8,943	34,768	8,408	31,622
- tiles of man-made text. of ≤ 0.3 m^2 non-printed		543	4,780	426	3,767	282	2,022
- other of man-made textiles, non-printed		57,416	222,072	50,505	213,245	54,086	203,273
- tiles of vegetable textiles etc.		8,784	51,022	7,600	46,698	9,401	53,727
Total tufted carpets		**552,786**	**1905,490**	**538,732**	**1945,136**	**518,902**	**1939,639**
of which from:							
- outside the EU		47,728	196,849	55,952	236,567	55,724	241,615
- developing countries		18,850	78,354	20,590	91,965	22,596	94,771
Felt carpets							
- tiles of ≤ 0.3 m^2		7,583	16,750	8,642	19,417	5,274	13,345
- other felt carpets		79,976	208,770	75,420	227,081	75,921	208,840
Total felt carpets		**87,559**	**225,520**	**84,062**	**246,498**	**81,195**	**222,185**
of which from:							
- outside the EU		11,634	46,882	13,112	51,349	15,771	55,685
- developing countries		147	414	408	909	496	1,026
Other carpets							
- of wool or fine animal hair		2,233	20,924	2,218	20,825	2,420	21,819
- of man-made textiles		17,904	79,182	16,967	93,214	18,003	93,512
- of vegetable textile materials etc.		13,990	61,869	15,108	66,128	15,782	65,921
Total other carpets		**34,127**	**161,975**	**34,293**	**180,167**	**36,205**	**181,252**
of which from:							
- outside the EU		15,442	54,898	17,147	71,306	20,531	82,181
- developing countries		10,408	35,427	12,497	43,939	15,691	55,394
Blankets							
Knitted	- wool and hair	315	2,620	342	4,296	332	3,386
	- cotton	306	3,304	827	6,544	602	5,290
	- synthetic	4,025	20,753	5,232	31,737	6,481	39,391
	- other materials	79	637	156	913	459	2,153
Woven	- wool and hair	1,975	28,516	1,628	25,711	2,977	31,115
	- wool	818	6,918	835	7,479	1,014	9,650
	- cotton	4,431	26,148	3,625	30,442	4,441	33,191
	- synthetic	13,948	80,820	13,688	82,933	16,850	89,548
	- other materials	2,727	14,407	3,434	17,965	4,203	21,472
Total blankets		**28,624**	**184,123**	**29,767**	**208,020**	**37,359**	**235,196**
of which from:							
- outside the EU		16,315	88,960	18,756	109,050	23,303	131,367
- developing countries		12,351	54,630	14,802	73,044	19,109	97,519

continued

Appendix 2.1 Continue

		1999		2000		2001	
		tons	€ '000	tons	€ '000	tons	€ '000
Bed linen							
Knitted	- cotton	37,939	257,033	40,560	273,082	41,419	281,483
	- other materials	2,145	14,695	2,907	20,674	3,617	23,387
Woven/printed	- cotton	73,290	555,225	79,602	633,883	81,710	646,025
	- synthetic	21,628	156,182	22,061	179,754	24,240	181,322
	- flax or ramie	56	1,419	55	1,476	67	1,387
	- other materials	665	6,469	608	6,539	666	5,843
Non-woven/printed	- synthetic	414	2,493	550	3,152	228	1,902
Woven/not printed	- cotton with flax	798	9,196	1,160	11,324	1,983	14,220
	- cotton	52,636	371509	55,218	400,396	59,359	424,818
	- synthetic	10,000	83,,167	11,981	107,387	11,871	98,215
	- flax	286	6,366	237	6,009	264	7,040
	- ramie	25	178	33	463	130	859
	- other materials	1,449	11,196	1,653	15,005	2,034	19,112
Non-woven/not printed	- synthetic	687	4,314	818	6,213	1,142	7,383
Total bed linen		**202,018**	**1479,442**	**217,443**	**1665,357**	**228,730**	**1712,996**
of which from:							
- outside the EU		142,260	924,144	159,128	1083,520	163,303	1110,036
- developing countries		113,709	707,568	123,813	824,989	127,440	847,794
Bedspreads							
Knitted		803	7,365	462	3,758	729	4,936
Woven	- cotton	13,245	78,976	15,155	95,120	15,915	95,906
	- flax or ramie	42	2,636	63	2,914	63	2,883
	- other materials	4,419	30,221	4,377	33,163	4,674	34,083
Total bedspreads		**18,509**	**119,198**	**20,057**	**134,955**	**21,381**	**137,808**
of which from:							
- outside the EU		12,345	69,665	14,174	85,490	15,354	88,140
- developing countries		12,172	67,608	13,790	82,560	14,660	82,656
Table linen							
Knitted		2,156	16,968	2,623	19,938	2,626	18,095
Woven	- cotton with flax	1,952	18,426	1,708	18,268	1,402	16,750
	- cotton	30,694	259,694	27,657	266,121	26,499	242,992
	- flax	1,381	24,244	1,609	30,218	1,400	27,367
	- synthetic	6,391	89,703	8,806	121,837	8,819	120,250
	- other materials	995	15,648	1,442	20,473	1,448	19,891
Non-woven synthetic		979	6,235	980	6,301	765	4,581
Total table linen		**44,548**	**430,918**	**44,825**	**483,156**	**42,959**	**449,926**
of which from:							
- outside the EU		30,465	302,993	33,909	351,145	31,179	320,550
- developing countries		24,511	236,165	26,827	276,492	24,926	254,009

continued

Appendix 2.1 Continue

		1999		2000		2001	
		tons	**€ '000**	**tons**	**€ '000**	**tons**	**€ '000**
Bathroom and kitchen linen							
Towelling	- cotton	119,383	841,046	129,559	993,936	144,240	969,425
Woven	- cotton with flax	2,719	18,448	3,085	21,040	3,933	26,599
	- cotton	26,685	146,605	32,719	156,094	24,124	141,678
	- flax	1,645	13,550	1,325	17,695	1,171	10,577
	- synthetic	678	4,053	752	5,276	865	6,203
	- other materials	596	6,449	778	8,560	953	9,528
Non-woven	- synthetic	1,244	9,079	2,834	11,211	1,470	11,527
Total bathroom and kitchen linen		**152,950**	**1039,230**	**171,052**	**1213,812**	**176,756**	**1175,537**
of which from:							
- outside the EU		101,300	607,524	110,076	690,195	110,724	707,156
- developing countries		86,662	510,025	94,113	589,665	97,290	607,449
Curtains							
Knitted	- cotton	1,384	13,645	1,531	15,526	1,201	11,905
	- synthetic	7,134	70,338	8,190	77,620	8,260	87,057
	- other materials	809	10,454	976	11,544	974	11,962
Woven	- cotton	21,629	207,844	24,481	234,018	25,800	243,082
	- synthetic	14,338	189,069	17,565	222,037	20,974	252,944
	- other materials	2,843	34,266	3,111	42,657	3,800	48,537
Non-woven	- synthetic	1,233	24,595	1,479	28,391	1,220	24,964
	- other materials	49	454	66	542	48	640
Total curtains		**49419**	**550665**	**57399**	**632335**	**62277**	**681,091**
of which from:							
- outside the EU		34,410	317,162	42,151	392,073	45,562	427,108
- developing countries		22,005	202,884	27,631	254,302	31,357	284,497
Other furnishing articles							
Knitted		3,371	36,297	4,433	47,243	4,611	44,423
Woven	- cotton	29,596	134,687	21,323	145,794	20,126	162,741
	- synthetic	10,238	85,749	12,852	93,845	15,706	131,817
	- other materials	6,082	78,442	5,876	73,422	5,783	70,520
Total other furnishing articles		**49,287**	**335,175**	**44,484**	**360,304**	**46,226**	**409,501**
of which from:							
- outside the EU		24,178	201,339	31,102	260,490	33,886	283,633
- developing countries		18,985	161,827	24,565	207,637	27,612	235,053
Total imports		**1450,325**	**8066,036**	**1499,397**	**8752,902**	**1503,880**	**8772,095**
of which from:							
- outside the EU		565,853	3841,965	623,001	4390,897	643,843	4461,392
- developing countries		441,494	3023,079	478,328	3440,812	500,942	3508,565

Source: Eurostat

Appendix 2.2 EU exports of household, furnishing and floor-covering textiles, 1999-2001

	1999		2000		2001	
	tons	€ '000	tons	€ '000	tons	€ '000
Knotted carpets						
- of wool or hair						
- with >10% silk by weight	867	15,416	1,418	16,480	1,419	16,495
- < 350 rows of knots p/mtr of warp	2,242	43,776	2,232	40,052	2,378	42,105
- 350-500 rows of knots p/mtr of warp	2,219	58,427	2,526	68,137	2,637	70,929
- > 500 rows of knots p/mtr of warp	378	14,532	369	16,395	382	16,474
- of silk, synthetic fibres or metal yarns	99	10,419	140	14,905	143	15,080
- of other textile materials	1,112	8,653	656	8,498	662	8,569
Total knotted carpets	**6,917**	**151,223**	**7,341**	**164,467**	**7,621**	**169,652**
of which to outside the EU	3,586	64,489	4,085	81,489	3,374	74,109
Woven carpets						
Kelims, sumacs and similar hand-woven	1,812	15,270	1,264	16,878	1,489	17,171
Coir	2,770	22,652	3,167	21,277	3,243	22,368
Total woven carpets	**4,582**	**37,922**	**4,431**	**38,155**	**4,732**	**39,539**
of which to outside the EU	1,917	9,716	1,774	12,452	1,933	9,690
Woven carpets of pile construction						
- of wool or fine animal hair, made-up	6,188	146,935	6,523	157,907	6,580	159,106
- of man-made textiles, made-up	6,129	80,388	9,121	108,135	9,184	106,659
- loose carpets of cotton, made-up	1,008	9,300	448	10,207	448	10,384
- loose carpets of vegetable textiles etc., made-up	1,937	13,220	2,756	18,492	2,736	18,101
- loose carpets of wool or hair, not made-up	9,762	210,701	9,466	200,977	9,558	210,030
- loose carpets of man-made textiles, not made-up	82,055	445,633	92,030	516,473	93,275	526,215
- loose carpets of cotton, not made-up	790	12,596	736	12,668	738	13,065
- loose carpets of vegetable textiles, not made-up	793	14,252	942	15,884	960	16,004
Total woven carpets of pile construction	**108,662**	**933,025**	**122,022**	**1040,743**	**123,479**	**1059,564**
of which to outside the EU	85,382	410,183	103,510	488,387	104,419	498,461
Flat woven carpets						
- of wool or fine animal hair, not made-up	360	5,968	588	8,510	590	8,531
- of man-made textile materials, not made-up	266	4,079	345	3,980	348	4,030
- of vegetable textile materials, not made-up	1,890	21,443	2,013	19,481	2,048	19,785
- of wool or fine animal hair, made-up	772	11,505	1,058	13,322	1,060	13,660
- of man-made textiles, made-up	2,913	25,516	4,170	30,781	4,193	30,786
- of vegetable textiles etc. , made-up	5,738	46,574	6,365	46,861	6,602	48,547
Total flat woven carpets	**11,939**	**115,085**	**14,539**	**122,935**	**14,841**	**125,339**
of which to outside the EU	6,082	33,830	7,172	41,094	6,821	41,508

continued

Appendix 2.2 Continue

	1999		2000		2001	
	tons	**€ '000**	**tons**	**€ '000**	**tons**	**€ '000**
Tufted carpets						
- of wool or fine animal hair	8,202	154,934	9,780	190,208	10,972	196,862
- tiles of nylon etc. , ≤ 0.3 m^2, printed	1,731	8,439	1,794	9,454	1,808	9,680
- of nylon etc., printed	98,359	579,812	96,046	609,000	105,859	610,797
- tiles of nylon etc., ≤ 0.3 m^2, non-printed	26,285	182,090	30,783	208,071	30,796	208,,229
- of nylon etc., non-printed	90,247	755,,930	91,864	693,169	92,983	704,905
- tiles of polypropylene, of ≤ 0.3 m^2	6,371	38,357	7,683	37,281	7,697	37,279
- other of polypropylene, of ≤ 0.3 m^2	42,969	467,742	44,187	524,885	45,556	519,939
- tiles of man-made textiles, of ≤ 0.3 m^2, printed	8	37	24	65	24	65
- other of man-made textile, printed	1,762	28,915	3,202	36,575	3,231	36,681
- tiles of man-made text. of ≤ 0.3 m^2, non-printed	667	1,546	449	1,158	449	1,158
- other of man-made textiles, non-printed	10,824	178,349	8,303	166,608	8,432	167,569
- tiles of vegetable textiles etc.	4,724	58,362	2,835	50,422	2,887	51,543
Total tufted carpets	**292,149**	**2454,513**	**296,950**	**2526,896**	**310,694**	**2544,707**
of which to outside the EU	153,178	391,290	168,920	443,046	213,644	446,182
Felt carpets						
- tiles of ≤ 0.3 m^2	16,098	40,658	13,437	39,611	13,668	39,978
- other felt carpets	66,687	296,262	71,192	313,759	73,979	321,027
Total felt carpets	**82,785**	**336,920**	**84,629**	**353,370**	**87,647**	**361,005**
of which to outside the EU	62,114	98,482	62,899	108,303	61,240	103,112
Other carpets						
- of wool or fine animal hair	4,181	33,998	3,219	32,114	3,237	32,351
- of man-made textiles	24,228	115,139	19,391	99,083	19,633	101,077
- of vegetable textile materials etc.	10,492	52,833	14,881	72,323	15,096	72,881
Total other carpets	**38,901**	**201,970**	**37,491**	**203,520**	**37,966**	**206,309**
of which to outside the EU	13,509	65,989	14,662	75,024	13,360	78,127
Blankets						
Knitted - wool and hair	390	5,065	577	5,986	369	6,119
- cotton	226	2,604	201	2,994	239	2,501
- synthetic	3,762	29,325	5,443	39,634	12,367	42,604
- other materials	31	273	28	331	110	587
Woven - wool and hair	1,221	27,508	1,748	31,890	1,222	29,516
- wool	1,362	13,815	878	11,145	787	9,942
- cotton	2,208	24,838	2,972	32,839	3,008	37,155
- synthetic	12,364	82,911	11,196	84,621	10,094	78,355
- other materials	2,466	13,992	3,425	16,449	3,227	17,917
Total blankets	**24,030**	**200,331**	**26,468**	**225,889**	**31,423**	**224,696**
Of which to outside the EU	10,060	83,902	11,590	104,137	10,902	104,085

