EU MARKET SURVEY 2002

LEATHER GARMENTS

CENTRE FOR THE PROMOTION OF IMPORTS FROM DEVELOPING COUNTRIES

EU MARKET SURVEY 2002

LEATHER GARMENTS

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REPORT SUMMARY

Introduction

This market survey gives a profile of the market for leather garments in the EU and is an updated version of a former EU Market Survey, published in January 1999. This survey is published at the same time as another CBI publication: EU Strategic Marketing Guide for Leather Garments.

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 organisations. Furthermore statistical market information on consumption, production and trade, and information on trade structure and prices and margins is provided.

Market research

This EU Market Survey and the (accompanying) 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).

This EU Market Survey is an example of secondary data. 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 have 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 Leather', a fairly complete overview is given to manufacturers/exporters in developing countries, who wish to sell to the EU market. Seasonal fashion information can be obtained from CBI's Fashion Forecasts. Some of these sources of information are also available on the CBI web site.

Product groups

The products discussed in the survey "Leather Garments" are mainly leather jackets and coats and to, a much lesser degree, other leather garments like trousers, skirts, shirts, waistcoats, dresses and body-warmers. Items such as hats, gloves, belts and similar articles are not discussed. Information on some of these items may be obtained from the CBI and ITC reports on "Leather goods".

Besides by type of product, the market for leather garments can be divided into combinations of the following criteria:

Leather used	– variety of origin (sheep/lamb, goat/kid. pig/piglet, cow/calf etc.)
Finishing techniques	– variety of finish (suede, split, shammy or chamois, nappa, nubuck etc.)
Quality/price ratio	– low, medium (sometimes classified into lower and higher medium) and high
Fashion	– based on materials, style and colour, a difference can be made in classic fashion, casual fashion and highly individualistic fashion
End users	– women's and men's wear and to a lesser degree children's wear
Functional aspects	– some categories of consumers prefer functional aspects above fashion aspects in leisure and/ or profession, like motorcycle drivers (protective aspects) and sexual activities (gay and SM scene).

Market size

Total EU consumption of leather garments amounted to US$ 6.5 billion (€ 7.1 billion) in 2000.

Consumption peaked in 2000: a fall of 6.3 percent in 1999 was followed by a growth of 13.1 percent in 2000.

Germany remained the most important country for leather garments consumption in the EU. However, the difference with other major countries, like the UK, France and Italy has become much smaller.

Four countries (Germany, UK, France and Italy) account for just over 70 percent of EU leather garments consumption.

The share of leather garments in total clothing consumption is highest in Scandinavian countries, mainly caused by sales of jackets and coats influenced by climatological circumstances.

Increased EU consumption in 2000 can be ascribed to the following developments:

- In many EU countries the demand for traditional wear is declining in favour of casual and leisurewear, including leather garments in a sporty and casual style; but also
- Dressy models, particularly in women's leather garments are being increasingly sold; and.
- Young people show a growing interest in leather garments. They consider leather as a natural product, which does not require excessive care and is a way to acquire prestige and personality.

Production

Italy is the dominant leather-clothing producer in the EU with almost 49 percent of total production, followed by France with 18 percent. More than 80 percent of the EU leather garment industry is concentrated in four countries, besides Italy and France, UK and Spain (both countries each 7%).

The EU's Outward Processing Trade (OPT) for leather garments decreased in the period 1998-2000 to US$ 12.4 million (€ 13.5 mln). OPT for leather garments was limited; 92 percent of all imports concerned direct imports. Almost 65 percent of total OPT came from Central and East European countries (CEECs), mainly from Hungary and Poland.

The most important OPT countries outside Europe were Pakistan, China and at distance followed by India.

Imports

Total EU imports of leather garments amounted to US$ 1,665 million (€ 1,807 mln) in 2000.

Germany remained the leading importer, with an import share of 32 percent in terms of value, followed by the UK (15%), France (13%), Spain (9%) and Italy (8%). The Netherlands (6%) ranked sixth, followed by Austria and Belgium (each less than 4%).

EU imports of leather garments decreased 4 percent in the period 1998-2000. Developments in imports of leather garments depends on several factors like exchange rates, size and structure of domestic production of outerwear, the possibilities and volume of re-exports, and developments in demand and vary strongly per EU country. Imports in The Netherlands, Germany, Belgium, Greece and Austria decreased strongly (24-37 percent), while imports in Ireland, Denmark, UK, Portugal and Spain boomed (41-68 percent).

Developing countries play a dominating role in EU imports of leather garments: leading suppliers of leather garments were China and India, both countries covering 21% of total EU imports each, followed by Turkey (13%) and Pakistan (12%). In terms of value about 73 percent of total imports came from developing countries, 22 percent came from other EU countries and half of the remaining 5 percent came from CEECs.

Imports from ACP countries were very limited.

The biggest increase in exports to the EU was for developing countries in Asia (Pakistan, China, India) and the Mediterranean (Morocco, Turkey), although total imports from the latter were almost four times smaller in terms of value. Other countries with important growth in exports to the EU were CEECs (Hungary, Romania, Slovenia) and Uruguay.

With regard to factors like cost levels and distances, the following competitive categories in leather garments can be distinguished:

- **Low-cost, long-distance countries:** these countries specialise in low-priced, high-volume, low and medium fashion and standard types of products with a fair quality. These products are mainly made to buyers' specifications in countries in the Far East (China, Vietnam and South Korea) and South East Asia (India, Pakistan and Indonesia) and to a much lesser degree South America (Uruguay, Argentina and Brazil).
- **Low-cost, medium-distance countries:** these countries supply medium fashion products, sometimes made as OPT. The main sources are Mediterranean countries like Turkey and to a much lesser degree Morocco and CEECs like Hungary, Romania, Poland, Slovenia, Croatia and Bosnia/Herzegovina.
- **High-cost countries:** these countries supply quality fashion characterized by frequent deliveries, small quantities and sophisticated materials, which are difficult to obtain in low-cost countries. Western European countries and USA belong to this category.

EU imports from developing countries increased by 11.5 percent in the period 1999-2000, which can be ascribed to the following reasons:

- Imports from CEECs increased by 19 percent, mainly caused by much higher imports from Bosnia/Herzegovina and to a lesser degree from Slovenia and despite decreased imports from Croatia
- Imports from Mediterranean countries rose 9 percent, which is below the average growth. Imports from Morocco grew strongly, however, imports from Tunisia fell.
- Growth in imports from Asian developing countries accounted for 12 percent. Pakistan exported almost 25 percent more in 2000 than in the year before, while imports from South Korea and Vietnam decreased. Imports from the leading suppliers China, India and Indonesia rose around 11 percent.
- Imports from other developing countries were very limited.

The four leading supplying countries of leather garments to the EU: China, India, Turkey and Pakistan were also the leading suppliers of Germany, The Netherlands, France and UK. Italian imports came mainly from India and to a much lesser degree from China and Turkey, while Pakistan ranked 15th

Exports

EU exports of leather garments amounted to US$ 749 million (€ 814 mln) in 2000, of which 37 percent went to countries outside the EU. The most important destination outside the EU remained the USA with 28 percent of total extra-EU exports in 2000, followed by Switzerland (22%) and Japan (15%). Other destinations were Russia, Hong Kong, Andorra, Czech Republic and Norway. Exports to USA increased considerably in the period 1999-2000, while other countries accounting for strongly increased exports were Japan, Switzerland, Hong Kong, Russia and Norway 41 percent of total EU exports were accounted for by Italy, 20 percent by Germany, 12 percent by France, 7 percent by Spain and 5 percent by The Netherlands.

Trade structure

The bulk of the trade in leather garments is handled through one of the following intermediaries in the importing countries:

- **Manufacturers;** some EU leather garment manufacturers are also importers; they cannot themselves produce all the garments in the quality and price ranges required by the consumer market, owing to limited production possibilities and high costs.
- **Agents;** the sales agent is an independent intermediary between the (foreign) manufacturer and the retailer or retail organisation.
- **Wholesalers;** wholesalers can be specialised in leather garments or combine leather garments with other product groups mainly outdoor clothing.
  Contrary to the agent, the wholesaler purchases from manufacturers and holds stocks at his own risk.
- **Retail organisations;** retailers constitute the final stage before products reach the consumer.
  In this survey, a distinction is made between department stores, clothing multiple stores, textile supermarkets or discount stores, mail-order houses and independent retailers (clothing specialty stores, leather garments speciality stores etc.).
  Other categories are grocery supermarkets, street markets etc.

Distribution channels on retail level are differ greatly across the EU member states. The UK has a high concentration of distribution, which is reflected in the relatively low market share of independent retailers. The southern member states, Portugal, Italy and Spain, however, have high market shares for independent retailers. These retailers buy mainly from manufacturers and wholesalers/importers, contrary to Germany and The Netherlands for instance, where many independent retailers are members of buying co-operations.
In many European countries, the distribution of leather garments can be divided into two main groups:
more generally oriented department and variety stores, clothing multiples and hypermarkets, and specialised leather garment stores, mainly independent retailers.
Most of the major retail organisations set up their own buying organisations in low-labour-cost countries.
This means that retailers are able to bypass domestic wholesalers and/or manufacturers.

Opportunities for developing country exporters

Developments in consumption, production and trade in leather garments in the major EU countries open up opportunities to manufacturers in developing countries to start or to expand their exports to these countries.
According to the forecasts, further increase in leather garments expenditure can be expected. There has been an increased focus on casual and leisure wear, which will be continued for the coming years.
Possibilities for exporters in developing countries still remain dependent on an increased attention to quality and reliability in deliveries. Effective competition by developing countries requires knowledge of the legal, technical, quality and fashion requirements.
In addition, they must make resources available, not only to monitor and understand developments in the target countries, but also to ensure that quality requirements are strictly met.
Production strategies for exporters in developing countries can be either concentrated on increasing volumes, based on experience and trying to obtain a higher degree of efficiency in production, or shifting production profiles and specialise in higher-value products. Both production strategies have to be combined with the recommendations mentioned earlier.
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. For that reason, co-operation in a variety of forms between importer and exporter can be necessary.
The most important determining factors for exporters operating on this basis are the combination of price, product quality and reliability of deliveries and delivery times. More further-reaching forms of potential co-operation are joint ventures and co-makership agreements

1 PRODUCT CHARACTERISTICS

1.1 Products

The products discussed in this report are mainly leather jackets and coats and to a much lesser degree other leather garments like trousers, skirts, shirts, waistcoats, dresses and body-warmers. The most important category is all different kinds of leather jackets which are estimated to take up more than 85 percent of the EU market under study. The remainder is mainly coats but also trousers, skirts, leather tops, body warmers and waistcoats, which at present are very much in fashion. However, this is a wave motion. Items such as hats, gloves, belts and similar articles are not discussed. Information on some of these items may be obtained from the CBI and ITC reports on “Leather goods”.
Besides by type of product, the market for leather garments can be divided into combinations of the following criteria:

Leather used	–	variety of origin (sheep/lamb, goat/kid. pig/piglet, cow/calf etc.)
Finishing techniques	–	variety of finish (suede, split, shammy or chamois, nappa, nubuck etc.)
Quality/price ratio	–	low, medium (sometimes classified into lower and higher medium) and high
Fashion	–	based on materials, style and colour, a difference can be made in classic fashion, casual fashion and highly individualistic fashion
End users	–	women’s and men’s wear and to a lesser degree children’s wear
Functional aspects	–	some categories of consumers prefer functional aspects above fashion aspects in leisure and/or profession, like for motorcycle driving (protective aspects) and for sexual activities (gay- and SM-scene).

The latter three criteria mentioned will be discussed in chapter 3.

Leather used
The material – type of leather – used determines for a large part the price category in which the article will be sold. In general, the term hides is used for the whole pelt from large animals (cattle, horse, etc.), in contrast to the term skin, the pelt of young (like calf and lamb) or small (like goat and sheep) animals. Cattle hide, general term for hides before tanning from a bovine of any breed or sex, usually mature, includes bull hide, steer hide, cowhide, and sometimes kip skin. Lamb and sheepskin (with or without wool), cowhides, calfskins, goatskins and pigskins are all used for leather garment production and all have their own characteristics.

Finishing techniques

Suede:	Leathers that are finished by buffing the flesh side (opposite to grain side) to produce a nap. Term refers to the napping process, and is unrelated to the type of skin used.
Split:	The underneath layer of side leather which has been “split” off. Devoid of a natural grain, it may be either sueded or pigment finished and embossed. The top layer of the hide, which contains the markings known as grain are called “full grain leather”. When the hide is split into three layers, the middle and the bottom layer are known as split leather.
Chamois:	The product of oil-tanning the underneath layer (called a flesher) that has been split from a sheepskin. The chamois tanning method employs train oil, most often cod liver oil. The process is extremely labour intensive, and this is what makes chamois leather so expensive in comparison with chrome-tanned leather.
Nappa:	Commonly used as a synonym for “grain leather”, or any smooth garment leather. Technically the term refers to sheepskin tanned in such a way that the underside of the hide has the appearance of grain leather rather than suede.
Nubuck:	A brushed grain-sueded leather; grain-sueded is a buffing process to raise the fibres on the grain side of a hide or skin to produce a velvet-like effect, known as “nubuck” leather. Different finishing techniques can give nubuck leather a dry, oil or wax appearance.

Novelty skin types are:

Patent leather:	Any leather treated with a waterproof film, on one surface; the treated surface is lustrous and reflective.
Pearlised leather:	Any leather that has been given a coloured, pearl-like luster.
Embossed leather:	Any leather that has a motif in relief; the embossing is achieved with a metal template, heat, and pressure.
Printed leather:	Skins that have been silk-screened or painted.
Distressed leather:	Skins that have been treated to look worn and rough; manufacturers achieve this either by a mechanical process or by screen-printing.

Quality/price ratio
The better the quality of a hide of skin, the less it has to be treated. The number and severity of defects in the surface of the hide or skin determine quality.
The fewer holes, abrasions, and stains, the higher the grade. Grade isn't an indication of how wearable the leather is, but is based upon the skin's visual appeal and the percentage of the skin or hide that can be used. Higher grades have more usable area. Leather is a natural product and some imperfection will always be present. There are definite differences in quality between hides and skins from different countries. Buffalo, goat and pig leather are, because of price and quality, mainly sold in the lower price category, which is the higher volume market. The major categories of leather in the EU market are:
Steer, cow or calf leather: garment cow, plongé, calfskin, suede, nappa and nubuck cover several segments. Thinner and supple plongé is a top grain cow with wonderful drape and cover the high segments.
Cow or calf is relatively inexpensive and is strong and durable. The larger size of the hide means less piecing of a pattern and less waste. A thickness of 0.8-1.2 mm (which can be compared with 2- to 3- ounce weights in the USA, where leather thickness is expressed as the weight in ounces per square foot) it is often used for jackets, coats and pants. Nappa covers the lower and nubuck the higher part of the mid segment.
Pig and hog: primarily suede is the least expensive of the garment leathers. It is available in many grades, colours and weights. Pig suede up to 0.6 mm in thickness (1.5 ounces in weight), is suitable for shirts, pants, skirts, jackets and vests.
Sheep and lamb: nappa leather, suede, chamois, shearling and mouton. Lambskin, or nappa lamb, is especially soft and is suitable for jackets, coats, pants, skirts and dresses. Lamb suede has a good draping quality; it fells like silk and is used for blouses, pants and skirts. Chamois is sometimes used for garments and is quite stretchy. Shearling and mouton are tanned with the wool intact. Lamb is more expensive than cow and is available in thickness of 0.8 mm or less (2 ounces or less in weight).
Goat and kid: primarily soft leathers. Goatskin is soft but very strong. It is moderately priced and available in 0.8 mm thickness. Its beautiful grain and soft feel make it an excellent choice for jackets.