continued

Appendix 2.2 Continue

		1999 tons	1999 € '000	2000 tons	2000 € '000	2001 tons	2001 € '000
Bed linen							
Knitted	- cotton	21,514	156,021	17,198	148,347	17,997	148,397
	- other materials	4,595	20,016	1,881	22,675	2,326	32,378
Woven/printed	- cotton	45,186	354,343	36,017	399,767	35,302	387,156
	- synthetic	8,136	72,868	7,764	76,565	8,045	73,346
	- flax or ramie	36	1,025	58	1,099	37	1,600
	- other materials	519	8,344	624	8,752	597	8,580
Non-woven/printed	- synthetic	45	756	95	1,449	200	2,626
Woven/not printed	- cotton with flax	430	6,403	484	9,694	531	10,826
	- cotton	27,444	278,199	28,871	300,828	45,992	319,277
	- synthetic	5,416	47,353	4,502	48,995	5,287	48,740
	- flax	58	2,726	90	3,910	122	4,697
	- ramie	2	56	20	255	7	172
	- other materials	1,512	21,627	1,818	29,383	2,181	31,992
Non-woven/not printed	- synthetic	433	4,250	604	6,390	569	6,527
Total bed linen		**115,326**	**973,987**	**100,026**	**1058,109**	**119,193**	**1076,314**
of which to outside the EU		31,625	363,585	35,590	437,508	35,991	437,555
Bedspreads							
Knitted		956	5,515	582	4,694	583	5,154
Woven	- cotton	7,865	67,976	7,696	70,989	9,187	77,755
	- flax or ramie	11	1,013	19	1,104	13	1,223
	- other materials	3,739	28,066	3,665	29,659	3,647	26,669
Total bedspreads		**12,571**	**102,570**	**11,962**	**106,446**	**13,430**	**110,801**
of which to outside the EU		4,713	44,057	5,587	53,746	6,187	54,399
Table linen							
Knitted		598	7,670	560	7,563	318	5,239
Woven	- cotton with flax	2,232	17,852	1,129	23,104	801	18,499
	- cotton	9,213	149,899	9,480	145,283	8,529	135,632
	- flax	551	12,861	446	15,767	314	13,656
	- synthetic	2,536	43,317	2,588	41,595	2,575	40,931
	- other materials	579	12,215	705	11,738	733	12,586
Non-woven synthetic		666	5,310	692	5,893	446	3,842
Total table linen		**16,375**	**249,124**	**15,600**	**250,943**	**13,716**	**230,385**
of which to outside the EU		3,742	77,591	4,423	89,254	3,736	80,384
Bathroom and kitchen linen							
Towelling	- cotton	55,518	526,859	57,512	552,530	60,590	579,118
Woven	- cotton with flax	497	7,037	521	6,534	423	6,504
	- cotton	11,274	69,383	9,015	70,917	8,966	73,651
	- flax	360	4,704	317	4,723	245	4,715
	- synthetic	601	4,561	567	4,164	625	4,400
	- other materials	427	5,869	527	6,512	481	6,407
Non-woven	-synthetic	1,361	18,348	1,978	28,677	2,040	25,592
Total bathroom and kitchen linen		**70,038**	**636,761**	**70,437**	**674,057**	**73,370**	**700,387**
of which to outside the EU		11,078	128,053	13,171	153,935	13,414	163,914

continued

Appendix 2.2 Continue

		1999		2000		2001	
		tons	**€ '000**	**tons**	**€ '000**	**tons**	**€ '000**
Curtains							
Knitted	- cotton	3,575	13,295	1,179	11,564	1,035	12,769
	- synthetic	2,254	32,329	2,411	35,351	2,700	38,809
	- other materials	580	5,192	610	7,264	347	6,989
Woven	- cotton	7,433	87,727	7,435	95,519	9,222	93,351
	- synthetic	7,799	140,448	8,127	153,211	8,834	156,196
	- other materials	2,323	29,279	1,927	34,539	2,133	36,897
Non-woven	- synthetic	1,078	21,113	1,070	22,610	860	18,486
	- other materials	22	387	12	201	31	777
Total curtains		**25,064**	**329,770**	**22,771**	**360,259**	**25,162**	**364,274**
of which to outside the EU		5,109	84,903	5,647	100,442	5,996	104,869
Other furnishing articles							
Knitted		1,590	17,759	1,794	19,924	1,474	17,066
Woven	- cotton	5,269	49,603	5,406	60,695	5,428	61,176
	- synthetic	3,070	34,170	3,311	36,101	4,260	39,388
	- other materials	2,933	38,905	2,651	46,067	3,451	48,264
Total other furnishing articles		**12,862**	**140,437**	**13,162**	**162,787**	**14,613**	**165,894**
of which to outside the EU		3,599	45,165	4,042	58,321	4,955	61,295
Total exports		**822,201**	**6863,638**	**827,829**	**7288,576**	**877,887**	**7378,866**
of which to outside the EU		395,694	1901,235	443,072	2247,138	486,152	2257,690

Source : Eurostat

APPENDIX 3 IMPORTS OF HOUSEHOLD, FURNISHING AND FLOOR-COVERING TEXTILES INTO SELECTED EU COUNTRIES IN VOLUME AND VALUE, 1999-2001

Table 3.1 Imports of household, furnishing and floor-covering textiles into Germany in volume and value, 1999-2001

	1999		2000		2001	
	tons	€ '000	tons	€ '000	tons	€ '000
Knotted carpets	35,172	479,763	32,844	482,366	28,997	455,440
Woven carpets	5,606	19,721	5,005	17,925	4,779	17,055
Woven carpets of pile construction	17,526	88,928	16,340	81,657	17,816	85,284
Flat woven carpets	13,528	47,675	12,350	44,182	12,666	48,041
Tufted carpets	208,064	546,009	185,038	469,984	162,134	456,288
Felt carpets	33,764	77,233	24,178	71,342	27,527	80,622
Other carpets	5,813	29,184	6,091	30,370	7,361	34,089
Total floor coverings	**319,473**	**1288,513**	**281,846**	**1197,826**	**261,280**	**1176,819**
Blankets	7,243	49,982	7,456	56,163	8,616	58,768
Bed linen	59,704	425,518	65,276	450,969	64,938	453,904
Bedspreads	12,248	153,173	13,461	170,737	12,289	153,614
Table linen	34,651	243,211	36,338	255,502	36,036	256,396
Bathroom and kitchen linen	12,813	150,914	13,909	161,141	13,804	169,385
Total household textiles	**126,659**	**1022,798**	**136,440**	**1094,512**	**135,683**	**1092,067**
Curtains	2,194	13,588	2,278	13,654	2,673	15,459
Other furnishing articles	8,320	74,439	9,224	82,742	9,230	85,545
Total furnishings	**10,514**	**88,027**	**11,502**	**96,396**	**11,903**	**101,004**
Total imports	**456,646**	**2399,338**	**429,788**	**2388,734**	**408,866**	**2369,890**

Source: Eurostat

Table 3.2 Imports of household, furnishing and floor-covering textiles into France in volume and value, 1999-2001

	1999		2000		2001	
	tons	**€ '000**	**tons**	**€ '000**	**tons**	**€ '000**
Knotted carpets	2,982	47,579	3,076	49,754	3,089	50,691
Woven carpets	4,253	12,470	4,320	12,825	3,744	10,324
Woven carpets of pile construction	12,668	68,457	11,457	67,539	10,821	65,465
Flat woven carpets	5,003	20,787	6,426	25,159	4,849	21,438
Tufted carpets	63,275	176,541	65,385	184,734	57,378	171,284
Felt carpets	15,092	24,655	17,527	31,525	13,526	25,105
Other carpets	7,930	34,425	7,246	28,117	6,266	28,701
Total floor coverings	**111,203**	**384,914**	**115,437**	**399,653**	**99,673**	**373,008**
Blankets	4,949	32,589	4,714	31,636	4,669	31,960
Bed linen	32,679	256,906	35,757	271,090	33,507	252,567
Bedspreads	5,471	58,238	6,482	67,526	6,563	70,170
Table linen	24,748	185,337	24,867	190,444	26,853	205,486
Bathroom and kitchen linen	6,005	65,399	7,965	82,068	7,248	79,916
Total household textiles	**73,852**	**598,469**	**79,785**	**642,764**	**78,840**	**640,099**
Curtains	3,651	24,209	3,953	27,489	3,429	24,395
Other furnishing articles	5,738	49,491	7,315	65,558	8,670	78,712
Total furnishings	**9,389**	**73,700**	**11,268**	**93,047**	**12,099**	**103,107**
Total imports	**1940,444**	**1057,083**	**206,490**	**1135,464**	**190,612**	**1116,214**

Source: Eurostat

Table 3.3 Imports of household, furnishing and floor-covering textiles into UK in volume andvalue, 1999-2001

	1999		2000		2001	
	tons	**€ '000**	**tons**	**€ '000**	**tons**	**€ '000**
Knotted carpets	4,399	61,489	4,359	63,880	5,058	61,889
Woven carpets	19,170	18,821	8,306	19,595	8,171	21,720
Woven carpets of pile construction	33,248	145,304	76,972	166,995	86,887	177,684
Flat woven carpets	5,204	19,556	3,605	16,054	5,190	22,381
Tufted carpets	209,314	543,185	226,219	655,784	236,087	694,384
Felt carpets	23,121	37,130	26,992	45,995	21,085	36,885
Other carpets	7,552	21,811	6,877	27,601	6,518	27,511
Total floor coverings	**302,008**	**847,296**	**353,330**	**995,904**	**368,996**	**1042,454**
Blankets	4,856	22,009	4,300	29,689	5,483	37,395
Bed linen	36,081	260,778	36,906	312,704	46,317	343,019
Bedspreads	8,038	30,278	4,582	38,597	3,936	37,141
Table linen	29,522	190,059	34,456	244,408	36,387	246,510
Bathroom and kitchen linen	11,999	102,996	13,526	124,695	17,329	147,044
Total household textiles	**90,496**	**606,120**	**93,770**	**750,093**	**109,452**	**811,109**
Curtains	4,619	24,576	4,897	30,118	8,683	33,541
Other furnishing articles	19,005	37,833	8,447	51,465	8,013	60,148
Total furnishings	**23,624**	**62,409**	**13,344**	**81,583**	**16,696**	**93,689**
Total imports	**416,128**	**1515,825**	**460,444**	**1827,580**	**495,114**	**1947,252**

Source: Eurostat

Table 3.4 Imports of household, furnishing and floor-covering textiles into The Netherlands in volume and value, 1999-2001

	1999		2000		2001	
	tons	€ '000	tons	€ '000	tons	€ '000
Knotted carpets	3,243	29,684	2,684	23,954	1,930	19,124
Woven carpets	2,411	5,781	2,311	5,138	1,518	4,555
Woven carpets of pile construction	1,197	27,475	1,471	32,429	2,069	34,095
Flat woven carpets	774	5,657	516	5,303	1,251	7,733
Tufted carpets	4,727	193,101	4,348	169,780	3,948	139,979
Felt carpets	1,060	30,093	2,430	31,075	4,342	21,929
Other carpets	3,934	17,616	4,643	28,575	5,485	27,721
Total floor coverings	**17,346**	**309,407**	**18,403**	**296,254**	**20,543**	**255,136**
Blankets	966	6,918	1,351	8,259	2,235	9,339
Bed linen	14,408	101,700	14,479	100,786	13,506	94,410
Bedspreads	1,898	16,184	2,157	19,259	2,035	17,971
Table linen	9,704	63,753	8,831	61,391	8,438	59,371
Bathroom and kitchen linen	4,322	46,172	4,527	46,802	4,787	49,912
Total household textiles	**31,298**	**234,727**	**31,345**	**236,497**	**31,001**	**231,003**
Curtains	1,116	5,238	768	4,684	796	5,194
Other furnishing articles	2,480	19,679	2,552	22,183	3,029	25,489
Total furnishings	**3,596**	**24,917**	**3,320**	**26,867**	**3,825**	**30,683**
Total imports	**52,240**	**569,051**	**53,068**	**559,618**	**55,369**	**516,822**

Source: Eurostat

Table 3.5 Imports of household, furnishing and floor-covering textiles into Italy in volume and value, 1999-2001

	1999		2000		2001	
	tons	€ '000	tons	€ '000	tons	€ '000
Knotted carpets	7,513	93,537	6,923	94,177	5,507	75,565
Woven carpets	2,207	9,779	2,140	9,701	2,726	11,000
Woven carpets of pile construction	5,179	30,801	5,877	31,803	6,437	32,951
Flat woven carpets	4,484	15,806	5,112	18,810	4,829	17,025
Tufted carpets	7,888	33,580	8,569	36,373	8,358	33,536
Felt carpets	2,624	5,180	3,237	6,446	4,231	7,496
Other carpets	3,466	13,277	3,885	14,677	4,839	18,379
Total floor coverings	**33,361**	**201,960**	**35,743**	**211,987**	**36,927**	**195,952**
Blankets	1,013	8,359	1,495	12,393	2,248	17,302
Bed linen	11,605	70,115	12,878	76,938	13,662	81,744
Bedspreads	4,232	36,137	4,664	40,972	4,402	37,046
Table linen	12,977	71,825	14,426	74,279	13,303	71,425
Bathroom and kitchen linen	1,597	20,907	1,799	25,322	1,804	26,331
Total household textiles	**31,424**	**207,343**	**35,262**	**229,904**	**35,419**	**233,848**
Curtains	1,344	11,847	1,485	13,405	1,779	13,374
Other furnishing articles	2,499	20,307	3,493	25,980	4,650	28,969
Total furnishings	**3,843**	**32,154**	**4,978**	**39,385**	**6,429**	**42,343**
Total imports	**68,628**	**441,457**	**75,983**	**481,276**	**78,775**	**472,143**

Source: Eurostat

APPENDIX 4 STANDARD ORGANIZATIONS

ISO (International Standard Organization)
Address: 1, Rue de Varembé, P.O. Box 56,
CH-1211 Geneva 20, Switzerland
Telephone: + 41 (0) 22 749 0111
Telefax: + 41 (0) 22 733 3430
E-mail: central@iso.org
Internet: www.iso.org

Information concerning textile care labelling in EU countries can be obtained from:
GINETEX (Groupement international d'etiquetage pour l'entretien des textiles)
Address: 37 Rue de Neuilly, P.O. Box 121,
92113 Clichy Cedex, France
Telephone: + 33 (0) 1 4756 3180
Telefax: + 33 (0) 1 4730 2709
E-mail: ginetex@hotmail.com
Internet: www.ginetex.org

Eco-label organizations are among others:
Öko-Tex Association
Address: Gotthardstr. 61, P.O. Box 585
CH-8027 Zürich, Switzerland
Telephone: + 41 (0) 1 206 4235
Telefax: + 41 (0) 1 206 4251
E-mail: info@oeko-tex.com
Internet: http://www.oeko-tex.com

Rugmark Foundation
Address: 733 15th Street, NW, Suite 912,
Washington, D.C. 20005 USA
Telephone: + 202 (0) 347 4205
Telefax: + 202 (0) 347 4885
E-mail: info@rugmark.org
Internet: http://www.rugmark.org

APPENDIX 5 TRADE ORGANIZATIONS

EU
textile industry:
Euratex (The European Apparel & Textile Organization)
Address: 24, Rue Montoyer, Bte 10
B1000 Brussels, Belgium
Phone: + 32 (0) 2 285 2880
Fax: + 32 (0) 2 230 6054
Internet: http://www.euratex.org

carpet industry:
ECA (European Carpet Association)
Address: 24, Rue Montoyer, Bte 6
B1000 Brussels, Belgium
Phone: + 32 (0) 2 280 1813
Fax: + 32 (0) 2 280 1809
E-mail: paulette.de.wilde@euratex.org

AUSTRIA
textile industry:
Fachverband der Textilindustrie Österreichs
Address: Rudolfsplatz 12,
A-1010 Wien, Austria
Phone: + 43 (0) 1 5333 726
Fax: + 43 (0) 1 5333.72640
Internet: http://www.textilindustrie.at

wholesaler organization:
Handelsvertreter und Vermittler
Address: Schwarzenbergplatz 14,
1041 Wien, Austria
Phone: + 43 (0) 1 514 050
Fax: + 43 (0) 1 505 2647
Internet: http://www.vertreter.at/hv

BELGIUM
textile industry:
Febeltex
Address: Rue Montoyer 24,
B-1000 Brussels, Belgium
Phone: + 32 (0) 2 287 0825
Fax: + 32 (0) 2 287 0861
Internet: http://www.febeltex.be

home textiles industry:
Febeltex/Interieur Textiel
Address: Casinoplein 10,
B-8500 Kortrijk, Belgium
Phone: + 32 (0) 56 264 210
Fax: + 32 (0) 56 264 215
Internet: http://www.febeltex.be

DENMARK
textile industry:
Federation of Danish Textiles and Clothing
Address: Birk Centerpark 38,
Herning
Postal address: P.O. Box 507,
DK-7400 Herning, Denmark
Phone: + 45 (0) 97 117 200
Fax: + 45 (0) 97 122 215
Internet: http://www.textile.dk

wholesaler organization:
Danish Association of Commercial Agents
Address: Borsen,
DK-1217 Copenhagen K, Denmark
Phone: + 45 (0) 33 950 500
Fax: + 45 (0) 33 330 464
Internet: http://www.commercial-agents.dk

FINLAND
textile industry:
Federation of Finnish Textile and Clothing Industries
Address: Eteläranta 10,
SF-00131 Helsinki, Finland
Phone: + 358 (0) 9 686 121
Fax: + 358 (0) 9 653 305
Internet: http://www.finatex.fi

FRANCE
textile industry :
UIT (Union des Industries textiles)
Address: 37, rue de Neuilly – P.O. Box 121
F-92110 Clichy Cédex, France
Phone: + 33 (0) 1 4756 3120
Fax: + 33 (0) 1 4730 2528
Internet: http://www.textile.fr

GERMANY
interior textiles industry:
Heimtextil (Verband der Deustchen Heimtextilien-Industrie e.V.)
Address: Hans Bockler Strasse 205,
D-42109 Wuppertal, Germany
Phone: + 49 (0) 202 7597-0
Fax: + 49 (0) 202 759797
Internet: http://www.heimtex.de

carpet trade
BOI (Bundesveband der Orient Teppiche Importeure)
Address: Dammtotrstrasse 22,
D-2000 Hamburg 36, Germany
Phone: + 49 (0) 40 511 6077
Fax: + 49 (0) 40 346 537
Internet: http://www.care-fair.com

wholesaler organization:
Gesamtverein des deutschen Textilgrosshandel
Address: Neumarkt 35-37,
50667 Köln, Germany
Phone: + 49 (0) 221 217 092
Fax: + 49 (0) 221 212 898

GREECE
textile industry:
Hellenic Fashion Industry Association
Address: 18a Ermou Str,
GR-54624 Thessaloniki, Greece
Phone: + 32 (0) 30 310 257 075
Fax: + 32 (0) 30 310 257 076
Internet: http://www.greekfashion.gr

IRELAND
textile industry:
Irish Clothing & Textile Alliance (ICATA)
Address: Confederation House, 84/86
Lower Baggot Street,
IE-Dublin 2, Ireland
Phone: + 353 (0) 1 605 1560
Fax: + 353 (0) 1 638 1583
E-mail: susan.doyle@ibec.ie

ITALY
textile industry:
Associazione Tessile Italiana (ATI)
Address: Viale Sarca N. 223,
I-20126 Milano, Italy
Phone: + 39 (0) 2 6610 3838
Fax: + 39 (0) 2 6610 3863
Internet: http://www.asstex.it

THE NETHERLANDS
textile industry:
VTN
Address: De Schutterij 16, P.O. Box 518,
NL-3900 AM Veenendaal, The Netherlands
Phone: + 31 (0) 318 564 488
Fax: + 31 (0) 318 564 487
Internet: http://www.textielnet.nl

carpet industry:
VNTF (Organsation for carpet manufacturers in The Netherlands)
Address: Kronenburgsingel 8-41,
6831 EX Arnhem, The Netherlands
Phone: + 31 (0) 26 327 0990
Fax: + 31 (0) 26 327 0212
E-mail: info@tapijtnet.nl
Website: http://www.tapijtnet.nl

wholesaler organization:
FTGB (Federatie Textiel Groothandelsbonden)
Address: A. Goekooplaan 5,
2517 XJ The Hague, The Netherlands
Phone: + 31 (0) 70 354 2895
Fax: + 31 (0) 70 351 2777
Internet: http://www.ftgb.nl

NVKT (Nederlandse Vereniging van Kleding- en Textiel- Agenten/Importeurs)
Address: De Lairessestraat 158,
1075 HM Amsterdam, The Netherlands
Phone: + 31 (0) 20 470 0177
Fax: + 31 (0) 20 671 0974
Internet: http://www.vnt.org

PORTUGAL
textile industry:
FIP
Address: Rua Goncalo Cristovao Nr 96-1,
P-4000 Porto, Portugal
Phone: + 351 (0) 22 205 7961
Fax: + 351 (0) 22 205 0343
E-mail: aptv@mail.telepac.pt

SPAIN
textile industry:
CIE
Address: Granvia 670,
ES-08010 Barcelona, Spain
Phone: + 34 (0) 93 318 9200
Fax: + 34 (0) 93 302 6235
Internet: http://www.aitpa.es

SWEDEN
textile industry:
TEKO industrierna
Address: P.O. Box 5510, Storgatan 5,
S-11485 Stockholm, Sweden
Phone: + 46 (0) 8 762 6662
Fax: + 46 (0) 8 762 6887
Internet: http://www.teko.se

UK
textile industry:
British Apparel & Textile Confederation (BATC)
Address: 5, Portland Place,
London W1N 3AA, UK
Phone: + 44 (0) 171 636 7788
Fax: + 44 (0) 171 636 7515
Internet: http://www.batc.co.uk

carpet industry:

Carpet Foundation

Address:	P.O. Box 1155,
	Kidderminster, Worcestershire DY11 6WP, UK
Phone:	+ 44 (0) 1562 747 351
Fax:	+ 44 (0) 1562 747 359
Internet:	http://www.carpetfoundation.com

APPENDIX 6 TRADE FAIR ORGANISERS

(the only trade fairs listed are those which are open exclusively to trade visitors).

GERMANY:

Domotex/Hannover
International trade fair for carpets and floor coverings
Location: Messegelände
Segments: Woven carpets, textile floor coverings, fabrics etc.
Frequency: Annual (January)
Organization: Deutsche Messe AG, Messegelände, 30521 Hannover, Germany
Telephone: + 49 (0) 511 890
Telefax: + 49 (0) 511 893 2626
Internet: http:://www.domotex.de

Heimtextiel/Frankfurt am Main
International trade fair for floor-wall-window decoration; furniture fabrics; household textiles
Location: Messegelände Frankfurt/Main
Segments: Floor-wall-window decoration; furniture fabrics; bed-bath-table and kitchen linen
Frequency: Annual (January)
Organization: Messe Frankfurt GmbH, Ludwig Erhard-Anlage 1, 60327 Frankfurt am Main, Germany P.O. Box 150210, 60062 Frankfurt/Main, Germany
Telephone: + 49 (0) 69 75750
Telefax: + 49 (0) 69 75756433
E-mail: info@messefrankfurt.com
Internet: http www.messe frankfurt.de

Raumausstattung/Dortmund
Trade fair for interior design
Location: Messezentrum, Westfalenhallen
Sectors: Decoration textiles, curtains, carpets, home textiles, furnishings, arts and crafts etc.
Frequency: Annual (September)
Organization: Westfalenhallen Dortmund GmbH, Rheinlanddamm 200, 44139 Dortmund, Germany
Telephone: + 49 (0) 231 1204521
Telefax: + 49 (0) 231 1204678
Internet: http://www.westfalenhallen.de

Comfortex/Leipzig
Trade fair for interior furnishings and decoration
Location: Messegelände
Sectors: Decoration fabrics, curtains, household textiles etc.
Frequency: Annual (February)
Organization: Leipziger Messe GmbH, P.O. Box 100720, 04007 Leipzig
Telephone: + 49 (0) 341 6780
Telefax: + 49 (0) 341 678 8762
Internet: http://www.leipziger-messe.de

Raumtex/Stuttgart
Trade fair for interior decoration trends
Location: Killesberg
Sectors: Decoration textiles, furniture textiles, curtains, home textiles etc.
Frequency: Annual (September)
Organization: Messe Stuttgart International, P.O. Box 10352, 70028 Stuttgart
Telephone: + 49 (0) 711 25890
Telefax: + 49 (0) 711 2589440

THE NETHERLANDS

Inter decor/Utrecht
Home fashion trade fair
Location: Royal Dutch Jaarbeurs, Utrecht
Sectors: Floor coverings, beddings, bathroom textiles, household textiles, decorative textiles, curtains etc.
Frequency: Annual (September)
Organization: Royal Dutch Jaarbeurs, Jaarbeursplein, P.O. Box 8500, 3503 RM Utrecht
Telephone: + 31 (0) 30 295 5911
Telefax: + 31 (0) 30 294 0379
Internet: http://www.jaarbeursutrecht.nl

International Furniture Fair/Utrecht
International furniture trade fair
Location: Royal Dutch Jaarbeurs, Utrecht
Sectors: Furniture, furniture coverings (textiles etc.)
Frequency: Annual (September)
Organization: Royal Dutch Jaarbeurs, Jaarbeursplein, P.O. Box 8500, 3503 RM Utrecht
Telephone: + 31 (0) 30 295 5911
Telefax: + 31 (0) 30 294 0379
Internet: http://www.jaarbeursutrecht.nl

ITALY:

Pitti Casa/Florence

Household linen exhibition

Location:	Fortezza da Basso
Sectors:	Bed, bath, kitchen and table linen
Frequency:	Annual (September)
Organization:	Pitti Immagine srl, P.O. Box 2075, F1 Ferr.Acc, Via Faenza 109, 50123 Firenze
Telephone:	+ 39 (0) 55 36931
Telefax:	+ 39 (0) 55 369 3200
Internet:	http://www.pittimmagine.it