1.2 Customs/statistical product classification

The classification system used for both Customs and statistical purposes in EU member countries is the Harmonised Commodity Description and Coding System (HS). In general the number clearly identifies a specific product and it is possible to see whether the garments concerned are for men or women and how they are made. Unfortunately, only one number is available for leather garments. Therefore no distinction can be made between the actual types of products and whether they are for men or women.
The Harmonised System number for articles of apparel of leather or composition leather is: 42.03. 1000.

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 5 of these countries will become members in 2003.
In 2000, the size of the EU population totalled 376.5 million, of which two-thirds in the age category 15-64 years.

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 became subdivisions of the euro and continued to circulate as legal tender until 2002. Circulation of euro coins and banknotes started on 1 January 2002 and these will gradually replace national currency notes and coins, which had to be withdrawn by 1 July 2002.

On 1 January 1999, statistical and contractual values in ECU were converted into euro (€) on a 1:1 exchange rate. The euro/US$ exchange rate stood at the end of June 2002 at US$ 0.9820 for one euro.
The euro is the basic currency unit used to indicate value in this market survey, while most recent years are also expressed in euros.

Table 2.1 Overview population and age groups in the EU at 1 January 2000

	Total population in millions	0-14 years in %	15-64 years in %	65 years and older in %	Yearly average growth in % 1988-1998
Austria	8.1	17	68	15	0.6
Belgium	10.2	18	66	16	0.3
Denmark	5.3	18	67	15	0.3
Finland	5.2	19	66	15	0.4
France	59.3	19	66	15	0.4
Germany	82.2	16	68	16	0.5
Greece	10.5	16	68	16	0.4
Ireland	3.8	23	66	11	0.3
Italy	57.7	15	68	17	0.1
Luxembourg	0.4	19	67	14	1.1
Netherlands	15.9	18	69	13	0.5
Portugal	10.0	17	68	15	0.0
Spain	39.4	16	68	16	0.2
Sweden	8.9	19	64	17	0.5
United Kingdom	59.6	19	65	16	0.3
EU (15)	**376.5**	**17**	**67**	**16**	**0.4**

Source: Eurostat

Table 2.2 Exchange rates of EU currencies in US$, 1995-2001

Country	Currency	1995	1996	1997	1998	1999	2000	2001
European Union	ECU	1.29	1.25	1.13	1.12	-	-	-
	€					1.065	0.922	0.900
Austria	Ash	0.099	0.094	0.082	0.081	0.077	0.068	0.065
Belgium	Bfr	0.034	0.032	0.028	0.028	0.026	0.023	0.022
Denmark	Dkr	0.18	0.17	0.15	0.15	0.14	0.12	0.12
France	Ffr	0.20	0.20	0.17	0.17	0.16	0.14	0.14
Finland	FM	0.23	0.22	0.19	0.19	0.18	0.16	0.15
Germany	DM	0.70	0.66	0.58	0.57	0.54	0.47	0.46
Greece	GRD	0.43	0.41	0.36	0.34	0.32	0.28	0.27
Ireland	I£	1.60	1.60	1.52	1.42	1.38	1.20	1.17
Italy	L	0.61	0.65	0.59	0.58	0.55	0.48	0.46
Netherlands	NLG	0.62	0.59	0.51	0.51	0.48	0.42	0.41
Portugal	Esc	0.67	0.65	0.57	0.56	0.53	0.46	0.45
Spain	Ptas	0.80	0.79	0.68	0.67	0.64	0.55	0.54
Sweden	Skr	0.14	0.15	0.13	0.13	0.12	0.10	0.10
United Kingdom	GB£	1.57	1.56	1.64	1.66	1.62	1.51	1.45

Source: CBS Statline (January 2002)

The most recent yearly Eurostat trade statistics quoted in this survey are from the year 2000. These figures 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 following countries besides the EU in total: Germany, UK, France, The Netherlands and Italy. The three first countries mentioned are the major importers of leather garments in the EU, followed by Spain, Italy and The Netherlands. The ranking in order of consumption is Germany, UK, France, Italy, Spain and The Netherlands. Italy is leading producer and exporter in the EU followed by Germany.

3 CONSUMPTION OF LEATHER GARMENTS

3.1 Market size

EU

Total EU consumption of leather garments amounted to US$ 6.5 billion (€ 7.1 billion) in 2000. Consumption peaked in 2000: a fall of 6.3 percent in 1999 was followed by a growth of 13.1 percent in 2000. An overview of consumer spending on leather garments in the EU by country is given in table 3.1. Germany is still the most important country in consumption of leather garments as well as in total clothing consumption in the EU. However, the difference with other major countries, like the UK, France and Italy has become much smaller. Four countries (Germany, UK, France and Italy) account for just over 70 percent of EU leather garments consumption.

The share of leather garments in total clothing consumption is highest in Scandinavian countries, mainly caused by sales of jackets and coats influenced by climatological circumstances.
Increased EU consumption in 2000 can be ascribed to the following developments:

- In many EU countries the demand for traditional wear is declining in favour of casual and leisurewear, including leather garments in a sporty and casual style; but also
- Dressy models, particularly in women's leather garments are being increasingly sold; and
- Young people show a growing interest in leather garments. They consider leather as a natural product, which does not require excessive care and is a way to acquire prestige and personality.

Germany

Germany is the largest market for leather garments in the EU because of its large population, which amounted to a total consumption of US$ 1,457 million (€ 1,582 mln) in 2000. While the German clothing market declined over the period 1998-2000, sales of leather garments increased in 2000 by 4.5 percent after a fall of 12 percent in the previous year. Imported leather garments dominate the German market, as domestic production has declined in the face of the low prices maintained by products from outside the EU.

Table 3.1 Consumer expenditure on leather garments in EU-countries, 1998-2000 (in US dollar and Euro)

	1998	1999	2000		Total clothing expenditure 2000	Leather garments expenditure in % of total clothing
	US$ mln	US$ mln	US$ mln	€ mln	US$ billion	
Austria	209	202	198	215	5.0	3.96%
Belgium	260	218	257	279	7.6	3.38%
Denmark	114	114	138	150	3.2	4.31%
Finland	82	78	93	108	2.2	4.22%
France	872	791	997	1,082	30.1	3.31%
Germany	1,589	1,394	1,457	1,582	43.9	3.32%
Greece	104	96	98	100	4.3	2.28%
Ireland	52	55	71	77	2.0	3.55%
Italy	932	921	938	1,018	32.6	2.88%
Luxembourg	9	9	11	12	0.3	3.67%
The Netherlands	304	264	332	360	8.6	3.74%
Portugal	58	60	73	79	2.9	2.52%
Spain	396	403	483	524	16.4	2.95%
Sweden	152	150	172	187	4.1	4.20%
United Kingdom	1,021	1,010	1,202	1,305	33.0	3.64%
EU (15)	**6,154**	**5,765**	**6,520**	**7,078**	**196.2**	**3.33%**

Sources: Retail Intelligence, Eurostat and OETH

Table 3.2	Consumption of leather garments in Germany, 1998-2000 (in US$ million)		
	1998	**2000**	**% change 1998/2000**
Leather coats and jackets for			
– men	673	621	- 7.7 %
– for women	635	581	- 8.5 %
Other leather garments for			
– men	64	58	- 9.4 %
– for women	217	197	- 9.2 %
Total leather garments	**1,589**	**1,457**	**- 8.3%**

The fall in consumption was higher in terms of value than in terms of volume. This indicates much lower prices, caused by factors like a more liberal attitude in clothing behaviour by the German consumer (wearing of clothing does not depend on the occasion), resulting in an increased focus on casual wear.
Items like jeans, other casual trousers and knitwear are often combined with leather jackets and are expected to continue their good performance. In general, demand for traditional formal wear is declining as casual wear and leisurewear have become more popular.
Compared with other EU consumers, German consumers are particularly aware of environmentally friendly products and their ecological responsibility. This has led to an increased demand for clothing made from natural fibres including leather. The strongest growth in the coming years is expected in the casual and leisure segments. For the latter, active seniors and to a lesser degree women are interesting target groups.

The Netherlands

The total market for leather garments in The Netherlands can be estimated at US$ 332 million (€ 360 mln) in 2000 (retail prices), of which 87 percent concerns coats and jackets.

Table 3.3	Consumption of leather garments in The Netherlands, 1998-2000 (in US$ million)		
	1998	**2000**	**% change 1998/2000**
Leather coats and jackets for			
– men	155	162	+ 4.5%
– for women	111	126	+ 13.5%
Other leather garments for			
– men	12	12	+ 0.2%
– for women	26	32	+ 23.1%
Total leather garments	**304**	**332**	**+ 9.2%**

The above-mentioned figures concern men and women including children, but leather clothing for children has a very limited share. Most of the items sold in The Netherlands are jackets; 93 percent of all leather garments sold to men are jackets. The other products concern mainly trousers, coats and waistcoats.
For women, 84 percent of all leather garments sold are jackets and coats. The other 16 percent concern trousers, skirts, vests, and to a lesser degree dresses.

The following developments can be noticed in the demand for leather garments in the period 2000-2002:
- Sales of men's leather jackets, coats and lammies, increased in particular in autumn 2001 and a further increase for 2002 is expected; favourite colours remained black and brown.
- Sales of women's leather garments increased during 2000 but to a much stronger degree in 2001. Coats were most popular by women older than 35. Short tailed jackets, either or not combined with leather trousers, were also popular. Less popular were leather items like skirts, shirts, indoor jackets (blazers) and suits. Favourite colours besides the traditional leading black remained the other basics brown and beige. Other important colours became Bordeaux, purple and olive green.
- Younger women (under the age of 20) prefer leather-look (mainly) polyester in jackets, trousers and skirts, but this is often a matter of price.

France

Total spending on leather garments amounted to US$ 997 million (€ 1,082 mln) in 2000, of which 86 percent concerned coats and jackets. Leather jackets for men and boys decreased by 0.4 percent in volume, which indicates 8.4 percent higher prices in 2000 than in 1998. Prices for women's jackets and coats were 8.8 percent higher, while number of sales rose by 12.4 percent.

Table 3.4 Consumption of leather garments in France, 1998-2000 (in US$ million)

	1998	2000	% change 1998/2000
Leather coats and jackets for			
– men	412	445	+ 8.0%
– for women	341	417	+ 22.3%
Other leather garments for			
– men	34	37	+ 8.8%
– for women	85	98	+ 15.3%
Total leather garments	**872**	**997**	**+ 14.3%**

Consumers appear to be less guided by impulse and tend to be more rational in their purchasing. Fashion plays an important role in purchasing decisions of leather garments in particular for women. Sales of jackets and coats as well as other leather garments like trousers, shirts, skirts, vests etc. increased considerably. A lesser growth is expected for the coming years.

Italy

Developments in Italian consumption of leather garments are rather stable. In the period 1998-2000, total consumption fell 1.2 percent in 1999 and rose 1.8 percent in 2000 to US$ 938 million (€ 1,018). More detailed figures about consumption are not available.
The Italian consumer can be considered as most stylish and have good taste, compared with other EU consumers, followed by French and Spanish consumers. The role of designers (high priced) clothing is decreasing but still important and higher than in countries like Germany, The Netherlands and UK. The main emerging trend is towards casual/sportswear.

United Kingdom

The total consumption of leather garments in 2000 in the UK amounted to US$ 1202 million (€ 1,305 mln). The UK remained the second biggest market in the EU behind Germany. Imported leather garments dominate the UK market, as domestic production has declined in the face of the low prices maintained by products from outside the UK and unfavourable exchange rates have prevailed. Just like in many other EU countries, retail sales of leather garments increased considerably.

Table 3.5 Consumption of leather garments in UK, 1998-2000 (in US$ million)

	1998	2000	% change 1998/2000
Leather coats and jackets for			
– men	512	586	+ 14.4%
– for women	373	456	+ 22.3%
Other leather garments for			
– men	40	43	+ 7.5%
– for women	96	117	+ 21.9%
Total leather garments	**1021**	**1202**	**+ 17.7%**

Recent years have seen a trend towards purchasing casual wear for the office and leisurewear for home, and away from buying formal wear. However, formal wear still represented a higher part of the market in the UK than in other major EU countries.

3.2 Market segmentation

The general criteria for market segmentation of leather garments are:

- by gender – women/girls and men/boys
- by age – children's wear and adults (16+), the latter are often divided into age groups in several ways, for instance 16-29, 30-49, 50 and older
- by leather types and finishing techniques
- by type of product, and
- by type of activity resulting in specific clothing behaviour.

Socio-demographics

The size and age structure of the population is one of the basic determinants of how much will be spent on clothing. Table 2.1 in the previous chapter showed the composition by age groups of the population in the EU.

Although this may appear to be a rough method for categorising the market, it is interesting because:

- generally speaking, different age categories have different clothing behaviour, and
- developments within the various age categories can be followed, by comparing results with projections.

The EU population has a declining birth rate and an ageing population. In the selected EU countries, the category below 20 years decreased considerably. The categories 40 and older increase substantially. In 2000 about 40% of the total population was older than 45. As the "baby boom" generation becomes older, we see the population as a whole becoming "greyer", apparent in the number of senior citizens above 55 years of age.
In general can be said that leather clothing for children (2-14 years) mainly covers jackets based on classical items for adults, like bomber jackets, motorbike jackets, lammies etc. Younger people are less interested in leather garments, because of the relative higher prices and the often low budget for clothing for this age group (students etc.). The age group 25-55 years is the largest group in absolute terms and in volume.
They buy leather clothing in all price categories depending on several factors, while the group older than 55 years is mostly looking for better quality (cow and sheep) and attractive designs, made possible by a high disposable income.

Segmentation by product
Most of the items sold in the EU are jackets. The other products are coats, trousers, skirts and to a lesser degree dresses, shirts, vests, shorts etc.
Leather garments can be divided into fashion products and/or functional products. Fashion products can be divided into three categories:

1. Classic fashion: mostly in traditional colours and models with slight variations. Low budget products as well as expensive items are made in this category. Products like the bomber jacket, the flight jacket etc. belongs to this category.
2. Casual fashion: mass-bought fashion especially worn by young people.
3. Highly individualistic fashion: trendy people following the latest developments in fashion. The use of materials and colours is dictated by fashion.

It has to be noted that changes in fashion are not so frequent in the leather garment sector as in the textile garment sector.

Examples of functional products are specific products for motorcyclists, like jackets, trousers and coveralls. These products are made from heavier leather quality for protective reasons. In this sector, however, fashion influences are noticed too.

Segmentation by price/quality ratio
In terms of product quality, retail price level and related brands, the market for leather garments can be divided into four segments: the luxury segment, the middle segment often divided into an upper and a lower part, and a lower (cheap) segment.
The trend towards looking for higher quality and more expensive products in the leather garments sector has increased in recent years. The consumer remains price-conscious, but to an ever-greater extent looks for higher-quality materials as well as fashionable trends. This makes product quality the most important purchase criterion, followed by design and appearance. Although this trend is growing, the middle price segment with a market share of 60-75 percent continues to dominate. The segments naturally overlap each other, but it is possible to identify the key characteristics, which distinguish them. Figure 3.1, at the right, gives the main features of each segment.

Brand names in the luxury segment are among others Versace, Gucci, Dolce & Gabbana, Armani, DKNY, Valentino with price ranges of € 750-1300 (sometimes even higher) for jackets and coats. Brand names in the upper middle segment are among others Hugo Boss, Diesel, Timberland, Pall Mall, Marlboro Classics, Mc Gregor, Closed, Nivola, La Matta, Schott etc. with a price range of € 350-750. The middle price segment covers a variety of private labels of clothing multiples, variety stores and mail-order houses with a range of about € 125-300 and brand names like Arma, Dept, Summum, Easy Way etc. with a range of € 200-375.
It has to be noted that many brand names cover the whole middle price segments for instance with a price ranges of € 250-700, like Transmission, Mancharey, DNA, Ofset, Futuro etc.
The products in the lowest category with prices less than € 125 are mainly sold without a brand name, fancy brands or strongly discounted brand names.

Segmentation by functional aspects
Consumers can prefer several functional aspects of leather outerwear above fashionable aspects, for reasons like protection against cold, rain etc. Specific leather clothing is bought by users mainly for prospective reasons, like motorcycle drivers. They buy leather clothing for protection against weather circumstances and accidents, while leather garments and other attributes are also popular with SM lovers, fetishists, certain homosexuals etc. Characteristics of these latter segments will not be discussed in this survey.

Figure 3.1 Major segments in the leather garments market in terms of price/quality ratio

Purchase criteria	Store choices
Luxury segment (market share approx. 5-10 percent)	
– Exclusive luxury and designer brands – High quality materials – Brand-name goods with image effect	– Exclusive retail stores – Boutiques – Manufacturer's direct stores – Special departments in department stores
Upper-middle price segment (market share approx. 20-25 percent)	
– Brand-name goods – High quality materials – Fashion themes – Broad range in colours and design	– Independent speciality shops – Department stores – Specialised mail order
Middle price segment (market share approx. 40-50 percent)	
– Good quality – Smaller range in colours and design – Fashionable	– Independent speciality shops – Clothing multiples – Variety stores – Mail order
Mass consumer price segment (market share approx. 20-25 percent)	
– Inexpensive products – Special sales/offers – Basic quality – Very limited range in colours and design	– Variety stores – Discounters – Super- and hypermarkets – Street markets

3.3 Consumption patterns and trends

Demand for leather garments is, like in the case of clothing, a function determined by factors like demographics as discussed above.
Other factors are among others: income and spending power, priorities in consumer choices, developments in fashion, brand awareness and preferences, climate and environment.

Income and spending power
Improving consumer confidence, growth in employment, and lower interest rates were the main factors leading to increased total consumer spending since 1996. For the coming decade, all EU countries will see significant increases in living standards, from which the poorer southern EU countries will benefit as a result of an increase in foreign direct investment from multinational companies. Labour markets are more flexible and both temporary and part-time work is on the increase, while state services are being privatised.

Priorities in consumer choices
There are significant differences in consumption habits in the varying EU countries, due to differences in culture, traditions and tastes. Clothing including leather garments accounted for 5.5 percent of household expenditure in the EU in 2000, while this percentage was still more than 6 percent in 1990.

Consumer expenditure was higher on sectors like health, housing/energy, transport/communication and leisure/education activities.

In 2000, spending on clothing was higher than the EU average in Italy, Germany, the UK and The Netherlands, while it was lower than the EU average in France. Italian consumers devote the highest share of expenditure to clothing, at 7.1 percent in 2000. The UK showed a remarkable growth in the last decade in spending on clothing, but household expenditure on clothing declined in the review period just like in most other countries.

Table 3.6 Shares of spending on clothing, 1990-2000

	1990	2000
EU	6.1	5.5
The Netherlands	5.0	4.3
Germany	7.2	5.7
France	5.1	4.4
Italy	7.5	7.1
UK	4.4	5.6

Source: Derived from several statistics

Life styles

Today, two consumers of the same age, same family structure and same income may have extremely different life styles, reflected in different buying habits and product preferences. Clothing, more than ever, serves as the means of expression of personality. Character, ideas and attitude to life will be emphasised by the way a person dresses. Combination fashion is eminently suited to expressing a personal style.
Today, consumers set priorities in their pattern of expenditure according to their life style.
The increasingly individualistic nature of society will bring about a rise in demand for goods with an expressive value. People do not mind spending their money on such goods, while for products with a lower priority, a low price is the main criterion.
The consequence of the above is that the consumer expects retailers to have a clear image.
In order to meet these consumer demands, many clothing stores are going in for upgrading and on the other side textile supermarkets maintain their operating on discount level. This will be discussed in more detail in chapter 7 ‘Trade structure’.

Fashion trends

More than any other colour, black is positioned as a base. The worldwide trend to more ‘sports and casual wear’ has affected the leatherwear segment in particular for men. A trend towards more feminine and refined silhouettes in supple leathers for women is expected for 2003. Children’s fashion was oriented on the “adult look” during recent years and can be described as ‘tough’. In this trend there was space for a material like leather, mainly in jackets and coats. For the coming years, this trend will not disappear completely, however, there will be a new trend towards more childish fashion based on fantasy, magic and humour.
The trend in jeans and sportswear is dressing down.
A rough, relaxed clothing style as a reaction to the glamour and glitter of the last years. Key words are haute bohemia (among others a new hippy look with lammies), radical ecology (leather and lammy with a second-hand look, materials acrickled, grazed or oily-handled), tough sensuality (with black as dominating colour and leather as dominating material), men’s jackets are short (above the hip and derived from motor cross jackets as introduced by Gaultier) and cheerful sporty (very bright colours, lightweight materials without usage of leather). The classical fashion for men is mainly jackets, lammy is very important just like stonewashed and waxed calf leather and nubuck. Leather coats are mainly trench coats.

For current and detailed fashion information on short terms, we refer to CBI fashion forecasts. Suppliers in developing countries should follow the trends, expressed by designers on international catwalks, and take up certain elements in their sample collection.

Climate and seasonal aspects

Generally spoken, weather has an impact on the timing of expenditure, which tends to be highly seasonal. About 80 percent of leather garments is sold in autumn/ winter while the remaining part in spring/summer covers relatively more suede. The assortment of leather clothing specialty stores (multiples and independent retailers) is very limited or zero in summer months.
In the EU there are two distinct seasons in which collections of most types of merchandise are sold, namely spring-summer (mainly skirts, shorts, brassieres, jackets etc. are sold) and autumn-winter (long coats, lammies, jackets and trousers are sold).

4 PRODUCTION OF LEATHER GARMENTS

4.1 Production in the EU

Due to high labour costs and competition from imported leather garments, the number of manufacturers declined considerably in the last decades. The remaining manufacturers are trying to improve their level of production in order to reduce the effects of competition. Most of the leather garments manufacturers are export-oriented, concentrate on top-quality output and need the best raw material. The EU industry of leather garments is very specialised and manufacturing capacities are the highest in Italy followed at a distance by France, Spain, UK and Germany. Modern machinery is an essential asset of the tanning sector.

The restructuring policy of many manufacturing companies in the EU during the last two decades led to relocation of the clothing production. The foreign policy of clothing companies takes many forms. However, it is possible to identify three basic concepts: Outward Processing Trade (OPT), Cut, Make and Trim (CMT) and Sourcing from Own Design (SOD). As to OPT, only the most labour intensive piecework such as sewing and packing has been relocated. For the sake of quality control, the whole handling of fabrics or leather, including dyeing and printing, is retained in the EU home country. The same goes for the quality control and the distribution to the customer. CMT indicates a further step in the relocation. Here the whole manual production has relocated, and the material purchase is held on to for efficiency and quality reasons.
The quality control has been relocated too and is typically managed by travelling controllers.
SOD concentrates 100 percent on knowledge-intensive parts of the production process. The suppliers abroad receive complete specifications on design, quality of the fabric or leather, accessories and other materials etc. Subsequently, they manage the purchase of the raw materials themselves. This form is most usual to the largest design and trade houses, wholesalers, and the profile chains of retail trade and a minority of the manufacturing companies. The form of CMT is frequently employed in an estimated 50 percent of the clothing companies in countries like Sweden, Denmark, The Netherlands and Germany; the OPT form is used by 30 percent and SOD accounts for about 20 percent of companies in the clothing industry in the four countries mentioned.
The foreign policy gives EU manufacturers the possibility to maintain control over the management and quality of the outsourcing operations and to respond quickly to changing market demands. Most of the largest companies entered joint ventures in low-cost countries or have built up their own factories abroad. OPT in leather garments will be discussed in chapter 4.2., while in chapter 5 total imports including OPT, CMT and SOD will be discussed.

EU clothing production continued to fall in 2000. However, at 5.0 percent, the fall was only about half as much as in 1999. In that year output plummeted by 9.6 percent the biggest drop in the whole of the 1990s. The number of employees in the apparel sector fell by 3.7 percent in 2000 to 1.5 million, of which around a third is active in the knitwear sector. The number of enterprises decreased too. After a sharp decline in the EU's turnover in clothing production in 1999, the value of production increased in 2000, despite the fall in volume. Reasons for these gains were increased consumption in the domestic market and increased exports to the USA and some Asian markets encouraged by the weak position of the euro, which has created a buyer's market.

Table 4.1 EU clothing production structure, 1997-2000

	1997	1998	1999	2000	% change 2000/1999
Total employment ('000)	1726.4	1623.4	1558.5	1500.1	- 3.7
Number of enterprises ('000)	90.5	85.9	82.6	79.9	- 3.3
Investment (US$ billion), current prices	7.30	7.49	6.55	6.85	+ 4.6
Turnover (US$ billion), current prices	99.1	100.9	97.1	100.3	+ 3.3

Source: L'Observatoire Europeen du Textile et de l'Habillement (OETH)

Table 4.2 EU production of leather garments in volume and value, 1998-2000

	1998		1999			2000		
	'000 units	US$ mln	'000 units	€ mln	US$ mln	'000 units	€ mln	US$ mln
Italy	3,482	527	3,405	465	495	3,475	453	492
France	1,216	195	1,170	162	173	1,225	167	181
UK	631	100	548	75	80	524	63	68
Spain	578	85	526	68	72	513	68	74
Germany	269	43	223	32	34	195	29	31
Other (10)	881	130	908	109	116	954	148	161
EU	**7,057**	**1,080**	**6,780**	**911**	**970**	**6,886**	**928**	**1,007**

Specific figures for the production of leather garments are not available, however, figures based on apparent consumption are given in table 4.2. EU production decreased 9 percent in the period under review to 7 million units, while average prices rose 7.4 percent in the same period. It can be estimated that the volume of production covered 5 percent coats, 60 percent jackets and 30 percent trousers and skirts.
Overall, EU manufacturers have been moving away from the production of bottom-of-the-range garments towards middle to top of the range products, while subcontracting the manufacture of more basic items abroad.

Italy is the dominant leather-clothing producer in the EU with almost 49 percent of total production, followed by France with 18 percent. More than 80 percent of the EU leather garment industry is concentrated in four countries, besides Italy and France, UK and Spain (both countries each 7%).

4.2 EU Outward Processing Trade

The EU's OPT for leather garments decreased steadily in the period 1990-1996, from € 26 to 11 million, followed by a growth in 1997 to € 15 million but fell again in the period 1998-1999. A rise of 15 percent in 2000 resulted in a total of € 13.5 million (US$ 12.4 mln). OPT appeared to constitute less than 8 percent of EU clothing imports in 2000.
The fall in the period 1998-1999 was mainly due to the fact that, since 1 January 1998, all clothing imports from the CEECs have been liberalised, and OPT is no longer necessarily statistically recorded as such.

OPT for leather garments was limited; 92 percent of all imports concerned direct imports. Almost 65 percent of total OPT came from CEECs: 7 percent from developing countries and the remaining 58 percent from other CEECs. Most important, besides the two leading partners (Hungary and Poland) were Romania, Bulgaria, Croatia, Serbia Montenegro, Russia and Slovakia. OPT trade

Table 4.3 Developments in OPT in total and by major trade partners in US$ millions, 1998-2000

	1998 € '000	1999 € '000	2000 € '000	Leading trade partners in 2000
EU	13,121	11,800	13,545	Hungary (32%), Pakistan (13%), China (12%), Romania (7%)
Italy	2,078	4,249	6,900	Hungary (61%), Poland (21%), Romania (14%)
Germany	8,496	4,962	3,468	China (32%), USA (15%), Croatia (15%), Serbia Montenegro (6%)
UK	818	1,427	1,735	Pakistan (99%)
France	762	1,028	1,274	Bulgaria (45%), China (39%), Slovakia (10%)
Spain	93	80	109	Morocco (100%)
Other (10)	874	54	59	Poland (72%)

Source: Eurostat

from CEECs into the EU decreased by 5 percent in the period 1998-2000, despite growing imports from Hungary, Poland, Romania, Bulgaria and Slovakia. The decrease was mainly caused by much lesser trade with Croatia and Serbia Montenegro. The most important OPT countries from outside Europe were Pakistan, China and, at a distance, followed by India. OPT trade with the first-mentioned countries increased considerably, while trade with India decreased to the same degree. 29 percent of EU's OPT trade came from Asian developing countries in 2000, while this percentage was 23 percent in 1998.

5 IMPORTS OF LEATHER GARMENTS

5.1 Total EU imports

Before we take a look at the import figures for leather garments 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, explaining that official statistics are not always all embracing and should be interpreted with care. Chapter 5 covers imports for the period 1998-2000. There is only one statistical number available for leather clothing in official trade statistics. For that reason, no distinction can be made between types of products and whether they are for men and boys or women and girls.