Proposte/Cernobbio

Trade exhibition of furniture fabrics and curtains

Location:	Villa Erba
Sectors:	Upholstery and decorative fabrics, furnishing fabrics, curtains etc.
Frequency:	Annual (May)
Organization:	Intar, Via Arco 4, 20121 Milano
Telephone:	+ 39 (0) 2 805 5349
Telefax:	+ 39 (0) 2 805 5350
E-mail:	comocrea@bcs.it

Specialized fair for furniture and furnishing/Bolzano

Location:	Fiera Bolzano
Sectors:	Furniture, home textiles, carpets etc.
Frequency:	Biennial (April)
Organization:	E.A. Fiera di Bolzano, Piazza Fiera 1, 39100 Bolzano
Telephone:	+ 39 (0) 471 516 000
Telefax:	+ 39 (0) 471 516 111
E-mail:	info@fairbiz.it

FRANCE:

Biennale des Editeurs de la Décoration

Furnishing fabrics exhibition

Location:	Espace Eiffel-Branly
Sectors:	Textiles, curtains, trimmings
Frequency:	Biennial (January)
Organization:	CSTA c/o Exposium, 1 rue du Parc, 92593 Levallois-Perret Cédex
Telephone:	+ 33 (0) 1 4968 5100
Telefax:	+ 33 (0) 1 4737 7438

Tapis

International trade fair for carpets and floor coverings

Location:	
Segments:	Woven carpets, textile floor coverings, fabrics etc.
Frequency:	Annual (January)
Organization:	C.O.S.P, 22 Avenue Franklin Roosevelt, F-75008 Paris, France
Telephone:	+ 33 (0) 1 4076 4500
Telefax:	+ 33 (0) 1 4563 7824
Internet:	http:://www.tapis.fr

BELGIUM:

Intirio by Textirama/Gent

Interior decoration and home textiles trade fair

Location:	Exhibition Centre Flanders
Sectors:	home textiles and decoration textiles
Frequency:	Annual (February)
Organization:	Textirama, Poortakkerstraat 90, BE 9051 Gent, Belgium
Telephone:	+ 32 (0) 9 243 8450
Telefax:	+ 32 (0) 9 243 8455
E-mail:	info@textorama.be
Internet:	http://www.textirama.be

Home Textiles and Home Decoration Trade Fair

Interior decoration and home textiles trade fair

Location:	Brussels International Trade Mart
Sectors:	Textiles, curtains etc.
Frequency:	Biannual (January and September)
Organization:	Brussels International trade mart, P.O. Box 211, Square de l'Automium 1, 1020 Brussels
Telephone:	+ 32 (0) 2 478 4989
Telefax:	+ 32 (0) 2 478 6258

SPAIN:

Textilhogar/Valencia

International fair of home textiles and decoration

Location:	Feria Valencia
Sectors:	Carpets, blankets, table linen, curtains, bathroom textiles etc.
Frequency:	Annual (January)
Organization:	Feria Valencia, Apartado 476, 46080 Valencia, Spain
Telephone:	+ 34 (0) 6 3861 100
Telefax:	+ 34 (0) 6 3636 111
Internet:	http://www.feriavalencia.com

PORTUGAL:

Casatextil/Porto

International home textiles and decoration exhibition

Location:	Exponor
Sectors:	Furnishing fabrics, curtains, terry towels, bed and table linen, rugs and carpets etc.
Frequency:	Annual (October)
Organization:	Exponor-Feira Internacional do Porto, 4450 Leça de Palmeira
Telephone:	+ 351 (0) 2 998 1400
Telefax:	+ 351 (0) 2 995 7499
Internet:	http://www.exponor.pt

APPENDIX 7 TRADE PRESS

UNITED KINGDOM

International Carpet Bulletin

Publisher: World Textile Publications Ltd.
Address: Perkin House, 1 Longlands Street,
Bradford, West Yorkshire BD1 2TP,
United Kingdom
Telephone: + 44 (0) 1274 378800
Telefax: + 44 (0) 1274 378811
Frequency: 4 times a year including Carpet Yearbook
Language: English
Internet: http://www.world-textile.net
Content: Information about global production and trade in floor coverings

Floors

Publisher: Maple Publishing Ltd.
Address: 17 Church Hill,
Purley, Surrey CR8 3QP, United Kingdom
Telephone: + 44 (0) 208 763 0552
Telefax: + 44 (0) 208 763 2994
Frequency: monthly
Language: English
Internet: http://www.world-textile.net
Content: Floor covering information

International Textiles

Address: 23 Bloomsbury Square,
London WC1A2PJ, United Kingdom
Telephone: + 44 (0) 171 6372211
Telefax: + 44 (0) 171 6372248
Frequency: monthly
Language: English
Content: (General) Textile fashion information

Textile Outlook International

Publisher: Economist Intelligence Unit
Address: P.O. Box 200, Harold Hill
Romford RM3 8UX, United Kingdom
Telephone: + 44 (0) 1708 381444
Telefax: + 44 (0) 1708 371850
Frequency: 6 times a year
Language: English
Content: Production and trade information on textiles and clothing, including household textiles

Knitting International

Address: 33 Bloomsbury Square,
London WC1A 2PJ, United Kingdom
Telephone: + 44 (0) 1274 378800
Telefax: + 44 (0) 171 6372248
Frequency: monthly
Language: English
Content: Technical and fashion information

GERMANY

BTH (Bodenbelage, Tapeten, Heimtextilien)

Publisher: SN-Verlag Michael Steinert
Address: An der Alster 21,
D-20099 Hamburg, Germany
Telephone: + 49 (0) 40 240852
Telefax: + 49(0) 40 2803 788
Language: German
Publications: Specialized magazines, like BTH
Tapetenzeitung International, BTH Raum+ Textil and Heimtex

Textil Mitteilungen (TM)

Publisher: Branche & Business Fach Verlag GmbH & Co KG
Address: P.O. Box 101701,
40008 Düsseldorf, Germany
Telephone: + 49 (0) 211 8303-0
Telefax: + 49 (0) 211 324862
Frequency: weekly
Language: German
Content: Production, trade and fashion information on textile and clothing

Textil Wirtschaft (TW)

Publisher: Deutscher Fachverlag GmbH
Address: P.O. Box 60264,
D-6000 Frankfurt am Main, Germany
Telephone: + 49 (0) 69 75952214/18
Telefax: + 49 (0) 69 75952200
Internet: http://www.twnetwork.de
Frequency: weekly
Language: German
Content: Production, trade and fashion information on textile and clothing

THE NETHERLANDS

Mobilia

Publisher: Mobilia BV
Address: P.O. Box 15431,
1001 MH Amsterdam, The Netherlands
Telephone: + 31 (0) 20 620 7624
Telefax: + 31 (0) 20 620 6934
E-mail: mobilia@interieur.net
Frequency: monthly
Language: Dutch
Content: Trade magazine for home textiles

Textilia
Publisher: VNU Business Publications
Address: P.O. Box 9194,
1006 CC Amsterdam, The Netherlands
Telephone: + 31 (0) 20 4875830
Telefax: + 31 (0) 20 4875711
E-mail: textilia@bpa.vnu.com
Frequency: weekly
Language: Dutch
Content: Trade magazine for clothing and textiles

Textile View Magazine
Publisher: Metropolitan Publishing
Address: P.O. Box 53261,
1007 RG Amsterdam, The Netherlands
Telephone: + 31 (0) 20 6177 624
Telefax: + 31 (0) 20 6179 357
Frequency: quarterly
Language: English
Content: Fashion and technology developments for yarns, fabrics etc.

Interior View
See: Textiles View
Content: Fabrics and textiles for interior design

Texpress
Publisher: VNU Business Publications
Address: P.O. Box 9194,
1006 CC Amsterdam, The Netherlands
Telephone: + 31 (0) 20 4875830
Telefax: + 31 (0) 20 4875711
Frequency: weekly
Language: Dutch
Content: Magazine for textiles industry and trade in Belgium and The Netherlands

FRANCE

Revue de l'Ameublement
Publisher: Editions du Tigre
Address: 23 rue Joubert,
F-75009, Paris, France
Telephone: + 33 (0) 1 4874 5250
Telefax: + 33 (0) 1 4016 4365
Frequency: 6 times a year
Language: French
Content: Production and trade information on furniture and furnishings

Sols, Murs, Plafonds
Publisher: Groupe Chantiers de France
Address: 202, quai de Clichy,
F-92110 Clichy, France
Telephone: + 33 (0) 1 4756 1723
Telefax: + 33 (0) 1 4756 1432
Frequency: 4 times a year
Language: French
Content: Information on interiors

APPENDIX 8 BUSINESS SUPPORT ORGANIZATIONS

Organizations, which are active in the field of the promotion of imports from developing countries.

CBI Centrum tot Bevordering van de Import uit ontwikkelingslanden
(Centre for the Promotion of Imports from developing countries)
Address: Beursplein 37 (5th floor), Rotterdam
Postal address: P.O. Box 30009,
3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 201 3434
Telefax: + 31 (0) 10 411 4081
E-mail: cbi@cbi.nl
Internet: http://www.cbi.nl

ITC (International Trade Center)
Division of Product and Market Development
Address: Palais des Nations; P.O. Box 10,
1211 Geneva 10, Switzerland
Telephone: + 41 (0) 22 7300 111
Telefax: + 41 (0) 22 730 05
E-mail: itcreg@intracen.org
Internet: http://www.intracen.org

DIPO (Danish Import Promotion Office for Products from Developing Countries)
Danish Chamber of Commerce
Address: Boersen,
DK-1217 Copenhagen K, Denmark
Telephone: + 45 (0) 33 950500
Telefax: + 45 (0) 33 325216
E-mail: dok@commerce.dk

PROTRADE/GTZ(Deutsche Gesellschaft fur Technische Zusammenarbeit GmbH)
German organization for technical cooperation
Address: Dag-Hammerskjöld-Weg 1-5;
P.O. Box 5180,
D-65726 Eschborn 1, Germany
Telephone: + 49 (0) 6196 796 000
Telefax: + 49 (0) 6196 797 414
E-mail: postmaster@gtz.de
Internet: http://www.protrade.gtz.de

BfAI (Bundesstelle fur Aussenhandelsinformation)
Federal Office of Foreign Trade Information, with offices in both Cologne and Berlin
Address: Agrippastrasse 87-93;
P.O. Box 100522,
50445 Cologne, Germany
Telephone: + 49 (0) 221 205 7000
Telefax: + 49 (0) 221 205 7212
also:
Address: Scharnhornstrasse 87-93,
P.O. Box 650268,
13302 Berlin, Germany
Telephone: + 49 (0) 30 2014 5200
Telefax: + 49 (0) 30 2014 5204

ICE (Instituto Nazionale per il Commercio Estero)
National Institute for Foreign Trade
Address: Via Liszt 21,
P.O. Box 10057,
00144 Rome, Italy
Telephone: + 39 (0) 6 59921
Telefax: + 39 (0) 6 599 26900
E-mail: sitoece@ice.it

Bundeskammer der gewerblichen Wirtschaft
Austrian Federal Economic Chamber
Address: Wiener Hauptstrasse 63,
P.O. Box 150, 1
045 Vienna, Austria
Telephone: + 43 (0) 1 501 050
Telefax: + 43 (0) 1 5020 6250
E-mail: hotline@wkoe.wk.or.at
Internet: http://www.wk.or.at

NORAD (Norwegian Agency for Development Cooperation)
Address: Tollbugaten 31,
P.O. Box 8034
Dep., N-0030 Oslo 1, Norway
Telephone: + 47 (0) 22 314 400
Telefax: + 47 (0) 22 314 403
E-mail: postmottak@oslo.norad.telemax.no

Sida (Swedish International Development Cooperation Agency)
Address: Sveavagen 20,
P.O. Box 3144,
S-10525 Stockholm, Sweden
Telephone: + 46 (0) 8 698 5000
Telefax: + 46 (0) 8 620 8864
E-mail: sida@sida.org.se
Internet: http://www.sida.se

SIPPO (Swiss Import Promotion Programme)

Address:	Stampfenbachstrasse 85, 8035 Zurich, Switzerland
Telephone:	+ 41 (0) 1 365 5151
Telefax:	+ 41 (0) 1 365 5221
E-mail:	info.zurich@osec.ch

APPENDIX 9 OTHER USEFUL ADDRESSES

The following organizations can supply useful information on quota, import duties, import licences and other trade regulations.

Import duties
Netherlands Customs Directorate
Address: Laan op Zuid 45,
3072 DB Rotterdam, The Netherlands
Postal address: P.O. Box 50964,
3007 BG Rotterdam, The Netherlands
Telephone: + 31 (0) 10 290 4949
Telefax: + 31 (0) 10 290 4894
E-mail: info@douane.nl
Internet: http://www.douane.nl

Import duties, tariffs, taxes and regulations
Ministry of Finance, Department for Tariffs and Quota
Address: Casuariestraat 32,
2511 VB The Hague, The Netherlands
Postal address: P.O. Box 20201,
2500 EE The Hague, The Netherlands
Telephone: + 31 (0) 70 342 7540
Telefax: + 31 (0) 70 342 7900
E-mail: minfin@minfin.nl
Internet: http://www.minfin.nl

Import licences, certificates, procedures:
Central Services for Import & Export
Address: De Engelse Kamp 2,
9722 AX Groningen, The Netherlands
Telephone: + 31 (0) 50 523 9111
Telefax: + 31 (0) 50 5260698
Internet: http://www.belastingdienst.nl

More information about the market and other general information can be obtained from the following addresses:

Netherlands Foreign Trade Agency
Part of the Ministry of Economic Affairs
Address: Bezuidenhoutseweg 181,
2594 AH The Hague
Postal address: P.O. Box 20105,
2500 EC The Hague, The Netherlands
Telephone: + 31 (0) 70 379 8933
Telefax: + 31 (0) 70 379 7878
E-mail: infoservice@evd.nl
Internet: http://www.hollandtrade.com

Chamber of Commerce & Industries for Rotterdam and the Lower-Meuse
Address: Beursplein 37 (3rd Floor),
3011 AA Rotterdam, The Netherlands
Postal address: P.O. Box 30025,
3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 405 7777
Telefax: + 31 (0) 10 414 5754
E-mail: post@rotterdam.kvk.nl
Internet: http://www.kvk.nl

Chamber of Commerce & Industries for Amsterdam
Address: De Ruyterkade 5,
1013 AA Amsterdam The Netherlands
Postal address: P.O. Box 2852,
1000 CW Amsterdam, The Netherlands
Telephone: + 31 (0) 20 531 4000
Telefax: + 31 (0) 20 531 4799
E-mail: post@amsterdam.kvk.nl
Internet: http://www.amsterdam.kvk.nl

The following trade directories are free available for various European countries in different languages.