EU

Total EU imports of leather garments amounted to US$ 1,665 million (or € 1,807 mln) in 2000. Germany remained the leading importer, with an import share of 32 percent in terms of value, followed by the UK (15%), France (13%), Spain (9%) and Italy (8%).
The Netherlands (6%) ranked sixth, followed by Austria and Belgium (each less than 4%). EU imports of leather garments decreased 4 percent in the period 1998-2000. EU countries can be divided, according to developments in value of imports during this period, into:

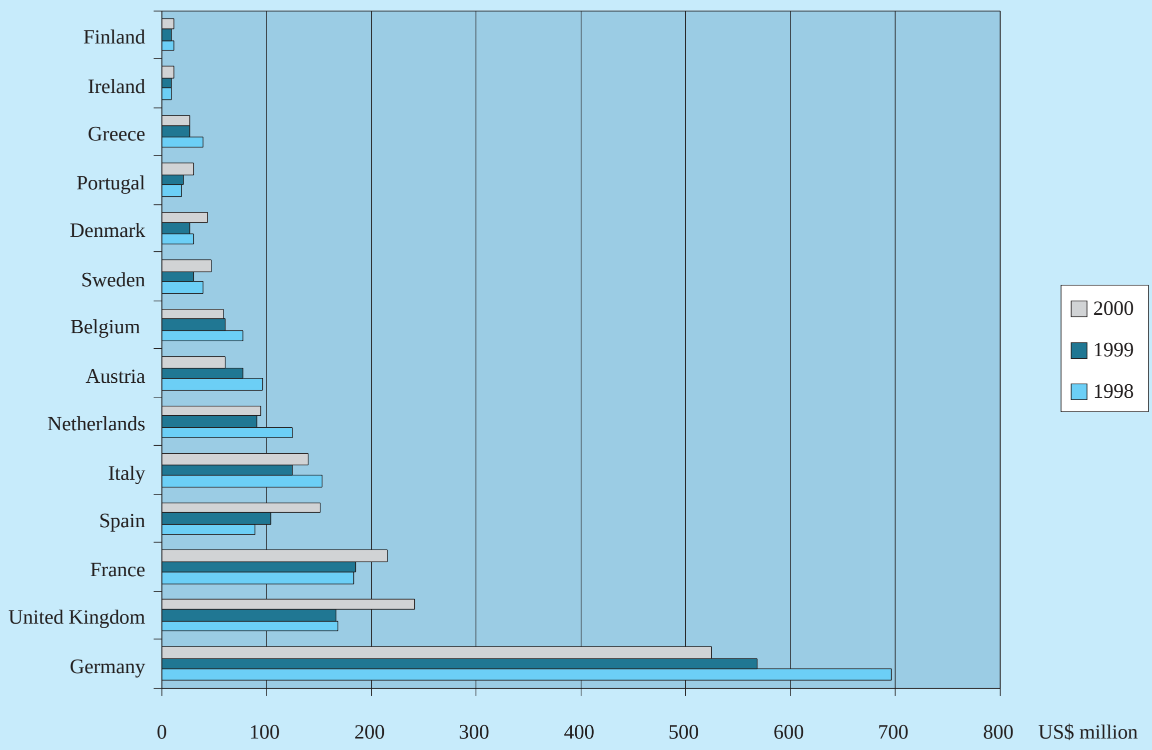
- Strongly decreased (24-37 percent) imports in The Netherlands, Germany, Belgium, Greece and Austria;
- Slowly decreased (-8 percent) imports in Italy;
- Slow growing imports (+2 percent) in Finland;
- Strongly growing imports (18-19 percent) in France and Sweden
- Booming (41-68 percent) imports in Ireland, Denmark, UK, Portugal and Spain.

Developments in imports of leather garments vary strongly per EU country. This depends on several factors like exchange rates, size and structure of domestic production of outerwear, the possibilities and volume of re-exports, and developments in demand as described in Chapter 3.1

5.2 EU imports by area of origin

Developing countries play a dominating role in EU imports of leather garments. In terms of value about 73 percent of total imports came from these countries, 22 percent came from other EU countries and half of the remaining 5 percent came from CEECs. Intra-EU trade accounted for 22.7 percent in 1998 but decreased to 21.6 percent in 2000. The dominating import share

Figure 5.1 EU imports of leather garments by country, 1998-2000



Source: Eurostat (2001)

Table 5.1 Imports of leather garments into the EU by area of origin, 1998-2000

	1998 tons	1998 € million	1998 US$ million	1999 tons	1999 € million	1999 US$ million	2000 tons	2000 € million	2000 US$ million
Total imports	**42,615**	**1547.5**	**1734.7**	**46,400**	**1408.4**	**1499.9**	**47,818**	**1807.3**	**1664.5**
of which from:									
EU	6,060	350.7	393.1	11,337	317.2	337.8	10,862	389.9	359.1
Developing countries:									
– ACP	4	0.3	0.3	0	0.0	0.0	4	0.1	0.1
– Central & East Europe	515	25.0	28.0	364	17.8	19.0	402	24.5	22.6
– Mediterranean	3,392	205.6	230.5	3,484	196.9	209.7	3,847	247.5	227.9
– Asia	31,096	888.8	996.3	29,733	803.6	855.8	30,967	1040.8	958.6
– Central & South America	75	4.0	4.5	102	4.6	4.9	129	5.9	5.4
– Other developing countries	0	0.0	0.0	1	0.0	0.0	0	0.0	0.0
Total developing countries	**35,082**	**1123.7**	**1259.7**	**33,684**	**1022.9**	**1089.4**	**35,349**	**1318.8**	**1214.6**
Other countries:									
– Western Europe	39	5.4	6.1	46	7.5	8.0	51	18.4	16.9
– Central & East Europe	856	44.9	50.3	834	42.3	45.0	1,098	57.8	53.2
– North America	168	10.5	11.8	198	8.5	9.1	148	11.2	10.3
– Asia	401	11.9	13.3	290	9.5	10.1	304	10.7	9.9
– Other	9	0.5	0.6	11	0.5	0.5	6	0.5	0.5
Total other countries	**1,473**	**73.2**	**82.1**	**1,379**	**68.3**	**72.7**	**1,607**	**98.6**	**90.8**

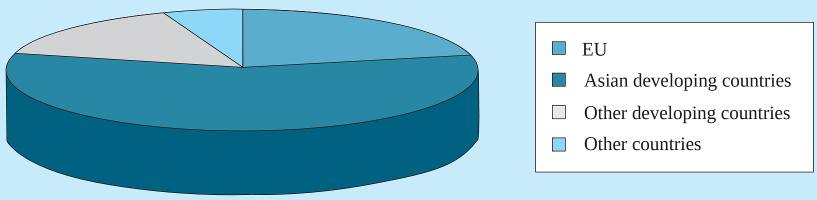
Source: Eurostat

of developing countries increased very slightly: from 72.6 percent in 1998 and 1999 to 73.0 percent in 2000, which indicates that imports from non-developing countries showed a significant growth from 4.7 percent of total imports in 1998 to 5.4 percent in 2000, mainly caused by growing imports from Switzerland, Poland and Hungary.

Imports from EU countries increased in 2000 compared with 1999, but by less than the average growth. Imports from countries like Denmark, Spain and Italy showed a considerable growth, while imports from countries like Germany and The Netherlands stagnated and imports from Belgium decreased not only in terms of US dollars but also in euro, as can be derived from Appendix 1 (table 1.2). Imports from ACP countries were very limited. The biggest increase occured for developing countries in Asia (Pakistan, China, India, Sri Lanka and the Philippines) and the Mediterranean (Morocco, Turkey), although total imports from the latter were almost four times smaller in terms of value. Other countries with important growth in exports to the EU were Slovenia, Hungary, Romania, Bosnia & Herzegovina, Ukraine and Uruguay.

EU leading suppliers of leather garments were China and India, both countries covered 21% of total EU imports each, followed by Turkey(13%) and Pakistan (12%). Six EU countries followed the top four: Germany, Italy, France The Netherlands, Spain and UK. South Korea became the EU’s 11th supplier of leather garments. Other sources of imports from outside the EU were Switzerland, Hungary, Romania, Indonesia, Poland, Slovenia, Vietnam, USA and Morocco.

Figure 5.2 EU imports of leather garments by area of origin in 2000



Source: Eurostat (2001)

Sources of EU imports
With regard to factors like cost levels and distances, the following competitive categories in leather garments can be distinguished:

Low-cost, long-distance countries: these countries specialise in low-priced, high-volume, low and medium fashion and standard types of products with a fair quality. These products are mainly made to buyers' specifications in countries in the Far East (China, Vietnam and South Korea) and South East Asia (India, Pakistan and Indonesia) and to a much lesser degree South America (Uruguay, Argentina and Brazil).
Low-cost, medium-distance countries: these countries supply medium fashion products, sometimes made as OPT. The main sources are Mediterranean countries like Turkey and to a much lesser degree Morocco and CEECs like Hungary, Romania, Poland, Slovenia, Croatia and Bosnia/Herzegovina.
High-cost countries: these countries supply quality fashion characterized by frequent deliveries, small quantities and sophisticated fabrics, which are difficult to obtain in low-cost countries. Western Europe (Germany, Italy, France, The Netherlands, Spain, UK, Belgium and Switzerland) and USA belong to this category.

5.3 Total imports by selected markets within the EU

Germany

Germany remained the largest EU importer of leather garments in 2000 with a value of US$ 524 million (€ 569 million), of which 92 percent was sourced outside the EU. Of the total imports of leather garments, 89 percent came from developing countries.

German imports decreased by 18.5 percent in terms of value in 1999, followed by a decrease of 7.6 percent in 2000 (in terms of US$); a fall of 24.7 percent was registered over the whole period 1998-2000.

Imports from EU countries decreased considerably: 45 percent in the period 1998-2000, of which neighbouring country Austria showed the biggest fall. Imports from France and The Netherlands decreased too, while imports from Denmark increased.
Imports from the leading EU supplier Italy decreased 32 percent in 1999 and levelled off in 2000 (+ 3%).
The four leading exporters to Germany were the developing countries China, India, Pakistan and Turkey. Imports from the countries mentioned decreased, of which China fell from US$ 207 million in 1998 to 158 million in 2000. The number of major developing countries with growing exports to Germany was limited, of which can be mentioned Croatia, Slovenia and Uruguay.

China was the leading exporter of leather clothing to Germany in the period 1998-2000, valued at 30 percent of total German imports. Other suppliers were India (21% of total imports in 2000), Turkey (20%), Pakistan (9%), Italy (4%), Vietnam (2%) and South Korea (2%). Other countries with exports to Germany with a value of more than US$ 4 million were The Netherlands, Denmark, Slovenia, Croatia, Indonesia and Hungary.

United Kingdom

The UK is the second largest EU importer in terms of value and accounted for 15 percent of the Community total imports of leather garments in 2000.
Imports amounted to US$ 246 million (€ 267 mln).
British importers sourced around 80 percent of leather garments in non-EU countries in 2000, mainly in developing countries (77% of total imports).
These percentages were respectively 76 and 74 in 1998
The UK was one of the five EU countries with booming imports of leather garments in the period 1998-2000, in terms of weight (+ 39%) and in value (+ 48%).
India (26%), China (21%), Pakistan (18%), Italy (9%), Turkey (8%) and Germany (6%) are the main suppliers to the UK. Other suppliers include France, Indonesia, Switzerland and The Netherlands.

Table 5.2 Imports of leather garments into Germany by area of origin, 1998-2000

	1998 metric tons	1998 mln US$	1999 metric tons	1999 mln US$	2000 metric tons	2000 mln US$	% change 1999-2000 in volume	% change 1999-2000 in value
Total	**15,485**	**696.8**	**14,892**	**567.8**	**13,893**	**524.4**	**- 6.7%**	**- 7.6%**
of which from:								
Other EU countries	1,019	74.9	828	52.7	619	41.5	- 25.2	- 21.3
Developing countries	14,078	604.0	13,721	495.4	12,925	464.8	- 5.8	- 6.2
Total other countries	388	17.9	343	19.7	349	18.1	+ 2.3	- 8.1

Source: Eurostat

Table 5.3 Imports of leather garments into the UK by area of origin, 1998-2000

	1998 metric tons	1998 mln US$	1999 metric tons	1999 mln US$	2000 metric tons	2000 mln US$	% change 1999-2000 in volume	% change 1999-2000 in value
Total	**8,178**	**166.8**	**8,519**	**166.0**	**11,329**	**246.3**	**+ 33.0%**	**+ 48.4%**
of which from:								
Other EU countries	3,819	39.9	4,169	37.3	4,779	49.7	+ 14.6%	+ 33.2%
Developing countries	4,318	123.3	4,288	124.5	6,449	189.3	+ 50.4%	+ 52.0%
Total other countries	41	3.6	62	4.2	101	7.3	+ 62.9%	+ 73.8%

Source: Eurostat

Imports from all major exporters to the UK increased, of which imports from China, Turkey, Pakistan and Indonesia showed the biggest growth.
Other countries with exports to the UK with a value of more than US$ 1 million were Philippines, USA, South Korea and Spain.

France

France accounted for 13 percent of EU imports of leather garments in 2000. Around 72 percent of French imports was sourced outside the EU, while 69 percent came from developing countries. These figures remained almost unchanged since 1998.

French imports of leatherwear rose18.3 percent in value (US$) terms between 1998 and 2000.
Imports from EU countries increased 10.6 percent in the period 1998-2000, of which the leading EU supplier Belgium showed a fall of almost 19 percent, while imports from Germany, UK and Spain increased.
The import share of developing countries accounted for 68 percent in 1998 and 69 percent in 2000.

Developing countries with growing exports (more than the average growth of 16.5 percent) in 2000 were: Pakistan, Morocco, South Korea and Uruguay.

In 2000, most French imports of leather garments came from Pakistan and Turkey (18% each from both countries), followed by China (17%) and India (13%).
The leading EU suppliers were Italy (8%), Belgium (7%) and Germany (6%). Other suppliers to France were Spain (3%), UK (2%), Morocco and Switzerland (less than 2 percent from each country).

Italy

Between 1998 and 2000, Italian imports decreased by 8.3 percent in terms of value (US$). During this period, imports in terms of weight decreased by 6.7 percent.
In 2000, Italy imported leather garments for US$ 139 million (€ 151 mln) of which 90 percent was sourced outside the EU and 57 percent of total imports came from developing countries.
These percentages were respectively 89 and 69 in 1998.
India (37%) was the leading supplier of leather garments to Italy in 2000, despite the decrease in imports from US$ 70.7 million in 1998 to 58.7 in 1999 and to 50.9 in 2000. Other suppliers to Italy included Romania (10%), Hungary (8%), China (6%), Poland (almost 6%) and Slovenia (5%). Imports from all these countries increased in 2000, excepted from India. The biggest growth in exports to Italy was for Romania(US$ 5.2 mln in 1999 and US$ 13.7 mln in 2000).