Kompass
Address: Hoge Hilweg 15,
1101 CB Amsterdam, The Netherlands
Telephone: + 31 (0) 20 697 4041
Telefax: + 33 (0) 20 696 5603
E-mail: info@kompass.nl
Internet: http://www.kompass.nl

ABC of trade and industry
Address: Kon. Wilhelminalaan 16,
2012 JK Haarlem, The Netherlands
Telephone: + 31 (0) 23 531 9031
Telefax: + 33 (0) 23 532 7033
E-mail: info@abc-d.nl
Internet: http://www.abc-d.nl

Europages
Address: 47, rue Louis Blanc,
92984 Paris la Défense Cedex, France
Telephone: + 33 (0) 1 4116 4900
Telefax: + 33 (0) 1 4116 4950
E-mail: comments@europages.com
Internet: http://www.europages.com

General information for trade-related environmental, health & safety and social & ethical issues

Access Guide
Address: P.O. Box 30009,
3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2013434
Telefax: + 31 (0) 10 4114081
E-mail: accessguide@cbi.nl
Internet: http://www.cbi.nl

Contact point EU ECO-label:
Commission of the European Communities, DG XI-A-2
Address: Rue de la Loi 200,
B-1049 Brussels, Belgium
Telephone: + 32 (0) 2 2969515
Telefax: + 32 (0) 2 2969560
E-mail: dgxiweb@dg11,cec.be
Internet: http://www.europa.eu.int/comm/dg11

The Netherlands competent body for the Milieukeur environmental label:
Stichting Milieukeur
Address: Eisenhowerlaan 150,
2517 KP The Hague, The Netherlands
Telephone: + 31 (0) 70 3586300
Telefax: + 31 (0) 70 3502517
E-mail: ecomarkt@ecomarkt.nl
Internet: http://www.milieukeur.nl

Contact points for the Öko-Tex hallmark:
The secretariat of the International Association for Research and Testing in the Field of Textile Ecology Öko-Tex can be contacted under the following address:

Öko-Tex Association c/o TESTEX
Address: Gotthardstr. 61,
P.O. Box 585
CH-8027 Zürich, Switzerland
Telephone: + 41 (0) 1 206 4235
Telefax: + 41 (0) 1 206 4251
E-mail: info@oeko-tex.com
Internet: http://www.oeko-tex.com

Testing institutes for the Öko-Tex hallmark are among others:

Forschungsinstitut Hohenstein
Address: Schloß Hohenstein,
D-74357 Bonningheim, Germany
Telephone: + 49 (0) 7143 271-0
Telefax: + 49 (0) 7143 271-51
E-mail: info@hohenstein.de
Internet: http://www.hohenstein.de

BTTG (British Textile Technology Group)
Address: Shirley House 856 Wilmslow Road,
Didsbury, Manchester M20 2RB
United Kingdom
Telephone: + 44 (0) 161 445 8141
Telefax: + 44 (0) 161 434 9957
E-mail: Oeko-Tex@bttg.co.uk
Internet: http:// www.bttg.co.uk

IFTH Lyon (Institut Français Textile-Habillement)
Address: Avenue Guy de Collongue,
P.O. Box 60,
F-69132 Ecully Cedex, France
Telephone: + 33 (0) 4 7286 1600
Telefax: + 33 (0) 4 7843 3966
E-mail: tpollet@ifth.org
Internet: http://www.ifth.org

Zertifizierungsstelle
Address: Frankfurter Straße 10-14,
D-65760 Eschborn, Germany
Telephone: + 49 (0) 6196 966230
Telefax: + 49 (0) 6196 966226

Contact points for the SG (Schadstoffgeprüft Zeichen) hallmark:

TÜV Rheinland Sicherheit und Umweltschutz GmbH
Address: Am Grauen Stein,
D-51105 Cologne, Germany
Telephone: + 49 (0) 221 8062958
Telefax: + 49 (0) 221 8062882
Internet: http://www.tuev-rheinland.de

Institut Fresenius Gruppe
Address: Im Maisel 14,
D-65232 Taunusstein-Neuhof, Germany
Telephone: + 49 (0) 6128 744155
Telefax: + 49 (0) 6128 744201
Internet: http://www.institut-fresenius.de

Prüf- und Forschungsinstitut Pirmasens
Address: Hans-Sachs-Straße 2,
D-66955 Pirmasens, Germany
Telephone: + 49 (0) 6331 74016
Telefax: + 49 (0) 6331 74507

Statistical information

CBS
(Central Bureau of Statistics in The Netherlands)
Address: Prinses Beatrixlaan 428,
2273 XZ Voorburg ,The Netherlands
Postal address: P.O. Box 4000,
2270 JM Voorburg, The Netherlands
Telephone: + 31 (0) 70 337 3800
Telefax: + 31 (0) 70 387 7429
E-mail: infoservice@cbs.nl
Internet: http://www.cbs.nl

OETH
Address: Rue Belliard, 197 Bte 9,
B-1040 Brussels, Belgium
Telephone: + 32 (0) 2 2303282
Telefax: + 32 (0) 2 2304334
E-mail: info@oeth.com
Internet: http://www.oeth.com

Social environmental associations

Rugmark Foundation
Address: 733 15th Street, NW, Suite 912,
Washington, D.C. 20005 USA
Telephone: + 202 (0) 347 4205
Telefax: + 202 (0) 347 4885
E-mail: info@rugmark.org
Internet: http://www.rugmark.org

Care & Fair
Teppichhandel gegen Kinderarbeit e.V. (Carpet trade against child labour)
Address: Borsteler Chaussee 85-99a, Haus 5,
22453 Hamburg, Germany
Telephone: + 49 (0) 40 511 6057
Telefax: + 49 (0) 40 511 6078
E-mail: info@care-fair.org
Internet: http://www.care-fair.org

APPENDIX 10 LIST OF DEVELOPING COUNTRIES

Please note that the OECD list of developing countries, as applied in this market survey, may include countries that are not usually considered as developing countries (e.g. South Korea).

Afghanistan
Albania
Algeria
Angola
Anguilla
Antigua and Barbuda
Argentina
Armenia
Aruba
Azerbaijan
Bahrain
Bangladesh
Barbados
Belize
Benin
Bhutan
Bolivia
Bosnia & Herzegovina
Botswana
Brazil
Burkina Faso
Burundi
Cambodia
Cameroon
Cape Verde
Central African rep.
Chad
Chile
China
Colombia
Comoros
Congo
Cook Islands
Costa Rica
Côte d'Ivoire
Croatia
Cuba
Djibouti
Dominica
Dominican republic
Ecuador
Egypt
El Salvador
Equatorial Guinea
Eritrea
Ethiopia
Fiji
French Polynesia
Gabon
Gambia
Georgia
Ghana
Gibraltar
Grenada
Guatemala
Guinea
Guinea-Bissau
Guyana
Haiti
Honduras
India
Indonesia
Iran
Iraq
Jamaica
Jordan
Kazakstan
Kenya
Kiribati
Korea, Rep. of
Korea, South
Kyrghyz Rep.
Laos
Lebanon
Lesotho
Liberia
Libya
Macao
Macedonia
Madagascar
Malawi
Malaysia
Maldives
Mali
Malta
Marshall Islands
Mauritania
Mauritius
Mayotte
Mexico
Micronesia, Fed. States
Moldova
Mongolia
Montserrat
Morocco
Mozambique
Myanmar
Namibia
Nauru
Nepal
Netherlands Antilles
New Caledonia
Nicaragua
Niger
Nigeria
Niue
Northern Marianas
Oman
Pakistan
Palau Islands
Palestinian Admin. Areas
Panama
Papua New Guinea
Paraguay
Peru
Philippines
Rwanda
São Tomé & Principe
Saudi Arabia
Senegal
Seychelles
Sierra Leone
Slovenia
Solomon Islands
Somalia
South Africa
Sri Lanka
St. Helena
St. Kitts-Nevis
St. Lucia
St. Vincent and Grenadines
Sudan
Surinam
Swaziland
Syria
Tajikistan
Tanzania
Thailand
Timor
Togo
Tokelau
Tonga
Trinidad & Tobago
Tunisia
Turkey
Turkmenistan
Turks & Caicos Islands
Tuvalu
Uganda
Uruguay
Uzbekistan
Vanuatu
Venezuela
Vietnam
Virgin Islands (UK)
Wallis & Futuna
Western Samoa
Yemen
Yugoslavia, Fed. Rep.
Zaire
Zambia
Zimbabwe

APPENDIX 11 MAJOR BUYERS OF HOUSEHOLD AND FURNISHING TEXTILES IN THE NETHERLANDS

I Wholesalers/importers floor coverings

Bolman Woningtextiel
Visit address: Zuidvliet 404,
8921 ET Leeuwarden, The Netherlands
Postal address: P.O. Box 1111,
8900 CC Leeuwarden, The Netherlands
Telephone: + 31 (0) 58 213 5535
Telefax: + 31 (0) 58 213 2097
Trading in: Floor coverings and furnishing textiles

Van den Brink & Campman BV
Visit address: Zevenend 10,
1251 RN Laren, The Netherlands
Postal address: P.O. Box 128,
1250 AC Laren, The Netherlands
Telephone: + 31 (0) 35 5392 700
Telefax: + 31 (0) 35 5311 264

Carp Riche BV
Visit address: Industriepark 15,
5374 CM Schaijk, The Netherlands
Postal address: P.O. Box 16,
5374 ZG Schaijk, The Netherlands
Telephone: + 31 (0) 38 422 9870
Telefax: + 31 (0) 38 422 9802

Condor Carpets BV
Address: Randweg 4,
8061 RW Hasselt (Ov), The Netherlands
Telephone: + 31 (0) 38 477 8111
E-mail: condorcarpets@hetnet.nl

Cotap BV
Address: Oosterbrugstraat 27,
8281 BT Genemuiden, The Netherlands
Telephone: + 31 (0) 38 385 1515
Telefax: + 31 (0) 38 385 1525
E-mail: office@cotap.nl

Crilux NV
Address: Meppelerweg 101,
8331 CV Steenwijk, The Netherlands
Telephone: + 31 (0) 521 515 220
Telefax: + 31 (0) 521 516 498

Cunera BV
Visit address: Cuneralaa 67A,
3911 AB Rhenen, The Netherlands
Postal address: P.O. Box 1,
3910 AA Rhenen, The Netherlands
Telephone: + 31 (0) 317 619 001
Telefax: + 31 (0) 317 617 538
Internet: http://www.cunera.nl
Assortment: floor coverings and furnishings

Dehnert & Jansen
Visit address: Conradstraat 52,
3013 AP Rotterdam, The Netherlands
Postal address: P.O. Box 252,
3000 AG Rotterdam, The Netherlands
Telephone: + 31 (0) 10 424 3111
Telefax: + 31 (0) 10 424 3333
Trading in: Curtains, furniture fabrics, net curtains and floor coverings

Dersimo BV
Visit address: Noordzee 12,
3144 DB Maassluis, The Netherlands
Postal address: P.O. Box 188,
3140 AD Maassluis, The Netherlands
Telephone: + 31 (0) 10 591 4070
Telefax: + 31 (0) 10 591 7777

Desso
Visit address: Molenweg 81,
5349 AC Oss, The Netherlands
Postal address: P.O. Box 6,
5340 BD Oss, The Netherlands
Telephone: + 31 (0) 412 667 911
Telefax: + 31 (0) 412 635 165

Edel Tapijt
Address: Fabrieksstraat 13,
8281 BW Genemuiden, The Netherlands
Telephone: + 31 (0) 38 385 2211
Telefax: + 31 (0) 38 385 2291

Gelasta BV
Visit address: Karst de Langestraat 16,
8281 JA Genemuiden, The Netherlands
Postal address: P.O. Box 78,
8280 AB Genemuiden, The Netherlands
Telephone: + 31 (0) 38 385 5800
Telefax: + 31 (0) 38 385 5683

Hardeveld Tapijt BV, Van
Address: Steurweg 17,
4941 VP Raamsdonkveer, The Netherlands
Telephone: + 31 (0) 162 514 916
Telefax: + 31 (0) 162 517 483

Hillfloor BV
Visit address: Puttenstraat 1,
8281 BP Genemuiden, The Netherlands
Postal address: P.O. Box 102,
8280 AC Genemuiden, The Netherlands
Telephone: + 31 (0) 38 385 4715
Telefax: + 31 (0) 38 385 6587