Table 5.4 Imports of leather garments into France by area of origin, 1998-2000

	1998 metric tons	1998 mln US$	1999 metric tons	1999 mln US$	2000 metric tons	2000 mln US$	% change 1999-2000 in volume	% change 1999-2000 in value
Total	**4,850**	**182.6**	**5,666**	**185.4**	**6,046**	**216.0**	**+ 6.7%**	**+ 16.5%**
of which from:								
Other EU countries	1,003	53.8	1,352	52.0	1,382	59.5	+ 2.2%	+ 14.4%
Developing countries	3,733	123.4	4,148	127.2	4,576	150.0	+ 10.3%	+ 17.9%
Total other countries	114	5.4	166	6.2	88	6.5	- 47.0%	+ 4.8%

Source: Eurostat

Table 5.5 Imports of leather garments into Italy by area of origin, 1998-2000								
	1998		1999		2000		% change	% change
	metric tons	mln US$	metric tons	mln US$	metric tons	mln US$	1999-2000 in volume	1999-2000 in value
Total	**2,886**	**151.7**	**2,459**	**123.7**	**2,693**	**139.0**	**+ 9.5%**	**+ 12.4%**
of which from:								
Other EU countries	130	16.3	116	13.0	128	14.3	+ 10.3%	+ 10.0%
Developing countries	2,275	104.0	1,845	82.1	1,747	79.8	- 5.3%	- 2.8%
Total other countries	481	31.4	498	28.6	818	44.9	+ 64.3%	+ 57.0%

Source: Eurostat

The Netherlands

The Netherlands ranked 6th as EU importer of leather garments with an import value in 2000 of US$ 93.5 million (€ 101.6 mln), of which 84 percent came from non-EU sources and 76 percent from developing countries. Between 1998 and 2000, Netherlands imports decreased by 24.5 percent in terms of value (US$). During this period, imports in terms of weight decreased by 29 percent.

Imports from EU countries decreased almost 37 percent in the period 1998-2000, of which the leading EU supplier Germany showed a fall of almost 25 percent. Imports from Belgium, Italy, France, Denmark and Sweden decreased to a much higher degree.

The import share of developing countries accounted for 72 percent in 1998 and 76 percent in 2000. A big fall of imports into The Netherlands in 1999 was followed by a slight recovery in 2000. Developing countries with more than averagely growing exports of 3.6 percent to The Netherlands in 2000 were: China (+6.6%), Pakistan (+6.1%), Turkey (+18.9%), Indonesia (+102%), South Korea (24.7%).
China (25%) was the leading supplier of leather garments in 2000 followed by India (16%) and Pakistan (15%), while other suppliers included Germany (12%) and Turkey (12%). Other suppliers with import shares between 2-5 percent were: USA, Hong Kong, Indonesia and South Korea.

5.4 The role of developing countries

EU imports from developing countries increased by 11.5 percent in the period 1999-2000, which can be ascribed to the following reasons:

- Imports from CEECs increased 19 percent, mainly caused by much higher imports from Bosnia/Herzegovina and to a lesser degree from Slovenia, and despite decreased imports from Croatia.
- Imports from Mediterranean countries rose 9 percent, which is below the average growth. Imports from Turkey grew 8 percent, while imports from Morocco grew strongly and imports from Tunisia fell.
- Growth in imports from Asian developing countries accounted for 12 percent. Pakistan exported almost 25 percent more in 2000 than in the year before, while imports from South Korea and Vietnam decreased. Imports from the leading suppliers China, India and Indonesia rose around 11 percent.
- Imports from other developing countries were very limited.

Table 5.6 Imports of leather garments into The Netherlands by area of origin, 1998-2000								
	1998		1999		2000		% change	% change
	metric tons	mln US$	metric tons	mln US$	metric tons	mln US$	1999-2000 in volume	1999-2000 in value
Total	**4,079**	**123.9**	**2,738**	**90.3**	**2,881**	**93.5**	**+ 5.2%**	**+ 3.5%**
of which from:								
Other EU countries	374	23.2	338	17.9	341	14.7	+ 0.9%	- 17.9%
Developing countries	3,433	88.6	2,243	64.1	2,385	70.7	+ 6.3%	+ 10.3%
Total other countries	272	12.1	157	8.3	154	8.1	- 1.9%	- 2.4%

Source: Eurostat

Table 5.7 EU imports from developing countries by country of origin, 1999-2000

	1999 US$ million	2000 US$ million	Leading suppliers in 2000 (between brackets share in total of area):
Total	**1089**	**1215**	**China (29%), India (29%), Turkey (18%), Pakistan (17%)**
Of which from:			
Asia	856	959	China (37%), India (36%), Pakistan (21%), South Korea (2 %), Indonesia (1%), Vietnam (1%)
Mediterranean	209	228	Turkey (94%), Morocco (4%), Tunisia (2%)
CEECs	19	23	Slovenia (53%), Croatia (27%), Bosnia/Herzegovina (18%)
Central & South America	5	5	Uruguay (81%), Argentina (7%), Brazil (7%)

Source: Eurostat

Table 5.8 Imports of leather garments from leading developing countries by major EU countries, 2000 (in % of value of total imports)

	1	2	3	4	5
Germany	China (30.0%)	India (20.6%)	Turkey (20.4%)	Pakistan (9.4%)	Vietnam (1.9%)
Netherlands	China (25.0%)	India (16.0%)	Pakistan (14.5%)	Turkey (11.8%)	Indonesia (3.3%)
France	Pakistan (18.3%)	Turkey (18.2%)	China (16.9%)	India (13.5%)	Morocco (1.5%)
UK	India (34.2%)	China (21.1%)	Pakistan (18.4%)	Turkey (7.5%)	Indonesia (1.9%)
Italy	India (36.6%)	China (6.3%)	Slovenia (4.6%)	Bosnia/Herzegovina (2.9%)	Turkey (2.0%)

The four leading supplying countries of leather garments to the EU: China, India, Turkey and Pakistan were also the leading suppliers of Germany, The Netherlands, France and UK. Remarkable is the distance between the import shares between the numbers 4 and 5 in the ranking. Italian imports came mainly from India and to a much lesser degree from China and Turkey, while Pakistan ranked 15th.

6 EXPORTS OF LEATHER GARMENTS

EU exports of leather garments amounted to US$ 749 million (€ 814 mln) in 2000, of which 37 percent went to countries outside the EU. The most important destination outside the EU remained the USA with 28 percent of total extra-EU exports in 2000, followed by Switzerland (22%) and Japan (15%). Other destinations were Russia, Hong Kong, Andorra, Czech Republic and Norway.
Exports to USA increased considerably: from € 47 million in 1999 to € 83 million in 2000. Other countries receiving strongly increased exports in the period 1999-2000 were Japan, Switzerland, Hong Kong, Russia and Norway. Exports to all countries mentioned increased in the period 1998-2000 but increased exports to Russia, Hong Kong and Norway followed after a strong fall in the period 1998-1999.
41 percent of total EU exports was accounted for by Italy, 20 percent by Germany, 12 percent by France, 7 percent by Spain and 5 percent by The Netherlands. An overview of exports by all EU countries is given in figure 6.1 and appendix 1.3.

Germany

German exports of leather garments decreased at an annual average rate of 10.7 percent in the period under review in US$. This fall was limited to 2.2 percent in local currency.

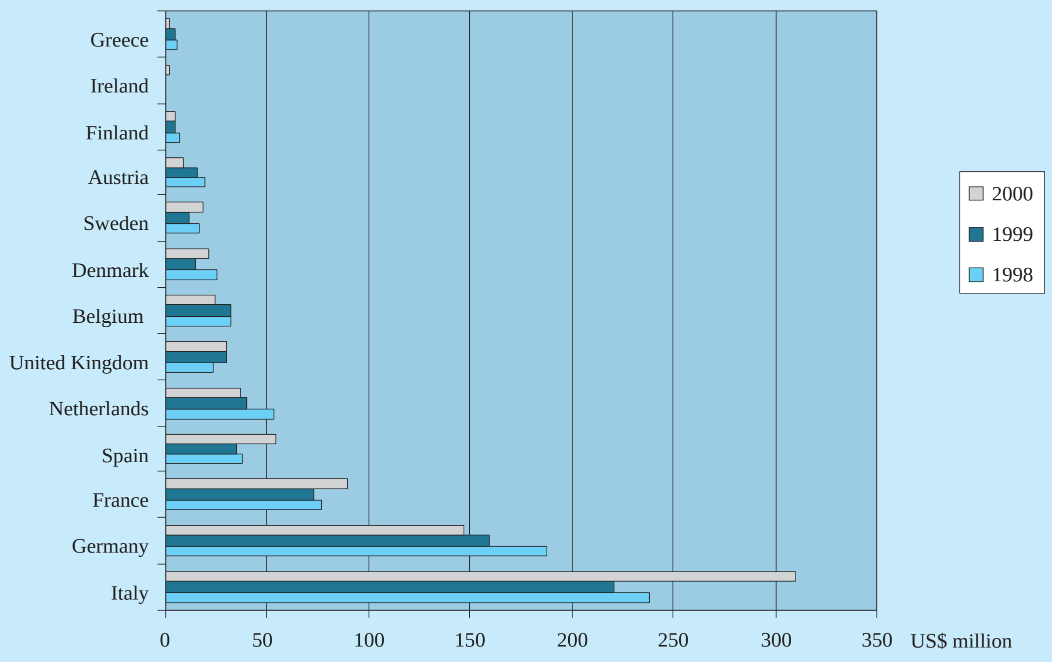
Almost 67 percent of leather garments exports (in value) goes to other EU countries. Leading destination countries in the EU are Austria (20 percent of total German exports) and The Netherlands (12 percent).

Other key destinations in the EU are UK (10%), France (8%) and Belgium (4%). The leading country of destination outside the EU is Switzerland (14%), followed by USA (5%), Russia, Japan and the Czech Republic (each country around 2%). Exports to the leading destinations varied from strong decrease (Austria) to strong increase (USA, Japan, Spain). Exports to other major countries like Switzerland, The Netherlands, Belgium and UK decreased slowly or stabilised (France).

The Netherlands

Domestic production of leather garments in The Netherlands is rather limited, which indicates the export of imported goods, i.e. re-exports. Re-exports of leather garments amounted to around 90 percent in 2000. Total exports of leather garments from The Netherlands showed a considerable decrease of 29 percent in the period 1998-2000 in US$ (in local currency 13 percent) and fell from US$ 52.7 million in 1998 to 39.6 million in 1999 and 37.5 million in 2000.

Figure 6.1 EU exports of leather garments by country, 1998-2000



Source: Eurostat

In terms of value, around 95 percent of Netherlands exports goes to EU countries, mainly Germany (32% in 2000), Belgium (18%), UK (11%), France (7%) and Portugal (6%).

Much lower exports to major destinations like Belgium, UK, Spain, Italy and Greece were the result of negative developments on the leather garments market of these countries. Exports to important destinations outside the EU were very limited: Switzerland (1%) and the Czech Republic, USA, Norway, Japan (each less than 1 %) were the leading destinations.

France

French exports of leather garments increased in (US$) value by 15.3 percent in the period 1998-2000 to US$ 88.6 million in 2000, while the value of exports in local currency increased by 40 percent.
Around 68 percent of leather garments exports (in value) went to other EU countries mainly Belgium (17 percent of the total), Spain (15 percent) and Germany (9 percent) in 2000. The leading countries of destination outside the EU were USA (8%), Japan (6%), Switzerland (6%) and Andorra (2%).

Exports to all countries mentioned were higher in 2000 than in 1998, however, exports to Germany, USA, Italy and Switzerland decreased in 1999 but were followed by a growth in 2000.

Italy

Developments in Italian export of leather garments showed the same pattern as total EU exports: a fall in 1999 and rising in 2000 above the level of 1998. Percentages in Italian exports were respectively –7 percent in 1999 and + 40 percent to US$ 310 million in 2000.
The principal destinations for Italian exports of leather garments were the USA (18% of total exports), Germany (15%) and Switzerland (10%). Half of Italian exports went to other EU countries, against 57 percent in 1999. UK ranked 4th with 9 percent of Italian exports followed by France and Japan (each 8%).

Other destinations within the EU were Spain (5%), Greece (4%), Austria, Belgium and The Netherlands (each 2%). Other destinations outside the EU were Russia, Hong Kong and South Korea.

United Kingdom

UK’s exports of leather garments increased by 34 percent to almost US$ 29 million in 1999 and fell 2 percent in 2000, caused by higher imports and an expensive local currency.
Ireland has traditionally been and still is the UK’s leading export market. Exports to Ireland grew from 22 percent of UK’s total leather garments exports in 1998 to 43 percent in 2000. More than 86 percent of leather garments exports (in value) go to other EU countries.

The most important destinations besides Ireland were France with 11 percent of total exports, Germany (8%), Greece (6%) and USA (6%), at a distance followed by Belgium (4%) Spain (3%), Sweden (3%) and The Netherlands (2%). The leading destinations outside the EU, besides USA were Japan, Pakistan and Hungary. Exports to Belgium and Greece showed the biggest growth, followed by USA, Sweden, Japan, Pakistan and Hungary, while exports to the other countries mentioned decreased.

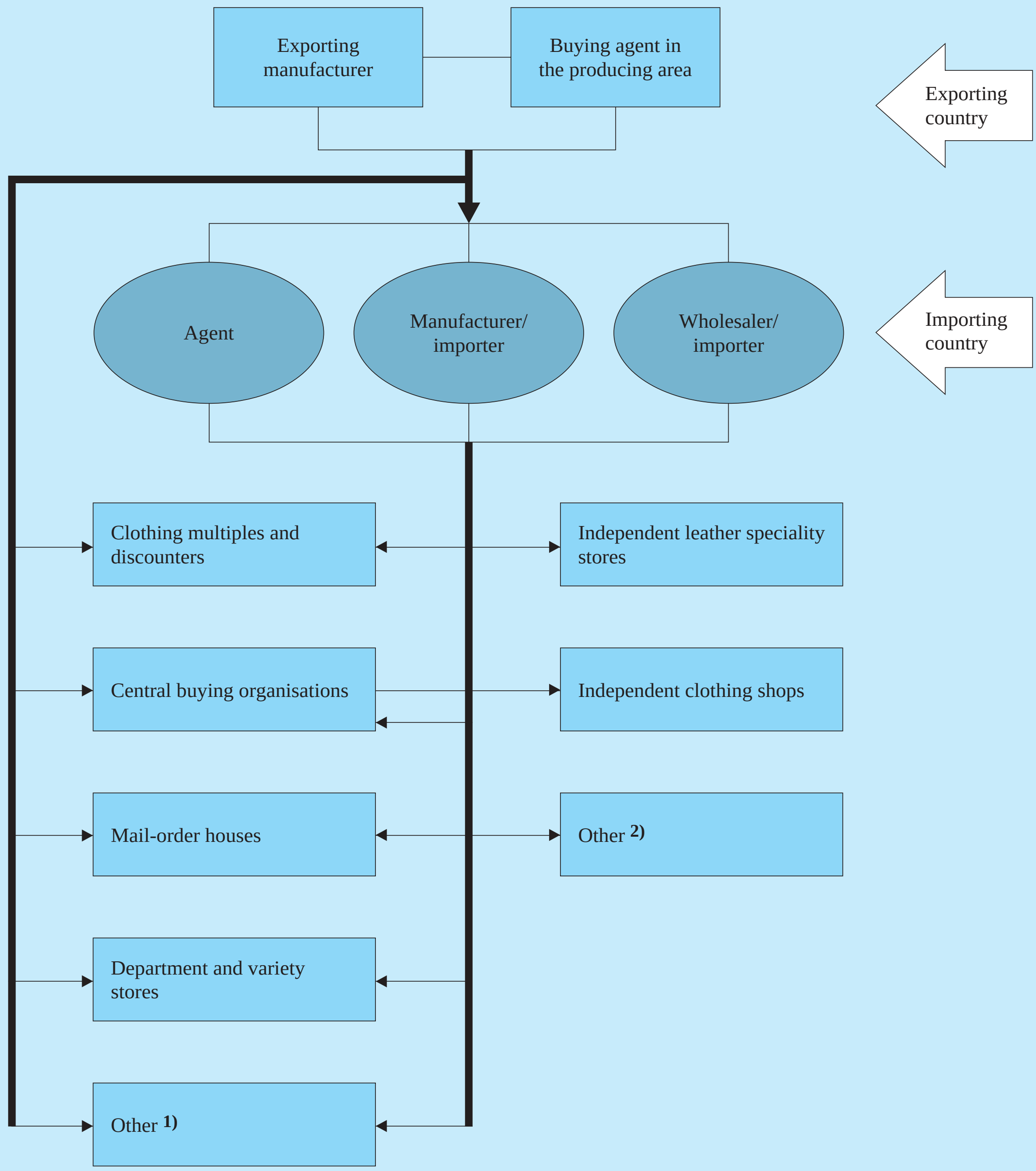
7 TRADE STRUCTURE

7.1 Introduction

Figure 7.1 shows the various kinds of exporting manufacturers and traders, agents, importing manufacturers, wholesalers and retailers.
Depending on its position in the market, the functions of a particular distribution organisation will be linked with up- or downstream organisations with the same kind of specialisation. It is also possible for a given organisation to take over (some of) the functions of the latter, in order to improve competitiveness (vertical integration). For instance, retailers may also be importers, and wholesalers may also be manufacturers.