Holland Haag
Visit address: Kampenringweg 44,
2803 PE Gouda, The Netherlands
Postal address: P.O. Box 344,
2800 AH Gouda, The Netherlands
Telephone: + 31 (0) 182 533 934
Telefax: + 31 (0) 182 539 952
Trading in: Curtains and floor coverings

ICE Oosterse tapijten
Visit address: Holweistraat 2,
4181 CC Waardenburg, The Netherlands
Telephone: + 31 (0) 418 651 990
Telefax: + 31 (0) 418 651 525

Intercarpet BV
Address: Tweede Broekdijk 1,
7122 LB Aalten, The Netherlands
Telephone: + 31 (0) 543 472 564
Telefax: + 31 (0) 543 476 025
E-mail: intercarpet @wxs.nl

Iran-Continental BV
Visit address: Kuiperbergweg 36,
1101 AG Amsterdam ZO, The Netherlands
Postal address: P.O. Box 12991,
1100 AZ Amsterdam, The Netherlands
Telephone: + 31 (0) 20 697 1271
Telefax: + 31 (0) 20 697 5713

Janssens Orient Carpets Holland BV
Visit address: Zevenheuvelenweg 2,
5048 AN Tilburg, The Netherlands
Postal address: P.O. Box 5039,
5004 EA Tilburg, The Netherlands
Telephone: + 31 (0) 13 468 5941
Telefax: + 31 (0) 13 463 6242
Internet: http://www.jochcarpet.nl

Karabag Oosterse Tapijten
Visit address: Bramenberg 14B,
3755 BZ Eemnes, The Netherlands
Telephone: + 31 (0) 35 531 5321
Telefax: + 31 (0) 35 531 6892

Karpi BV
Address: Tweede Broekdijk 10,
7122 LB Aalten, The Netherlands
Telephone: + 31 (0) 543 476 116
Telefax: + 31 (0) 543 476 015
E-mail: info@karpi.nl

Lethem-Vergeer BV
Visit address: Zweedsestraat 2,
7202 CK Zutfen, The Netherlands
Postal address: P.O. Box 46,
7200 AA Zutfen, The Netherlands
Telephone: + 31 (0) 575 581 822
Telefax: + 31 (0) 575 513 459
Trading in: Curtains, net curtains, floor coverings

B. van Mentz BV
Visit address: Laanakkerweg 12,
4131 PA Vianen, The Netherlands
Postal address: P.O. Box 52,
4130 EB Vianen, The Netherlands
Telephone: + 31 (0) 347 375 454
Telefax: + 31 (0) 347 374 874
Trading in: Curtains, furniture fabrics and floor coverings

De Munk Carpets BV
Visit address: Industriestraat 4a,
1704 AA Heerhugowaard, The Netherlands
Telephone: + 31 (0) 72 571 3112
Telefax: + 31 (0) 72 571 7508

Nettex Fa.
Visit address: Kokosstraat 16,
8281 JC Genemuiden, The Netherlands
Postal address: P.O. Box 120,
8280 AC Genemuiden, The Netherlands
Telephone: + 31 (0) 38 385 1717
Telefax: + 31 (0) 38
Internet: http://www.nettex.nl

Orient Company
Visit address: Dick Flemmingstraat 23,
5161 CA Sprang-Capelle, The Netherlands
Postal address: P.O. Box 321,
5160 BA Sprang-Capelle, The Netherlands
Telephone: + 31 (0) 416 275 930
Telefax: + 31 (0) 416 275 999

Ossfloor Tapijtfabrieken BV
Visit address: Kantsingel 15,
5349 AJ Oss, The Netherlands
Postal address: P.O. Box 70,
5340 AB Oss, The Netherlands
Telephone: + 31 (0) 412 674 555
Telefax: + 31 (0) 412 627 472

PeVanHa BV
Visit address: Nijverheidsstraat 53,
3861 RJ Nijkerk, The Netherlands
Postal address: P.O. Box 1075,
3860 BB Nijkerk, The Netherlands
Telephone: + 31 (0) 33 246 0777
Telefax: + 31 (0) 33 246 0300
E-mail: pvanha@hetnet.nl

P&R Trading
Visit address: Meerpaal 14A,
4904 SK Oosterhout , The Netherlands
Postal address: P.O. Box 4201,
4900 CE Oosterhout, The Netherlands
Telephone: + 31 (0) 162 454 333
Telefax: + 31 (0) 162 453 344
E-mail: pvanha@hetnet.nl

STG carpets
Visit address: Kievit 38,
8281 JC Genemuiden, The Netherlands
Postal address: P.O. Box 144,
8280 AC Genemuiden, The Netherlands
Telephone: + 31 (0) 38 385 4713
Telefax: + 31 (0) 38 385 4785

Tapijtdesign
Address: Noord Parallelweg 65,
5142 GZ Waalwijk, The Netherlands
Telephone: + 31 (0) 416 652 629
Telefax: + 31 (0) 416 652 872
Internet: http://www.tapijtdesign.nl

Gebr. Willard BV
Visit address: Nikkelstraat 29,
1411 AG Naarden, The Netherlands
Postal address: P.O. Box 5184,
1410 AD Naarden, The Netherlands
Telephone: + 31 (0) 35 699 6000
Telefax: + 31 (0) 35 699 6016
Trading in: Home textiles

Wyers Interior Collections BV
Address: Haarweg 40,
3953 BH Maarsbergen, The Netherlands
Telephone: + 31 (0) 343 438 922
Telefax: + 31 (0) 343 431 677
Trading in: Curtains, net curtains, furniture fabrics, floor coverings etc.

II Wholesalers/importers household and furnishing textiles

Acantex BV
Address: Emmawijk 60,
8011 CN Zwolle, The Netherlands
Telephone: + 31 (0) 38 422 9870
Telefax: + 31 (0) 38 422 9802
Trading in: Bed textiles

Arli International BV
Visit address: Voorjaarsweg 5,
7532 SJ Enschede, The Netherlands
Postal address: P.O. Box 6318,
7503 GL Enschede, The Netherlands
Telephone: + 31 (0) 53 461 5055
Telefax: + 31 (0) 53 461 5225
Trading in: Quilt cover sets

Bedding House BV
Visit address: Heereweg 33a,
2161 AC Lisse, The Netherlands
Postal address: P.O. Box 135,
2160 AC Lisse, The Netherlands
Telephone: + 31 (0) 252 419 050
Telefax: + 31 (0) 252 412 846
Trading in: Bed textiles

H.D. Boekholt BV
Visit address: Flensburgweg 15,
9723 TN Groningen, The Netherlands
Postal address: P.O. Box 5100,
9700 GC Groningen, The Netherlands
Telephone: + 31 (0) 50 544 5050
Telefax: + 31 (0) 50 542 2324
E-mail: boekholt@inn.nl
Trading in: Home textiles; furniture fabrics and undercarpet (no other floor covering)

Bolman Woningtextiel
Address etc.: see under wholesaler/importers floor coverings
Trading in: Curtains, net curtains, furniture fabrics, bed linen, table linen etc.

Van den Broek BV
Visit address: Hongkongstraat 22,
3047 BS Rotterdam, The Netherlands
Postal address: P.O. Box 11378,
3004 EJ Rotterdam, The Netherlands
Telephone: + 31 (0) 10 298 3888
Telefax: + 31 (0) 10 262 3922
Trading in: General textiles

Capsicum Import/Export BV
Visit address: Groenburgwal 25,
1011 HR Amsterdam, The Netherlands
Postal address: P.O. Box 16495,
1001 RN Amsterdam, The Netherlands
Telephone: + 31 (0) 20 623 0112
Telefax: + 31 (0) 20 626 2075
Trading in: Curtains, other furnishing textiles, bed and table linen

Cordima Nederland BV
Visit address: Gildestraat 22,
7622 AC Borne, The Netherlands
Postal address: P.O. Box 110,
7620 AC Borne, The Netherlands
Telephone: + 31 (0) 74 266 6611
Telefax: + 31 (0) 74 266 6585
Trading in: Net curtains and curtains

Duplex Textiel
Visit address: Vossenbeemd 114,
5705 CL Helmond, The Netherlands
Postal address: P.O. Box 92,
5700 AB Helmond The Netherlands
Telephone: + 31 (0) 492 525 151
Telefax: + 31 (0) 492 536 945
Trading in: Bathroom, kitchen linen and cover sheets

Gebr. Eijffinger BV
Visit address: Heliumstraat 100,
2718 SL Zoetermeer, The Netherlands
Postal address: P.O. Box 200,
2700 AE Zoetermeer, The Netherlands
Telephone: + 31 (0) 79 344 1225
Telefax: + 31 (0) 79 331 1758
E-mail: eijffinger.zoetermeer@wxs.nl
Trading in: Wall coverings and furnishing fabrics

Gretex
Address: Dorpsstraat 63,
5708 GD Helmond, The Netherlands
Telephone: + 31 (0) 492 598 390
Telefax: + 31 (0) 492 598 393
Internet: http://www.gretex.com
Trading in: Furnishing textiles

Inside Floor BV
Visit address: Keerweer 10,
2381 GC Zoeterwoude, The Netherlands
Postal address: P.O. Box 13,
2380 AA Zoeterwoude, The Netherlands
Telephone: + 31 (0) 71 580 3625
Telefax: + 31 (0) 71 580 2805
Trading in: Curtains and fabrics

Keymer
Visit address: Elbe 23,
2267 CV Leidschendam, The Netherlands
Postal address: P.O. Box 234,
2260 AE Leidschendam, The Netherlands
Telephone: + 31 (0) 70 317 8033
Telefax: + 31 (0) 70 320 1609
Trading in: Furniture fabrics

Lancier BV
Visit address: Vosboerweg 22,
7556 BS Hengelo, The Netherlands
Postal address: P.O. Box 359,
7550 AJ Hengelo, The Netherlands
Telephone: + 31 (0) 74 291 6899
Telefax: + 31 (0) 74 242 5988
Trading in: Furniture fabrics

Maas BV
Visit address: Osloweg 91-A,
9723 BK Groningen, The Netherlands
Postal address: P.O. Box 5065,
9700 Groningen, The Netherlands
Telephone: + 31 (0) 50 313 2045
Telefax: + 31 (0) 50 314 3202
Trading in: Curtains, net curtains, bed linen, table linen etc.

Paro Collection BV
Address: Verl. Hoogravenseweg 67,
3525 BB Utrecht, The Netherlands
Telephone: + 31 (0) 30 289 6774
Telefax: + 31 (0) 30 280 4919
Trading in: Curtains and furniture fabrics

Praag Sigaar Import/Export BV
Address: Haarlemmerstraatweg 107/109,
1165 MK Halfweg, The Netherlands
Telephone: + 31 (0) 20 497 5535
Telefax: + 31 (0) 20 497 7473
Trading in: Household textiles

Pro Deco BV
Address: Sint lambertusstraat 36 BCD,
5266 AE Cromvoirt, The Netherlands
Telephone: + 31 (0) 411 644 184
Telefax: + 31 (0) 411 644 057
E-mail: info@pro-deco.com
Internet: http://www.pro-deco.com
Trading in: Table linen and table decorations

Bernard Reyn BV
Visit address: Van Leeuwenhoekweg 19,
5482 TK Schijndel, The Netherlands
Telephone: + 31 (0) 73 549 8181
Telefax: + 31 (0) 73 547 7209
Trading in: Furniture fabrics

P.A. Schrauwers BV
Visit address: Julianastraat 119,
5104 ET Dongen, The Netherlands
Postal address: P.O. Box 2,
5100 AA Dongen, The Netherlands
Telephone: + 31 (0) 162 312 950
Telefax: + 31 (0) 162 314 669
Trading in: Furniture fabrics

Textur BV
Postal address: P.O. Box 36073,
1020 MB Amsterdam, The Netherlands
Telephone: + 31 (0) 20 632 3310
Telefax: + 31 (0) 20 632 2346
Trading in: Bathroom linen, bath gowns, kitchen linen etc

United Comfort Industries
Adress: Max Euwelaan 57,
3062 MA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 453 2400
Telefax: + 31 (0) 10 452 9055
E-mail: comfort@uci.nl
Trading in: Bed textiles

Van Veen Textiel
Visit address: Zwanebloem 35,
2411 MP Bodegraven, The Netherlands
Postal address: P.O. Box 33,
2410 AE Bodegraven, The Netherlands
Telephone: + 31 (0) 172 619 251
Telefax: + 31 (0) 172 612 631
E-mail: info@vanveentextiel.nl
Trading in: Household textiles

H.B. Verbeek BV
Visit address: Woerdsestraat 9,
6628 KC Altforst, The Netherlands
Postal address: Woerdsestraat 9,
6628 KC Altforst, The Netherlands
Telephone: + 31 (0) 487 541 610
Telefax: + 31 (0) 487 541 789
E-mail: hbverbeek@wxs.nl
Trading in: Furniture fabrics

Verotex BV
Visit address: Edisonweg 3,
5466 AR Veghel, The Netherlands
Postal address: Edisonweg 3,
5466 AR Veghel, The Netherlands
Telephone: + 31 (0) 413 342 338
Telefax: + 31 (0) 413 364 323
Trading in: Furniture fabrics

Vespolino BV
Visit address: A. Mulderweg 8,
5657 EM Eindhoven, The Netherlands
Postal address: P.O. Box 8585,
5605 KN Eindhoven, The Netherlands
Telephone: + 31 (0) 40 238 0304
Telefax: + 31 (0) 40 238 0388
Trading in: Household textiles

Viool Import/Export/Agenturen BV
Address: Bramenberg 17,
3755 BV Eemnes, The Netherlands
Telephone: + 31 (0) 35 538 9740
Telefax: + 31 (0) 35 538 7113
Trading in: Fabrics for furniture, curtains