The importing organisations play an important role in the leather garment trade, many of them specialising exclusively in the leather garment business.

Figure 7.1 Trade and distribution channels for the export and import of leather garments



1) Includes, among others, wholesalers with retail-activities like Makro and grocer super- and hypermarkets
2) Includes, among others, street markets

They maintain close contact and exchange information on products and markets with exporters. 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 the marketing and distribution characteristics of these product/market combinations. These may differ significantly from combination to combination.

7.2 Sales intermediaries

A number of leather garment manufacturers exports its products direct, without intermediaries. However, the bulk of the trade is handled through one of the following intermediaries in the importing countries.

- **Manufacturers:** some EU leather garment manufacturers are also importers; they cannot themselves produce all the garments in the quality and price ranges required by the consumer market owing to limited production possibilities and high costs. At the same time, because of keen competition, they wish to have a wide range of goods to offer.

- **Agents:** the sales agent is an independent intermediary between the (foreign) manufacturer and the retailer or retail organisation, receiving a commission from the former. The agent (or sales representative) covers a limited geographical area. The level of the commission depends on a number of factors, including the turnover rate of the product concerned, but it averages an estimated 10 percent of turnover. Most agents represent more than one manufacturer, although competition is avoided. More and more agents are starting to sell from stock, to meet their clients' short-term demands. Stock forming often takes place on a consignment basis. If the agent builds up his own stock, he is in fact functioning as an importer/wholesaler.

- **Wholesalers:** wholesalers can be specialised in leather garments or combine leather garments with other product groups, mainly outdoor clothing. Both cater to the specialist shops as well as the department stores and multiple chains. Contrary to the agent, the wholesaler purchases from manufacturers and holds stocks at his own risk. The mark-up of the wholesaler is approximately 30 percent. The development described above – an increasing number of agents acting as importer/wholesaler – is also true in reverse: many importers/wholesalers today act as agents. The fact that many independent retailers as well as purchasing combinations and multiple stores are becoming more cautious about pre-ordering, preferring to sell from stock, is reinforcing the position of the wholesaler. On the other hand, large retail companies are increasingly purchasing abroad and bypass the intermediaries.

- **Retail organisations:** retailers constitute the final stage before products reach the consumer.
  In this report, a distinction is made between department stores, clothing multiple stores, textile supermarkets or discount stores, mail-order houses and independent retailers (clothing specialty stores, leather garments speciality stores etc.).
  Other categories are grocery supermarkets, street markets etc.

Contacts with sales intermediaries can be made in several ways such as consulting trade representatives' associations, chambers of commerce, fashion centres, trade publications, trade directories etc. We refer to the appendices of this survey for addresses and other information.

7.3 Retailers

Distribution channels are very different across the EU member states. The UK has a high concentration of distribution, which is reflected in the relatively low market share of independent retailers. The southern member states, Portugal, Italy and Spain, however, have high market shares for independent retailers. These retailers buy mainly from manufacturers and wholesalers/importers, contrary to Germany and The Netherlands for instance, where many independent retailers are members of buying co-operations.
The various retailing outlets differ in the sales formula they apply, i.e. their assortment and the targeted consumer group, as well as in the way they differentiate themselves from competitors. As an aid to understanding the market, one can discriminate between "service retailing", where the retailer offers the consumer substantial added value (quality, service, fashionability, choice etc.), and "low-margin retailing", where the price-conscious consumer is offered low prices, at the expense of quality, service and so forth.
Outlets of the first kind are often referred to as being at the "upper end" of the market, the latter at the "lower end" of the market; intermediate-type outlets may be termed "mid-market".
The table below gives an overview of the relative importance of different retail outlets in the sales of outerwear including leather garments in EU member states. Specific figures for leather garments are not available.
In many European countries, the distribution of leather garments can be divided into two main groups: more generally oriented department and variety stores, clothing multiples and hypermarkets, and specialised leather garment stores (mainly independent retailers).
Most of the major retail organisations set up their own buying organisations 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 on the next page.

Table 7.1 Market shares of outerwear (including leather garments in the major EU countries, 2000	Clothing multiples [1]	Independent retailers	Department & variety stores	Mail-order	Hyper- and supermarkets	Other [2]	Total
Germany	29	29	12	13	5	12	100
United Kingdom	32	14	28	10	3	13	100
Italy	16	54	6	3	11	10	100
France	34	26	6	8	15	11	100
The Netherlands	34	32	10	5	6	13	100
Spain	18	43	14	3	12	10	100
EU (15)	27	30	13	8	10	12	100

Sources: OETH and Retail Intelligence [1] *including textile discounters and value retailers* [2] *including street markets*

Germany

The German retail-clothing market is becoming concentrated in the hands of the big firms: 15 retail companies accounted for 43 percent of the market in 2000, while their market share was 31.5 percent in 1990. The top three (Karstadt/Quelle, Otto and C&A) accounted for 22 percent of the market.
In its second year, Karstadt/Quelle realised a turnover of US$ 6 billion. The turnover of Otto stabilised at US$ 3.7 billion, while C&A Mode continued its fall to US$ 2.2 billion in 2000. These three leaders were followed by Metro, Peek & Cloppenburg, Hennes & Mauritz, Divaco (among which Kaufhalle), Edeka/AVA, Aldi, Klingel and Sinn Leffers.

According to BTE the total number of outlets with clothing in their assortment is 50,000. The number of independent clothing stores is estimated at 20,000, of which 7,000 are specialised in women's wear, 2,000 in men's wear, 7,500 have a broader range and the remaining part is specialised in another product group. Around 40 percent of the **independent retailers** is a member of a buying corporation.
In no other European country, with the exception of The Netherlands, do the buying organisations play such a significant role for specialised independent retailers as they do in Germany. The most important buying corporations are KMT-Rheintextil (Cologne) with 350 members; Katag-abz (Bielefeld) operates through 800 outlets. Other buying groups are Unitex (Neu-Ulm) with 500 members and Sütegro (Nurnberg) with 500 members.

Important general **clothing multiples** (clothing for the whole family) are C&A (184 outlets), Hennes & Mauritz (188) and Vögele (291) with buying departments in respectively Belgium/Germany, Sweden and Switzerland. Other multiples are Peek & Cloppenburg (West; 79 and North: 27 outlets), Sinn Leffers (43), K+L Rupert (37), Wöhrl (39), Boecker (20) and Hettlage (46).
Ladies' wear multiples are Appelrath-Cüpper (13), Werdin (67) and BiBa (95), all part of Douglas; Orsay (235) and Pimkie (144) from France; Jean Pascale (176); Bonita Mode (374) and Ulla Popken (276 outlets and specialised in larger sizes).
There are few men's clothing multiples in Germany of which can be mentioned: Pohland (12) and Nicolas Scholz (35). Leisure or jeans shops are, among others, Western Store Beran (209) and Werdin (70).
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 family's clothing, sportswear, underwear, nightwear, hosiery but also household textiles and beds. Textiles covered about 75 percent of total turnover and decreased from DM 928 mln in 1999 to 750 mln in 2000. Just like other discounters, NKD buys in large quantities and avoids middlemen to get low-priced goods in the shops quickly. Tengelmann's (in total 3450 outlets, of which 750 KiK clothing stores), turnover in textiles decreased from DM 865 mln in 1999 to 684 mln in 2000.
Schwarz Holding operates with among others 2,000 Lidl Discount stores and Ernsting's Family with 786 small stores (40-70 m^2) and sells clothing for the whole family under their own labels. K+L Ruppert (37 outlets with a turnover of DM 780 mln), 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.
Variety stores are Kaufhalle Mode+Sport (159 outlets and owned by Divaco) and Woolworth (338 outlets).
Mail-order companies take a significant place in the German retail market. Leading companies are Quelle, Neckermann (both from Karstadt/Quelle), Otto Versand

and Klingel. The Otto Group is the world's biggest mail-order house, due to its many foreign activities. Otto includes for instance Schwab, Witt, Heine, Sport Scheck, Alba Moda, while Zara Germany is a joint venture of Otto with the Spanish Inditex and Mexx Direkt a joint venture with Mexx Netherlands.
Other mail-order companies, like Klingel and Bader, follow Neckermann, the third mail-order company in Germany. All mail-order companies mentioned have outlets; on the other side several clothing multiples started mailing activities and have their own catalogues.

Clothing articles can be found increasingly in **super- and hypermarkets,** like: Metro (chains: Real, Extra and Kaufhof), Aldi, Edeka/AVA, Tengelmann and Rewe. Some of these retail organisations incidentally offer leather jackets.

The Netherlands

Wholesalers/manufacturers in The Netherlands are: Arma Leder (leather garments, mainly coats and jackets for men and women are sold under 9 different brand names in low, middle and high segments); Donders is active in the mid segments for men (brand name: Donar) and women (Donna-D); Emac operates in the mid and high segments for men and women (Chazz); Interstar sells mainly private labels to clothing multiples in the (lower) mid segments for men and women. For some years, Eastwood International and Sortel met financial problems, which resulted in a take-over by respectively Teeuwen and a (unknown) foreign company. Teeuwen (brand name E-Wear) is active in the mid segments for men and women, just like Trio Fashion (Billboard, Cantadore and Shapiro), Xtra Trend Leather Fashion (Moscoat) and DNA.

In The Netherlands around 12,500 outlets operate in the outerwear sector exploited by 7,300 companies, of which 62 percent can be classified as **independent retailers**. The number of speciality leather stores is limited and is estimated at about 150.

An estimated 50 percent of Netherlands independent clothing retailers are organised in central buying organisations and, to a much lesser degree, franchise organisations. The leading **buying organisations** are Euretco and Intres. Euretco Fashion is the owner of several clothing multiples, besides the buying activities for members/retailers, like Adams (40 men's wear outlets), Witteveen and Marianne Mode (both women's wear with respectively 68 and 18 outlets) and Jeans Centre (80 leisurewear outlets). Intres has women's wear formula: Essentio (42 outlets), First Lady (90) and men's wear formula: First Man (20 outlets), Lord Hamilton (52), New Bondstreet (79).

A smaller buying organisation in the higher segments of men's and women's wear is Centurion (117 outlets). Other small buying organisations are: Deco (125 outlets; men's wear and leisurewear) and Hadac (46 outlets; women's fashion).

Leading **multiple stores** in women's outerwear are M&S Mode, Miss Etam and Didi; leading chains in men and boys' outerwear are WE for men and C&A. WE is the new name for Hij (men's and boys' wear) and Zij (women's wear). In the leisure wear sector Cool Cat, Bo's and Vet are the leading retail organisations.
C&A sells clothing for the whole family in 78 outlets and operates mainly in the middle of the market, but is also active in both the upper and the lower price brackets. Market shares of C&A Nederland have decreased strongly since the entrance and expansion of foreign concerns like Hennes & Mauritz (53 outlets) and Charles Vögele (89). Marca (32 outlets) is a daughter company of C&A. Superconfex just like Bentex (part of Macintosh) operates from The Netherlands and is much more important in Belgium and France than in the mother country with its remaining 7 outlets.
Other general clothing chains are: Duthler (22 outlets, part of Hout Brox) and Fashion House Ter Stal (72).
Specialised multiples for men's outerwear are WE for men (97 outlets), Adam Herenmode (40), Setpoint (24) and Texton (30). These chains compete with the formula of the buying organisations and operate about 20 small chains with 4-10 outlets.
Men's and women's wear are sold by the chains WE (4) outlets, in the near future many stores of WE for men and Zij will be combined) and SPS Superstar (54)
The retail market for women's outerwear has many players. Important chains, operating in the mid and lower market segments are Didi Fashion (96 outlets), Sting (young fashion, 40 outlets), M&S Mode (130 outlets), Miss Etam and Promiss (respectively 120 and 52 outlets and both from the Etam-Group), Pulls (39 outlets), Witteveen (64 outlets) and Zij Mode (44 outlets).
Cool Cat (Kahn's Mode) operate with 58 outlets in the leisurewear sector and also under the name Wonder Woman with 15 outlets, expanded strongly by the take-over of Amici (101 outlets)
The Fetter Fashion Groep operates with 3 leisurewear chains: Boebies (10 outlets), Canadian Stocks (31) and Fooks (50). Other chains are: Bo's (65 outlets); Snuffel (71); Vet (50) and Steps (45).
Chains with a number of outlets between 20-30 outlets are: Boetiek 32, Van Bree, Crums, and Score.

C&A and We have a more extended collection of leather clothing than the other clothing multiple stores. The foreign chains have a very limited assortment (like Hennes & Mauritz with only 2 types of jackets in 2001) or even no leather or suede in their assortment (like Charles Vögele).

The major **department stores** in The Netherlands are Hema, V&D and De Bijenkorf. All are part of the holding company Vendex/KBB. The **variety store** Hema has 274 sales outlets, of which 23 in Belgium. Hema is market leader (in terms of volume) in such articles as bras and baby clothing, but leather is not a part of the assortment. De Bijenkorf has 7 outlets and stocks high-quality, stylish and appropriately priced products including leather garments. V&D operates in the middle of the market with 68 outlets of different sizes and sells leather garments too. Marks & Spencer closed their department stores in The Netherlands.