Wedetex BV
Address: Beemdstraat 7,
5711 CV Someren, The Netherlands
Telephone: + 31 (0) 493 493 002
Telefax: + 31 (0) 493 490 850
Trading in: Household textiles

Wevex Nederland BV
Visit address: Lenteweg 20,
7532 RB Enschede, The Netherlands
Postal address: P.O. Box 6330,
7503 GL Enschede, The Netherlands
Telephone: + 31 (0) 53 461 4545
Telefax: + 31 (0) 53 461 5505
Trading in: Bed linen

Van Wijkvliet Holding BV
Address: Hofland 7,
2371 BH Roelofarendsveen, The Netherlands
Telephone: + 31 (0) 71 331 5374
Telefax: + 31 (0) 71 331 5902
Trading in: Curtains

Wirtz Meubelstoffen
Visit address: Evenboerseweg 18,
7711 GX Nieuwleusen, The Netherlands
Postal address: P.O. Box 75,
7710 AB Nieuwleusen, The Netherlands
Telephone: + 31 (0) 529 482 114
Telefax: + 31 (0) 529 484 345
E-mail: wirtz.meubelstoffen@wxs.nl
Trading in: Furniture fabrics

III Manufacturers/importers household and furnishing textiles

J. van de Acker
Visit address: Schoolstraat 18,
5421 KT Gemert, The Netherlands
Postal address: P.O. Box 14,
75420 AA Gemert, The Netherlands
Telephone: + 31 (0) 492 361 321
Telefax: + 31 (0) 492 366 028
Trading in: Curtains

Ten Cate Houstex Products BV
Visit address: Gronausestraat 309,
7581 CV Losser, The Netherlands
Postal address: P.O. Box 170,
7580 AD Losser, The Netherlands
Telephone: + 31 (0) 53 537 3777
Telefax: + 31 (0) 53 537 3799
Trading in: Household textiles

Damai Bedmode BV
Visit address: Voorjaarsweg 5,
7532 SJ Enschede, The Netherlands
Postal address: P.O. Box 6318,
7503 GL Enschede, The Netherlands
Telephone: + 31 (0) 53 461 7599
Telefax: + 31 (0) 53 461 0549
Trading in: Bed textiles

Elias Jorzolino BV (new name: Jema Benelux)
Visit address: Planthofsweg 53,
7601 PH Almelo, The Netherlands
Telephone: + 31 (0) 546 484 646
Telefax: + 31 (0) 546 484 648
Trading in: Household textiles

IV Central buying organizations

Intres (International Retail Support)
Address: Koninginneweg 1,
3871 JZ Hoevelaken, The Netherlands
Mail address: P.O. Box 150,
3870 CD Hoevelaken, The Netherlands
Phone: + 31 (0) 33 2532911
Fax: + 31 (0) 33 2532299
E-mail: info@intres.nl
Internet: http://www.intres.nl

Euretco Fashion
Address: Achimedesstraat 17,
4816 BA Breda, The Netherlands
Mail address: P.O. Box 3254,
4800 ME Breda, The Netherlands
Phone: + 31 (0) 76 5785 542
Fax: + 31 (0) 76 5785 753
E-mail: info@euretco.net
Internet: http://www.euretco.nl.

Topform
Visit address: Staalweg 2,
4104 AT Culemborg, The Netherlands
Postal address: P.O. Box 50,
4100 AB Culemborg, The Netherlands
Telephone: + 31 (0) 345 512 245
Telefax: + 31 (0) 345 516 734

V Department stores

De Bijenkorf
Address: Frankemaheerd 6,
Amsterdam-ZO, The Netherlands
Mail address: P.O. Box 12870,
1100 AW Amsterdam, The Netherlands
Phone: + 31 (0) 20 3129700
Fax: + 31 (0) 20 6973926
Internet: http://www.bijenkorf.nl

Hema
Address: Frankemaheerd 2,
Amsterdam-ZO, The Netherlands
Mail address: P.O. Box 23220,
1100 DS Amsterdam, The Netherlands
Phone: + 31 (0) 20 3114411
Fax: + 31 (0) 20 3114000
Internet: http://www.hema.nl

Makro
Address: Dalsteindreef 101-139,
Diemen, The Netherlands
Mail address: P.O. Box 22579,
1100 DB Amsterdam ZO, The Netherlands
Phone: + 31 (0) 20 3980200
Fax: + 31 (0) 20 3980201
Internet: http://www.makro.nl

Trendhopper
(interior department store)
Visit address: Plesmanlaan 1,
3833 LA Leusden, The Netherlands
Postal address: P.O. Box 268,
3830 AG Leusden, The Netherlands
Telephone: + 31 (0) 33 434 3434
Telefax: + 31 (0) 33 434 3440
E-mail: office@trendhopper.nl
Nr. of outlets: 52

Vroom & Dreesmann
Address: Spaklerweg 52,
1096 BA Amsterdam, The Netherlands
Mail address: P.O. Box 276,
1000 AG Amsterdam, The Netherlands
Phone: + 31 (0) 20 5959111
Fax: + 31 (0) 20 6926150
Internet: http://www.vroomendreesmann.nl

VI Textile supermarkets/discounters

Hans Textiel & Mode
Address: Kolenbranderstraat 10,
2984 AT Ridderkerk, The Netherlands
Mail address: P.O. Box 4169,
2980 GD Ridderkerk, The Netherlands
Phone: + 31 (0) 180 442020
Fax: + 31 (0) 180 442029

Henk ten Hoor Textiel
Address: Stephensonstraat 57,
7903 AS Hoogeveen, The Netherlands
Mail address: P.O. Box 2060,
7900 BB Hoogeveen, The Netherlands
Phone: + 31 (0) 528 272022
Fax: + 31 (0) 528 273548
E-mail: info@htenhoor.nl
Internet: http://www.henktenhoor.nl

Wibra
Address: Hammerstraat 9,
8161 PH Epe, The Netherlands
Mail address: P.O. Box 192,
8160 AD Epe, The Netherlands
Phone: + 31 (0) 578 676333
Fax: + 31 (0) 578 615070

Zeeman TextielSupers
Address: De Schans 15,
2405XX Alphen a/d Rijn, The Netherlands
Mail address: P.O. Box 301,
2400 AH Alphen a/d Rijn, The Netherlands
Phone: + 31 (0) 172 482911
Fax: + 31 (0) 172 482293
E-mail: zeeman@zeeman.com
Internet: http://www.zeeman.com

VII Mail-order houses

Wehkamp
Address: Meeuwenlaan 2,
8011 BZ Zwolle, The Netherlands
Mail address: P.O. Box 400,
8000 AK Zwolle, The Netherlands
Phone: + 31 (0) 38 4973311
Fax: + 31 (0) 38 4973495
E-mail: webmaster@wehkamp.nl
Internet: http://www.wehkamp.nl

VIII Furnishing stores (including discounters)

Bartels
Visit address: Winkelveldstraat 32,
5916 NX Venlo, The Netherlands
Postal address: P.O. Box 41,
5900 AA Venlo, The Netherlands
Telephone: + 31 (0) 77 351 2220
Telefax: + 31 (0) 77 351 1712
Nr. of outlets: 20

Leen Bakker BV
Visit address: Karperweg 3,
4941 SH Raamsdonkveer, The Netherlands
Postal address: P.O. Box 43,
4940 AA Raamsdonkveer, The Netherlands
Telephone: + 31 (0) 162 583 100
Telefax: + 31 (0) 1162 516 522
Nr. of outlets: 93

Carpet-land
Address: Franciscusdreef 60,
3565 AC Utrecht, The Netherlands
Telephone: + 31 (0) 30 263 1263
Telefax: + 31 (0) 30 263 1262
Nr. of outlets: 63

Decokay
Visit address: Ruysstraat 57,
5921 VJ Venlo, The Netherlands
Postal address: P.O. Box 2502,
5902 JA Venlo, The Netherlands
Telephone: + 31 (0) 77 387 4565
Telefax: + 31 (0) 77 387 0810
E-mail: info@decokay.nl
Website: http://www.decokay.nl
Nr. of outlets: 38

Hage
Visit address: Ambachtsweg 3,
2641 KS Pijnacker, The Netherlands
Postal address: P.O. Box 130,
2640 AC Pijnacker, The Netherlands
Telephone: + 31 (0) 15 369 4940
Telefax: + 31 (0) 15 369 7840
Nr. of outlets: 18

Kwantum
Visit address: B. van Zuylenstraat
10, 5032 MA Tilburg, The Netherlands
Postal address: P.O. Box 90160,
5000 LK Tilburg, The Netherlands
Telephone: + 31 (0) 13 462 6626
Telefax: + 31 (0) 13 463 7979
E-mail: info@kwantum.nl
Internet: http://www.kwantum.nl
Nr. of outlets: 83

Perez Perziche Tapijten
Visit address: Zevenheuvelenweg 2,
5048 AN Tilburg, The Netherlands
Postal address: P.O. Box 5136,
5004 EC Tilburg, The Netherlands
Telephone: + 31 (0) 13 468 6188
Telefax: + 31 (0) 13 463 6242
E-mail: info@perez-perzen.nl
Internet: http://www.perez-perzen.nl
Nr. of outlets: 12

Roobol Woonwinkels
Visit address: Donk 3, 2991
LE Barendrecht, The Netherlands
Postal address: P.O. Box 46,
2990 AA Barendrecht, The Netherlands
Telephone: + 31 (0) 180 644 644
Telefax: + 31 (0) 180 644 554
E-mail: info@roobol.com
Internet: http://www.roobol.com
Nr. of outlets: 42

Tapijtcentrum Nederland
Visit address: Hoofdstraat 53,
5683 AC Best, The Netherlands
Postal address: P.O. Box 107,
5680 AC Best, The Netherlands
Telephone: + 31 (0) 499 373 223
Telefax: + 31 (0) 499 396 242
Nr. of outlets: 24

IX Industrial laundries/rental companies

Berendsen Textiel Service BV
Address: Pieter Calandweg 2,
6827 BK Arnhem, The Netherlands
Postal address: P.O. Box 5004,
6802 EA Arnhem, The Netherlands
Telephone: + 31 (0) 26 384 8140
Telefax: + 31 (0) 26 384 8147
Internet: http://www.berendsen.nl

Blycolin-Groep
Address: Van Heemstraweg Oost 4,
Zaltbommel, The Netherlands
Postal address: P.O. Box 288,
5300 AG Zaltbommel, The Netherlands
Telephone: + 31 (0) 418 541 800
Telefax: + 31 (0) 418 541 850
E-mail: office@blycolin.nl
Internet: http://www.blycolin.nl
Remarks: specialised in horeca

Rentex Nederland BV
Address: Diedenweg 94 A,
6717 KV Ede, The Netherlands
Telephone: + 31 (0) 318 622 484
Telefax: + 31 (0) 318 630 444
E-mail: info@rentex.nl
Internet: http://www.rentex.nl

Initial/Hokatex BV
Address: Westeinde 50,
2275 AE Voorburg, The Netherlands
Telephone: + 31 (0) 70 3576357
Telefax: + 31 (0) 70 387 4001
E-mail: info@initialhokatex.nl
Internet: http://www.rentokilhokatex.nl

Vendrig-Groep BV
Address: Produktieweg 5,
3401 MG IJsselstein, The Netherlands
Telephone: + 31 (0) 30 212 3000
Telefax: + 31 (0) 30 688 1927
E-mail: info@vendrig.nl
Internet: http://www.vendrig.nl

Wilhelmina Textieldiensten BV
Address: Ringdijk 20,
5705 CT Helmond, The Netherlands
Postal address: P.O. Box 200,
5700 AE Helmond, The Netherlands
Telephone: + 31 (0) 492 598 181
Telefax: + 31 (0) 492 526 105

APPENDIX 12 MAJOR BUYERS OF HOUSEHOLD, FURNISHING AND FLOOR-COVERING TEXTILES IN THE EU

GERMANY

German retail organizations

Aro Heimtextilien GmbH & Co KG

Address: Schleifweg 45-53,
D-90409 Nürnberg, Germany
Telephone: + 49 (0) 911 36550
Telefax: + 49 (0) 9 11 364491
Outlets: 120
Activity: Carpets and floor coverings chain

NKD Vertrieb GmbH

Address: Bühlstrasse 5-7,
D-95463 Bindlach,, Germany
Telephone: + 49 (0) 92 08/699-0
Telefax: + 49 (0) 92 08/699209
E-mail: info@nkd.de
Internet: http://www.nkd.de
Activity: Textiles chain

Ernsting's family GmbH & Co. KG

Address: Industriestraße 1,
PO.Box 2162,
D-48644 Coesfeld-Lette, Germany
Telephone: + 49 (0) 25 46 / 77 -0
Telefax: + 49 (0) 25 46 / 77 -2 89
E-mail: info@ernstings-family.de
Internet: http://www.ernstings-family.de
Activity: Textiles chain

Quelle

Quelle Karstadt Gruppe

Buying office: Quelle Schickedanz Holding
Address: Nürnberger Strasse 91-95,
90762 Fürth, Germany
Phone: + 49 (0) 911 140
Fax: + 49 (0) 911 142 4361
Internet: http://www.quelle.de

Karstadt/Hertie

Karstadt Quelle Gruppe
Buying office: Karstadt AG
Address: Theodor-Althoffstrasse 2,
45133 Essen, Germany
Phone: + 49 (0) 201 7271
Fax: + 49 (0) 201 7275 216
Internet: http://www.karstadt.de

Katag

Buying office: Katag AG Textileinkaufsverband
Address: Stralsunderstrasse 5,
33605 Bielefeld, Germany
Phone: + 49 (0) 521 2920
Fax: + 49 (0) 521 292101
Internet: http://www.katag.net

Kaufhof

Metro Gruppe

Buying office: Kaufhof Warenhaus AG
Address: Leonhard Tietz strasse 1,
50676 Köln, Germany
Phone: + 49 (0) 221 2230
Fax: + 49 (0) 221 2231902
Internet: http://www.kaufhof.de

German buying organizations

Coratex GmbH Leistungsgemeinschaft

Address: E.C.Baumann-Strasse 12,
D-95326 Kulmbach, Germany
Phone: + 49 (0) 9221 800 70
Fax: + 49 (0) 9221 800 87
Internet : http://www.saum-und-viehbahn.de
Activity: Buying group

Bettenring e. G.