Discounters in textiles are often called textile supermarkets. They operate at the lower end (bottom) of the market. Their market shares vary strongly according to product group, with the focus mainly on undergarments and textile articles. In total, there are more than 800 textile supermarkets in The Netherlands. Textile supermarket chains 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). Leather garments are seldom part of the assortment of the above-mentioned textile discounters. Discounters, which originally only sold footwear like Scapino (180 outlets, part of Vendex/KBB) and Bristol (88 outlets), have expanded their assortment to include outerwear and sometimes leather garments.
This example is followed by other footwear discounters, like Schoenenreus (172 outlets) and Massa Schoen en Mode (43 outlets).

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 very low priced clothing in their assortment. Supermarket chains are Albert Heijn, Aldi, Vomar, and Edah. Only the German originated Aldi incidentally offers leather or suede jackets.

An important part of the category **'Other'** is taken by the Makro, a wholesaler with retail activities and an extended assortment of leather garments. Other retail selling outlets are "factory door" sales. Companies in this category (with the exception of the Makro) are not themselves involved in importing.

France

The structure of clothing distribution in France is slowly changing. Major developments in French clothing retail in the period under review were growth in sales of clothing multiples at the expense of independent retailers and department and variety stores. Clothing products are distributed in France by approx. 38,000 outlets, including 380 chains with 5 or more outlets. 25,000 outlets are owned by **independent retailers**, which have less than 5 active outlets.
The number of important buying organisations is limited. There are many franchise organisations in particular in the women's and children's wear market.

The market share of independent specialised retailers decreased in the period under review in favour of **clothing multiples**. The big number of specialists chains indicates that the French market is less concentrated than, for instance, the UK market.
The leading footwear retailer in France is Groupe Andre (totally 1,700 outlets), followed by footwear manufacturer and retailer Eram (totally 2,000 outlets). These companies have respectively more than 600 and 120 outlets in the clothing sector. Groupe Andre includes the women's wear chains Kookai (170 outlets, mainly franchised) and Caroll International (195 outlets) and several discount formula like La Halle aux Vetements (280).

Eram operates with l'Hyper aux Vêtements (40 outlets), Mi-temps (15) and Gemo (175). These discount stores operate respectively with clothing, sports and leisure, while Gemo combines footwear and clothing.
Etam has 380 stores in women's wear.
Etam Développement is active in many European countries, of which the most important are the UK, Belgium and Spain. The Netherlands' chain Miss Etam operates independently from the French Group.
Another group with cross border activities is Auchan Mulliez mainly with the formulas Pimkie (245 outlets), Kiabi (81) and Orsay (15). Other chains in women's wear are Promod, Camaïeu Femme and M&S Mode (from The Netherlands).

Leading men's wear chains are Jules (ex-Camaïeu Homme and 130 outlets), Devred (92 outlets), Manares (31 outlets), Burton (71 outlets) and Celio (180 outlets).Family wear chains are C&A (51 outlets), Eurodif (89 outlets), just like Zara and Mango (both from Spain), Hennes & Mauritz (from Sweden) and Gap (from USA).

The major **department store** chain in France is Galerie Lafayette (99 stores), also operating under the name Nouvelles Galeries. Another important department stores 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. Family clothing is sold by 35 stand-alone Leclerc Vêtements outlets. 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 Ecomarchéand 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 clothing sales by mail-order companies and includes stores, such as Orcanta .

UK

The structure of clothing retailing in the UK is one of the most concentrated in the world. The market share of variety stores decreased in the period under review but still accounts for 18 percent of the retail clothing sales (including market leader Marks and Spencer) and department stores a further 10. Independent specialist stores have a share of only 14%, compared with over 50% in France and Germany. Arcadia (former name Burton Group) is the UK's second largest clothing retailer after Marks & Spencer. The Arcadia Group includes the chains Top Shop, Top Man, Dorothy Perkins, Burton Menswear, Evans and Principles. Arcadia took over Sears (Miss Selfridge, Wallis and Warehouse among others) in 1999.
In the UK about 15,000 businesses operate through 32,000 outlets, of which an estimated 10,000 can be classified as **independent specialists**. There are no important buying groups active in the clothing sector.
The Arcadia Group operates with many **clothing multiple stores** (in total 2,064 outlets), like Top Shop (160 outlets), Top Man (270), Dorothy Perkins (540), Burton Menswear (380), Wallis (240), Miss Selfridge (120) and Evans (350 stores and home service activities). The Group claims a market share of 11.5 percent in women's wear.

Other general clothing multiples selling outerwear (in ranking of sales) are Next (337 outlets in the UK and Ireland and 34 elsewhere), followed at a distance by Matalan (99). C&A has been withdrawn from the UK market. Matalan is one of the fastest growing clothing retailers and offers family clothing under own label and brands against very low prices.
Other examples of these so-called value retailers are: Peacocks (300 stores), Brown & Jackson (600, of which 300 Poundstretchers), Primark (100) and Mackays (280). Women's clothing stores with leather garments in their assortment are: Etam (215), New Look (514 of which 483 in the UK), Alexon (783) and Monsoon (132).
Important (sports) multiples are, besides the market leader JJB Sports, Blacks Leisure (Blacks Outdoor, Active Ventur and First Sport), JD Sports and Allsports.
The most important **variety chain** is Marks & Spencer with some 300 stores in the UK. 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 BHS (160), active in adults' wear and even more important in children's wear, and Littlewoods (115) and Woolworth (almost 800), which ranks second after Marks & Spencer in children's wear.
Department store Debenham (90) is the UK's third largest clothing retailer and the leading department store in selling clothing. Other department stores are: 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.
ASDA (part of American Wal-Mart) accounts for almost half of clothing sales by grocers under its label George. The market share in clothing sales of the leading grocery retailer Tesco is much smaller, however, no figures are available. **Supermarkets**, notably ASDA, sell much more underwear and hosiery than outerwear.

Italy

Major developments in the Italian clothing retail trade in the period under review were growth in sales by non-specialists like super- and hypermarkets and by department and variety stores, to the detriment of independent retailers. It is expected that this development will be continued in the coming year, while an increase of clothing multiples is also expected.
The largest companies are major retailers as well as producers (Benetton, Stefanel and Luisa Spagnoli).
Big retail chains, like the Coin Group and the Rinascente Group buy directly from producers and also import.
Wholesalers play an important role in distribution, accounting for 50-60% of the purchases of retailers. Wholesalers are generally used by manufacturers of cheaper, mass-market and standardised products. Manufacturers of classic and exclusive, higher-priced clothing sell mainly directly to retailers or through their own outlets - either fully owned or franchised.

Specialised **independent retailers** dominate the Italian clothing retail sector. Specialists account for 70 percent of clothing sales. The decreasing but still important market share of independent retailers was realised by around 130,000 companies.

General **clothing multiples** with their own production facilities are Bennetton (1,900 outlets in Italy and 7,000 world wide) and Stefanel (700 in Italy and 1,200 world wide). Other general clothing chains are Bernardi (110) and Cisalfo (58).
Bimbus (part of Gruppo Coin) is a children's wear chain with 39 outlets. Leading babies' and maternity wear chain is Prénatal (175), owned by the Chicco Artsana Group. Sports chains are Giacomelli Sport (45) and, from France, Déclathon (10).
The number of foreign companies operating on the Italian market is limited, compared with the other major EU countries. Most of them are French companies, besides Déclathon there are Kookai and Cacharel.
The children's wear chain Kid Cool (60) comes from Belgian. Casual and leisurewear are sold by Levi's and Timberland, both from the USA.
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. The leading mail-order company with sales in clothing besides general goods is Postalmarket.
Hypermarkets grew in number, as did the clothing 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.

7.5 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. etc.

Most of the major retail organisations set up their own buying organisations 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 below. 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. These organisations can be considered as multiple stores or chains.

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.
Department stores combine a wide range in hardware and garments of branded goods and private labels (own assortment). Concessionaires or shop in the shops can also sell branded goods.
Contrary to buyers at clothing multiples, mail-order companies and variety stores, which have mainly or exclusively private labels in their assortment for fashionable products, divide their budgets between the purchase of finished products via direct imports from low-wage countries and sub-contracting to local or foreign companies, via outward processing trade (OPT) for the main orders (buying fabrics in Europe and Asia, for instance, and assembling production in Eastern Europe and Asia) and complemented by cut/make/trim (CMT) for re-orders.

Consumers' expectations with regard to lower prices, in particular, and tough competition have resulted in the retailer's needs for lower inventories, less out of stock and lower markdowns. Consequences for the buying policy are: fewer pre-seasonal orders; more collections per season; investment in seasonal planning and control; co-operation with suppliers (quick response/ Electronic Data Interchange/EDI) and fewer suppliers.

	BUYING	SELLING	SALES
Men's wear	August-October	Spring-Summer	July
	February-May	Autumn Winter	January
Women's wear	August-November	Spring-Summer	July
	March-June	Autumn Winter	January

Success formula like H&M and Zara are, for instance, based upon permanent replenishment and fast-moving goods.
In the EU, there are two distinct seasons in which collections of most types of merchandise are bought, namely spring-summer and autumn-winter. But there is also a constant change in styles, and in fact new styles, colours, leather qualities with different finishing are presented all year round by manufacturers and also retailers.
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; volume of business; functions or marketing services rendered; general economic conditions (booming or depressed business); competition and exclusiveness.
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 effect of low, medium and high margins on consumer end price, based on one CIF (including cost, insurance and freight) price for three different products, is shown in Table 8.1. A multiplier of between 2.7 and 4.3 on the manufacturer's price should be used to calculate an appropriate final consumer price.
Caused by factors like increasing competition at all levels in the distribution column, further concentration and integration, the factor decreased considerably in the last decade. Elimination of the wholesaler, for instance, can lead to a multiplier of 2.3-3.0 used by clothing multiples, department and variety stores and mail-order companies.
This means that exporters' CIF prices should be in the range of 23-37 percent of the final consumer price.
In absolute terms, it is more attractive for an exporter to operate in the medium and high market.
Margins vary greatly according to the type of product and the retail channel. Thus the average outerwear retailer marks goods up by 110 percent of the buying price, with selected goods retailing up to 150 percent higher than buying prices.

8.2 Retail prices

The market is intensively competitive and prices vary widely according to the product and type of outlet. In table 8.2, an overview is given of (average) retail prices in The Netherlands. Retail prices include VAT (19%).

8.3 Sources of price information

A good way to obtain information about prices and price levels in the EU is by visiting one of the major trade fairs or trade centres. Window shopping in the prospective market place, at several retail shops is another good way of getting information about prices, but also about fashion, colours and qualities.
Alternatively, an impression of average prices can be formed by browsing through the catalogues of mail-order houses, which can be found on Internet.
For instance: Neckermann Nederland:
http://www.neckerman.nl and Wehkamp:
http://www.wehkamp.nl. or similar sites in Germany like Neckermann (http://www.neckermann.de),

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
Importer/wholesaler's margin (25/30/35%)	27	32	37
	133	138	143
Retailer's margin (70/110/150%)	91	152	215
Net selling price	224	290	358
Value Added Tax (19% of net selling price **)	42	55	68
Gross selling price (consumer price)	266	345	429
RATIO CIF/CONSUMER PRICE:	**2.7**	**3.5**	**4.3**

*) *0 or 4 percent of CIF value*
**) *In practice, garment retailers calculate a 2.0-3.0 mark-up, incl. VAT. In practice, an important part of the assortment has been priced-off. In this calculation, the VAT tariff valid for The Netherlands is used, but note that the tariff varies per EU country.*

Table 8.2 Average retail prices for major leather clothing items in The Netherlands, spring/summer 2002

Women's leather garments	Prices varying from:	Colours
• ***Nappa leather***		
– coat (short model, length 90 cm)	€ 100 (size 34) - 120 (size 42,44,46)	Black
– coat (long model, length 132 cm)	€ 100 (size 34) - 120 (size 42,44,46)	Black
– coat (safari-style, length 80 cm)	€ 150 (size 36,38,40) - 160 (size 42,44,46)	Black, beige
– jacket (blazer model, length 72 cm)	€ 90 (size 36,38,40) - 95 (size 42,44,46)	Black
– trouser (inside leg length 78-80cm)	€ 77 (size 34) - 90 (size 42,44,46)	Beige, brown, black
– skirt (length 45 and 48 cm)	€ 45 (size 34) - 70 (size 42,44,46)	Beige, brown, black
• ***Pigsplit suede***		
– jacket (length 55 cm)	€ 120 (size 36,38,40) - 130 (size 42,44,46)	Light-blue, sand, coral
– Capri	€ 80 (size 36,38,40) - 85 (size 42,44,46)	Sand
– skirt	€ 80 (size 36,38,40) - 85 (size 42,44,46)	Coral, sand
– blazer (long model)	€ 120 (size 36,38,40) - 130 (size 42,44,46)	Sand, light-blue, dark-brown
Mens's leather garments	**Prices varying from:**	**Colours**
• ***Nappa leather***		
– Coat, long model	€ 189 (size 44,46) - 219 (size 56,58)	Black
– 3/4 Coat	€ 169 (size 44,46) - 209 (size 56,58)	Black
– Jacket (James Dean style)	€ 149 (size 44,46) - 179 (size 56,58)	Black
– Trouser (jeans model)	€ 89 (size 44,46) - 109 (size 56,58)	Black
– Jacket (blazer model)	€ 113 (size 44,46) - 133 (size 56,58)	Black and brown
• ***Pigsplit suede***		
– jacket (blouson model)	€ 89 (size 44,46) - 109 (size 56,58)	Cognac
– jacket (blazer model)	€ 109 (size 44,46) - 129 (size 56,58)	Cognac

Quelle (http://www.quelle.de), Otto (http://www.otto.de) or in France, like La Redoute (http://www.redoute.fr) or in the English language in the UK, like GUS/Argos (http://www.gusplc.co.uk with links to many daughter companies like http://www.argos.uk, http://www.choiceshopping.com and others), Littlewoods Home Shopping (http://www.littlewoods.co.uk) Grattan (http://www.lookagain.co.uk), Freemans and Empire Stores (http://www.empirestores.co.uk).

9 OPPORTUNITIES FOR DEVELOPING COUNTRY EXPORTERS

Opportunities in EU major markets
Consumption of leather garments in Germany increased in 2000, despite the continuing weak position of clothing in consumer expenditure. According to the forecasts, a further increase in leather garments expenditure can be expected, despite an expected slight decline in the population in the coming years.
There has been an increased focus on casual and leisure wear, which will be continued for the coming years.
Leather clothing expenditure in The Netherlands fluctuated in the last two decades and peaked in 2000.
A further but slower growth in leather clothing spending is expected in the coming years. Just like in Germany the role of leisure and casual garments will remain dominant in clothing behaviour.
Prices of leather clothing in the UK declined more in the last decade than in other EU countries, mainly caused by booming imports from developing countries.
Recent developments in retailing (C&A, M&S) in the UK are symptoms of a weak market for clothing.
A further polarisation is expected, resulting in more price competition in the form of discounting.
French consumption of leather garments increased with a larger import share of garments from developing countries, contrary to the Italian market, which is still focused on domestic high quality leather items.
The retail market remained very fragmented in Italy, with still a dominant role for independent specialists.
The role of wholesalers/importers in the EU will stabilise or slightly decline, while the role of clothing multiples and, to a lesser degree, buying groups or franchise formula and super- and hypermarkets will increase in the coming years. The buying policies of these retail channels vary, ranging from direct imports by the international operating chains to buying from wholesalers/importers or manufacturers/importers.