Address: Echterdinger Str. 115,
D-70794 Filderstadt, Germany
Phone: + 49 (0) 711 709 580
Fax: + 49 (0) 711 709 5811
Internet : http://www.bettenring.de
Activity: Buying group bed textiles

Bettenkreis GmbH & Co. KG

Address: Pascalstrasse 4,
D-47506 Neukirchen, Germany
Phone: + 49 (0) 2845 9134 0
Fax: + 49 (0) 2845 9134 34
Internet : http://www. bettenkreis.de
Activity: Buying group bed textiles

Unitex

Buying office: Unitex Einkaufsverband GmbH
Address: Albrecht-Berblinger Strasse 11,
Neu-Ulm, Germany
Mail address: P.O. Box 2029, 89229 Neu-Ulm, Germany
Phone: + 49 (0) 731 707 940
Fax: + 49 (0) 731 707 9446
Internet: http://www.unitex-gnbh.de
Activity: Household textiles

Sütex
Buying office: Sütex Textil Verbund AG
Address: Eschenbrünnlestrasse 12-14,
71065 Sindelfingen, Germany
Phone: + 49 (0) 7031 610 20
Fax: + 49 (0) 7031 610 2336
Internet: http://www.suetex.de
Activity: Household textiles

Wholesalers/importers
Süllwold & Resch Converter GmbH
Address: Gothaer Strasse 2,
D-40880 Ratingen, Germany
Phone: + 49 (0) 2102 4905 0
Fax: + 49 (0) 2102 4905 54
Internet : http://www.suellwold-resch.de
Activity: Converter household textiles

SISO Textil GmbH Franz Sinn & Sohn
Address: Neuenhofstrasse 191,
D-52078 Aachen, Germany
Phone: + 49 (0) 241 5299 0
Fax: + 49 (0) 241 5299 129
Internet : http://www.sisotextil.de
Activity: Wholesaler/importer household textiles

Schürpf & Co. AG
Address: Zürcherstraße 45,
CH-9001 St. Gallen
Phone: + 41 (0) 71 274 21 21
Fax: + 41 (0) 71 274 21 22
Internet: http://www.schuerpf.ch
Activity: Wholesaler/importer household textiles

Max Bauerfeind KG
Address: Himmelgartenstrasse 14,
D-91077 Neunkirchen, Germany
Phone: + 49 (0) 09134 281
Fax: + 49 (0) 09134 17 27
Internet : http://www.max-bauerfeind.de
Activity: Wholesaler/importer

Langendorf & Keller GmbH
Address: Hotzenwaldstrasse 70,
D-79730 Murg-Niederhof, Germany
Phone: + 49 (0) 7763 61 12
Fax: + 49 (0) 7763 14 20
E-mail: lake.keller@t-online.de
Activity: Wholesaler/importer

Kracht & Co. GmbH
Address: Lehbrinksweg 68,
D-32657 Lemgo, Germany
Phone: + 49 (0) 5261 9667 0
Fax: + 49 (0) 5261 689 32
Internet : http://www.kracht.com
Activity: Manufacturer/importer

K. Wermuth GmbH Wäschefabrik
Address: Zirgesheimer Str. 31 b,
D-86609 Donauwörth, Germany
Phone: + 49 (0) 906 7003 0
Fax: + 49 (0) 906 7003 150
E-mail: majestic-don@t-online.de
Activity: Manufacturer/importer

Jan Jacob Textilvertriebs GmbH
Address: Schnackenburgallee 179,
D-22525 Hamburg, Germany
Phone: + 49 (0) 40 890 70 313
Fax: + 49 (0) 40 890 70 315
Internet : http://www.janjacob.de
Activity: Wholesaler/importer

FRANCE
Carrefour
Buying office: Carrefour France
Address: ZI Saint-Guénault,
Evry Courcouronnes , France
Mail address: P.O. Box 75,
91002 Evry Courcouronnes, Cedex- France
Phone: + 33 (0) 1 60 91 37 37
Fax: + 33 (0) 1 60 78 02 91
Internet: http://www.carrefour.com

La Redoute
PPR Group
Buying office: Redcats
Address: 57 Rue de Blanchemaille,
59082 Roubaix, France
Phone: + 33 (0) 3 2069 6000
Fax: + 33 (0) 3 2030 5939
Subsidiaries: Empires Stores (UK), Ellos (Spain) and
Brylane (USA)

Monoprix/ Prisunic
Galeries Lafayette Group
Address: Tour Vendôme, 204 Rond Point du Pont Sèvres,
92516 Boulogne Billancourt, France
Phone: + 33 (0) 1 5520 7700
Fax: + 33 (0) 1 5520 8207
Internet: http://www.monoprix.fr

UNITED KINGDOM
Matalan
Address: Jillibrands Road,
Skelmersdale, Lancashire
WN8 9TB, United Kingdom
Phone: + 44 (0) 169 555 2400
Fax: + 44 (0) 169 555 2401
Internet: http://www.matalan.co.uk

Peacocks

Address:	Atlantic House, Tyndall Street, Cardiff CF1 5BE, United Kingdom
Phone:	+ 44 (0) 292 027 0000
Fax:	+ 44 (0) 292 044 0400
Internet:	http://www.peacocks.co.uk

Brown & Jackson

Address:	Knowsthorpe Gate, Cross Green Industrial Estate, Leeds, West Yorkshire LS9 0NP, UK
Phone:	+ 44 (0) 113 240 6406
Fax:	+ 44 (0) 113 254 9376
Internet:	http://www.brownandjackson.co.uk

Tesco

Buying office:	Tesco Stores Ltd
Address:	44 Cirrus Building C- Schire Park- Welwyn Garden City Herts AL7 1ZR, United Kingdom
Phone:	+ 44 (0) 1992 632222
Fax:	+ 44 (0) 1707 297574 (achats UK); + 44 (0) 1707 297645 (achats hors UK)
Internet:	http://www.tesco.co.uk

ITALY

UPIM

Gruppo La Rinascente

Address:	Strada 8, Palazzo N, 20089 Rozzanp Milano, Italy
Phone:	+ 39 (0) 2 57581
Fax:	+ 39 (0) 2 9065 9055
Internet:	http://www.rinascente.it

Calzedonia

Address:	Via Salieri, Vallese di Oppeano, 37050 Oppeano (Veneto), Italy
Phone:	+ 39 (0) 45 698 4111
Fax:	+ 39 (0) 45 713 4630
Internet:	http://www.calzedonia.it

Gruppo Coin

Address:	Via Terraglio, 30174 Mestre (Venezia), Italy
Phone:	+ 39 (0) 41 549 8000
Fax:	+ 39 (0) 41 549 8517
Internet:	http://www.gruppocoin.it or http://www.coin.it

APPENDIX 13 SOURCES OF INFORMATION

- Household textiles, CBI 1999
- Carpets and textile floorcoverings, CBI 1998
- "Textiles and Clothing, an introduction to quality requirements in selected markets by ITC (International Trade Centre Unctad/Gatt)
- Trade statistics Comext CD-Rom no.2-2001 and 7A-2002
- Euratex Bulletins 2002-1, 2 and 3
- Prospects for household textiles in developed countries, TOI July 2000
- Consumer Europe-Marketing Data 2001
- Furniture and furnishings in Germany, Consumer Goods Europe, November 1999
- Furniture and furnishings in France, Consumer Goods Europe, March 2000
- Furniture and furnishings in Italy, Consumer Goods Europe, March 2000
- Furniture and furnishings in The Netherlands, Consumer Goods Europe, January 1999
- Woonzaken, Branches in detail 2002, HBD

APPENDIX 14 USEFUL SITES FOR EXPORTERS OF HOUSEHOLD, FURNISHING AND FLOOR-COVERING TEXTILES TO THE EU MARKET

Besides the approx.125 websites mentioned in this survey and including interesting sites of publishers like http://www.world-textile.net and http://twnetwork.de, of trade fair organisers, like http://www.messe frankfurt.de (Heimtextiel) and http://www.domotex.de and of branch organizations like http://www.heimtex.de and http://comnebacktocarpet.com. the following sites may be useful:

http://www.inteletex.com
Inteletex is a textile business information and resource centre of World Textile Publications, leading publisher of B2B information for the textiles industry. A combination of free and subscriber-only areas, Inteletex features content from their specialist publications, like Textile Month, Textile Horizon, International Carpet Bulletin etc. Besides news and analysis, this site contains information about trade events and a directory.

http://www.etsa-europe.org
E.T.S.A. is the acronym for the European Textile Services Association, which represent and promote the textile rental services sector in Europe. Information about relevant European legislation and industrial standards, informs legislators about the textile rental sector and promotes best industry practices. This site includes links to many textile service and other industry associations, research institutes and standards bodies.

http://www.euratex.org
Euratex regularly publishes statistics on trade, consumption, employment and other relevant information. Euratex's sole objective is to promote the interests of its members (the European textile and clothing industry).

International operating consultants and research offices publish several surveys concerning fashion, clothing etc. on Internet, like http://www.kurtsalmon.com; http://www.davidrigbyassociates.com and http://www.just-style.com
Information about the EU's trade policy in the textiles sector is given on the following site: http:/www.europa.eu.int

CBI puts you in touch with the markets of Europe

CBI, the Centre for the Promotion of Imports from developing countries, is an agency of the Netherlands Ministry of Foreign Affairs. Since its establishment in 1971, CBI operates within the policy framework set by the Minister for Development Co-operation. Its mission is to contribute to the economic independence of developing countries. To fulfil this mission, CBI aims at strengthening the competitiveness of companies in those countries on international markets, primarily the West-European market, by improving conditions in enterprises and business support organisations. CBI considers social values and compliance with the most relevant environmental requirements to be an integral part of its policy and activities

CBI offers various programmes and services to its target groups:

Market information
- CBI News Bulletin (6 times annually);
- CBI guide “Exporting to the European Union”;
- Market surveys and strategic marketing guides covering the EU including The Netherlands;
- Manuals on subjects such as, trade fair participation, Fashion Forecast etc.;
- CBI’s extensive Web site at www.cbi.nl providing general information about CBI, details about CBI programmes, CBI publications (downloadable free-of-charge) and the AccessGuide database on European non-tariff trade barriers;
- CBI’ s Trade Documentation Centre offering demand-related information such as market information, trade magazines, address books of European companies etc.

Matching services
CBI’s computerized exporters’ and importers’ databases, containing regularly updated company profiles, are instrumental in providing buyers and suppliers with relevant company data on potential trade partners.

Export development programmes (EDP)
Step-by-step approach providing intensive assistance to selected exporters in developing countries in order to obtain a firm and lasting position on the EU market. Made to measure, demand- driven and flexibility are combined with fixed elements such as:
- pre-selection of candidates based on written documentation;
- technical assistance during company visits and distance guidance by CBI branch experts;
- export marketing training (for instance through the EXPRO seminars);
- market entry (for instance via participation in European trade fairs);
- market consolidation by way of follow-up support, further technical assistance and/or repeat market entry activities.

Human resources development
- BSO MARKET INTEL: five-day seminar in Rotterdam for relevant middle management staff of BSO’s, aiming at supporting BSO’s in establishing or improving a Market Information Service (MIS);
- CAPITA: two-week seminar in Rotterdam for specific industry & trade associations. Aims to provide –through their associations- specific industries or sectors in developing countries with tools to engage in business relations with importers and/or manufacturers in the EU;
- BSO-FAME: two-week seminar in Rotterdam for project managers of BSOs focusing on practical knowledge and applicable tools in export promotion to international markets in general and the European market in particular;
- IntFair: two-week seminar in Rotterdam for BSO staff members on the organization of collective participation in European trade fairs;
- Expro: seven-day seminar in Rotterdam on export marketing and management for selected exporters participating in a CBI export promotion programme;
- Workshops in developing countries: 2-4 days for BSOs and/or exporters, focussing on general export marketing and management, a specific product sector or on specific subjects.

Multilateral co-operation
CBI co-operates with the International Trade Centre (ITC/WTO) to globalize trade promotion and with other European import promotion organizations to increase efficiency and effectiveness by combining efforts.

Please write to us in English, the working language of the CBI.

Centre for the Promotion of Imports from developing countries
Centrum tot Bevordering van de Import uit de ontwikkelingslanden

Mailing address:
CBI
P.O. Box 30009
3001 DA Rotterdam
Phone +31 (0) 10 201 34 34
Fax +31 (0) 10 411 40 81
E-mail cbi@cbi.nl
Internet www.cbi.nl

Office and showroom:
WTC-Beursbuilding, 5th Floor
37 Beursplein, Rotterdam, The Netherlands.

Mailing address: P.O. Box 30009, 3001 DA Rotterdam, The Netherlands
Phone: +31 10 201 34 34 Fax: +31 10 411 40 81
E-mail: cbi@cbi.nl Internet: http://www.cbi.nl
Office and showroom: WTC-Beursbuilding, 5th floor
37 Beursplein, Rotterdam, The Netherlands