Advice to exporters
The role of intra-EU trade in leather garments decreased as described in this survey, however, exporters in developing countries will meet strong competition from European countries, because the importers' – in particular the organised retailers' – desired time between buying and selling has to be shorter.
This shorter lead time is necessary for the demands set by rapidly changing fashions. Another aspect is buyers preference for fashionable items from countries like Italy, France or Germany.

Possibilities for exporters in developing countries still remain an increased attention to quality and reliability in deliveries. Effective competition by developing countries requires knowledge of the legal, technical, quality and fashion requirements. In addition, they must make resources available, not only to monitor and understand developments in the target countries, but also to ensure that quality requirements are strictly met.

Some experts are of the opinion that instead of concentrating on increasing volumes, developing countries should shift production profiles to higher-value apparel 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.

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.
As mentioned above, exporters in the leather garments sector are confronted with many aspects like sizing, packaging, environmental aspects, resulting in a lot of technical requirements, added to which are aspects of design, fashionability, comfort and market developments etc. For that reason, co-operation in a variety of forms between importer and exporter can be necessary.
The most important determining factors for exporters operating on this basis are the combination of price, product quality and reliability of deliveries and delivery times. More further-reaching forms of potential co-operation are joint ventures and co-makership agreements

APPENDIX 1 EU TRADE IN LEATHER GARMENTS, 1998-2000

Table 1.1 EU imports of leather garments by country in volume (metric tons) and value, 1998-2000

	1998		1999			2000		
	metric tons	**US$ ’000**	**metric tons**	**€ ’000**	**US$ ’000**	**metric tons**	**€ ’000**	**US$ ’000**
Germany	15,485	696,800	14,892	533,135	567,789	13,893	569,382	524,401
United Kingdom	5,178	166,760	8,519	155,871	166,003	11,329	267,393	246,269
France	4,850	182,588	5,666	174,039	185,352	6,046	234,572	216,041
Spain	3,042	89,473	4,012	96,861	103,157	3,656	162,998	150,121
Italy	2,886	151,681	2,459	116,159	123,709	2,693	150,967	139,041
Netherlands	4,079	123,867	2,738	84,750	90,259	2,881	101,568	93,544
Austria	1,515	96,574	1,234	72,874	77,611	975	65,719	60,527
Belgium	1,856	77,726	1,958	56,964	60,667	1,628	63,665	58,635
Sweden	982	39,642	808	28,962	30,845	1,208	51,432	47,369
Denmark	918	30,644	756	24,327	25,908	1,157	47,682	43,915
Portugal	339	18,235	375	18,925	20,155	599	32,370	29,813
Greece	969	40,335	2,440	24,274	25,852	1,109	28,740	26,470
Ireland	169	8,613	218	8,285	8,824	280	13,161	12,121
Finland	347	11,859	276	8,556	9,111	312	13,094	12,060
Luxembourg	-	-	49	4,387	4,671	52	4,564	4,203
EU(15)	**42,615**	**1734,797**	**46,400**	**1408,369**	**1499,913**	**47,818**	**1807,307**	**1664,530**

Source: Eurostat (2001)

Table 1.2 EU imports of leather garments in volume (metric tons) and value, 1998-2000

	1998		1999			2000		
	metric tons	**US$ '000**	**metric tons**	**€ '000**	**US$ '000**	**metric tons**	**€ '000**	**US$ '000**
Total	**42,615**	**1734,797**	**46,400**	**1408,369**	**1499,913**	**47,818**	**1807,307**	**1664,530**
China	15,773	392,552	14,824	301,031	320,598	14,131	385,659	355,192
India	7,473	343,341	7,658	293,309	312,374	8,719	378,385	348,493
Turkey	3,115	220,313	3,256	186,870	199,017	3,543	233,424	214,984
Pakistan	6,226	189,642	5,682	153,416	163,388	6,629	219,791	202,428
Germany	1,361	106,035	2,580	95,164	101,350	3,534	107,463	98,973
Italy	1,173	95,545	4,951	75,225	80,115	3,719	105,135	96,829
France	521	38,645	696	33,920	36,125	768	44,284	40,786
Netherlands	1,189	55,123	1,035	30,381	32,356	713	31,382	28,903
Spain	210	17,545	222	15,427	16,430	402	24,235	22,320
United Kingdom	479	23,206	549	19,931	21,227	575	22,756	20,958
South Korea	611	29,524	603	25,596	27,260	462	22,229	20,473
Belgium	572	23,650	829	22,430	23,888	540	20,660	19,028
Switzerland	31	5,660	38	6,942	7,393	45	17,912	16,497
Hungary	242	20,436	207	14,594	15,543	247	17,448	16,070
Romania	180	8,966	175	7,838	8,347	379	16,761	15,437
Indonesia	462	15,769	354	11,380	12,120	470	14,626	13,471
Denmark	264	9,488	196	5,417	5,769	346	13,835	12,742
Poland	226	11,507	232	10,631	11,322	232	13,044	12,014
Slovenia	245	13,218	168	8,519	9,073	197	12,972	11,947
Vietnam	398	15,312	474	12,949	13,791	381	12,147	11,187
USA	121	11,126	154	8,117	8,645	122	10,806	9,952
Morocco	156	6,720	138	5,813	6,191	211	9,503	8,752
Other countries	1,587	81,474	1,379	63,469	67,591	1,453	72,850	67,094

Source: Eurostat (2001)

Table 1.3 EU exports of leather garments by country in volume (metric tons) and value, 1998-2000

	1998		1999			2000		
	metric tons	**US$ '000**	**metric tons**	**€ '000**	**US$ '000**	**metric tons**	**€ '000**	**US$ '000**
Italy	1,653	237,782	1,561	207,149	220,614	2,276	336,376	309,802
Germany	2,237	187,668	2,225	149,326	159,032	2,066	159,981	147,343
France	791	76,877	869	68,253	72,689	1,248	96,232	88,630
Spain	317	38,059	305	32,667	34,790	514	58,357	53,747
Netherlands	1,044	52,732	639	37,209	39,628	727	40,682	37,468
United Kingdom	541	22,835	1,149	28,633	30,494	894	32,465	29,900
Belgium	695	31,543	1,087	30,213	32,177	746	25,820	23,780
Denmark	574	25,225	331	13,693	14,583	530	22,529	20,749
Sweden	387	16,672	297	11,185	11,912	511	19,970	18,392
Austria	218	19,380	177	14,555	15,501	97	9,466	8,718
Finland	62	7,188	38	5,082	5,412	35	5,601	5,159
Ireland	10	626	25	460	490	53	2,374	2,186
Greece	48	5,945	38	4,425	4,713	21	2,345	2,160
Luxembourg	0	0	11	1,487	1,584	7	887	817
Portugal	19	1,664	15	1,035	1,102	7	612	564
Total EU	**8,596**	**724,193**	**8,767**	**605,372**	**644,721**	**9,732**	**813,697**	**749,415**
of which to outside the EU	**2,171**	**223,262**	**1,713**	**180,879**	**192,636**	**2,279**	**296,981**	**322,455**

Source: Eurostat

APPENDIX 2 IMPORTS OF LEATHER GARMENTS BY MAJOR EU COUNTRIES, 1998-2000

Table 2.1 **German imports of leather garments in volume (metric tons) and value, 1998-2000**

	1998		1999			2000		
	metric tons	US$ '000	metric tons	€ '000	US$ '000	metric tons	€ '000	US$ '000
Total	**15,485**	**696,800**	**14,892**	**533,135**	**567,789**	**13,893**	**569,382**	**524,401**
China	6,430	207,071	6,528	162,789	173,370	5,926	171,044	157,532
India	2,767	136,508	2,474	102,427	109,085	2,516	117,424	108,148
Pakistan	1,915	59,259	1,819	46,829	49,873	1,759	53,595	49,361
Turkey	1,683	137,462	1,628	105,025	111,852	1,663	116,099	106,927
Vietnam	303	11,296	438	11,702	12,463	351	10,943	10,079
South Korea	409	19,157	358	15,285	16,279	226	10,473	9,646
Italy	285	29,247	191	18,681	19,895	192	22,291	20,530
Netherlands	346	14,777	190	8,117	8,645	173	6,141	5,656
Denmark	116	2,859	127	2,511	2,674	146	5,340	4,918
Indonesia	216	8,851	189	6,137	6,536	135	4,933	4,543
Hong Kong	106	4,402	94	2,971	3,164	90	2,354	2,168
Croatia	91	6,271	63	3,670	3,909	88	5,310	4,891
Uruguay	32	2,063	56	2,743	2,921	86	4,035	3,716
Czech Republic	113	5,199	83	4,048	4,311	80	3,845	3,541
Poland	77	3,637	65	2,745	2,923	78	3,737	3,442
Slovenia	79	4,703	51	3,326	3,542	64	5,357	4,934
Hungary	50	4,634	44	3,613	3,848	53	4,630	4,264
Sri Lanka	19	1,825	17	1,137	1,211	37	2,318	2,135
France	48	5,217	26	3,849	4,099	37	3,533	3,254
Austria	106	10,004	105	6,887	7,335	16	1,985	1,828
Thailand	45	4,729	7	637	678	1	99	91
Other countries	249	17,630	339	18,006	19,176	176	13,896	12,797

Table 2.2 UK imports of leather garments in volume (metric tons) and value, 1998-2000

	1998		1999			2000		
	metric tons	US$ '000	metric tons	€ '000	US$ '000	metric tons	€ '000	US$ '000
Total	**8,178**	**166,760**	**8,519**	**155,871**	**166,003**	**11,329**	**267,393**	**246,269**
Italy	2,329	14,498	2,657	14,203	15,126	2,446	23,017	21,199
China	1,437	27,572	1,226	24,150	25,720	2,311	56,456	51,996
Germany	1,197	11,041	1,310	10,486	11,168	2,063	16,477	15,175
India	1,209	43,128	1,649	51,195	54,523	1,974	70,235	64,686
Pakistan	1,398	41,420	1,169	31,869	33,940	1,611	49,244	45,354
Turkey	77	4,714	78	4,269	4,546	214	20,086	18,499
Indonesia	107	2,524	44	1,628	1,734	211	5,160	4,752
France	35	4,583	144	5,277	5,620	158	7,353	6,772
Philippines	49	2,193	49	1,679	1,788	54	1,942	1,789
South Korea	18	799	45	1,294	1,378	45	1,374	1,265
Hong Kong	4	135	9	330	351	42	655	603
Netherlands	156	7,684	37	3,052	3,250	39	3,751	3,455
USA	13	1,011	19	769	819	28	1,830	1,685
Ireland	6	515	5	535	570	23	822	757
Spain	3	797	2	588	626	22	1,286	1,184
Belgium	91	620	11	728	775	21	808	744
Switzerland	2	1,092	11	1,933	2,059	12	4,450	4,098
Malta	11	137	10	83	88	12	78	72
Sri Lanka	0	0	0	0	0	9	475	437
Denmark	2	129	3	62	66	7	333	307
Taiwan	1	27	0	3	3	5	242	223
Australia	8	332	10	124	132	3	50	46
Lithuania	0	27	0	0	0	2	235	216
Other countries	35	1,784	31	1,614	1,721	19	1,034	955

Table 2.3 French imports of leather garments in volume (metric tons) and value, 1998-2000

	1998		1999			2000		
	metric tons	**US$ '000**	**metric tons**	**€ '000**	**US$ '000**	**metric tons**	**€ '000**	**US$ '000**
Total	**4,850**	**182,588**	**5,666**	**174,039**	**185,352**	**6,046**	**234,572**	**216,041**
China	1,439	33,084	1,568	29,857	31,798	1,694	39,743	36,603
Pakistan	620	20,284	792	22,919	24,409	1,168	42,824	39,441
Turkey	616	33,890	803	36,943	39,344	813	42,609	39,243
India	921	30,426	898	26,176	27,877	777	31,619	29,121
Belgium	416	18,405	746	17,571	18,713	450	16,203	14,923
Germany	145	9,648	193	10,425	11,103	287	13,283	12,234
United Kingdom	118	5,209	132	3,787	4,033	219	5,231	4,818
Spain	66	3,907	53	3,359	3,577	145	6,967	6,417
Italy	89	11,332	169	10,633	11,324	145	18,922	17,427
Netherlands	146	4,023	41	1,602	1,706	116	2,349	2,163
Morocco	35	1,994	16	1,099	1,170	54	3,453	3,180
South Korea	11	521	17	523	557	27	881	811
Bulgaria	27	1,391	32	1,487	1,584	22	867	799
USA	37	2,417	51	1,739	1,852	19	1,682	1,549
Uruguay	7	276	6	224	239	16	469	432
Indonesia	70	1,984	33	1,057	1,126	15	582	536
Hong Kong	3	267	25	552	588	10	280	258
Switzerland	3	939	5	1,545	1,645	10	3,291	3,031
Other countries	81	2,590	86	2,541	2,707	59	3,317	3,055

Source: Eurostat (2001)

Table 2.4 Italian imports of leather garments in volume (metric tons) and value, 1998-2000

	1998		1999			2000		
	metric tons	**US$ ’000**	**metric tons**	**€ ’000**	**US$ ’000**	**metric tons**	**€ ’000**	**US$ ’000**
Total	**2,886**	**151,681**	**2,459**	**116,159**	**123,709**	**2,693**	**150,967**	**139,041**
India	1,013	70,666	995	55,075	58,655	1,019	55,315	50,945
Romania	154	6,716	135	4,870	5,187	348	14,829	13,658
China	817	13,843	520	7,350	7,828	321	9,565	8,809
Hungary	178	14,614	141	10,376	11,050	188	12,559	11,567
Poland	87	6,461	123	6,976	7,429	133	8,881	8,179
Slovenia	132	6,553	104	4,685	4,990	123	7,010	6,456
Bosnia-Herzegovina	20	960	39	1,561	1,662	91	4,381	4,035
Pakistan	136	4,483	75	1,945	2,071	85	2,348	2,163
Ukraine	24	747	43	1,820	1,938	79	3,225	2,970
France	24	3,444	39	3,142	3,346	51	5,385	4,960
Tunisia	70	778	44	2,222	2,366	46	2,507	2,309
Germany	37	4,500	26	3,500	3,728	29	3,871	3,565
Turkey	24	3,109	16	1,522	1,621	26	3,048	2,807
Czech Republic	3	82	11	270	288	23	533	491
Croatia	42	2,257	19	1,105	1,177	19	1,409	1,298
Spain	15	3,167	14	2,049	2,182	18	2,619	2,412
USA	12	1,023	24	607	646	16	967	891
Netherlands	26	1,824	17	1,067	1,136	12	1,049	966
Bulgaria	6	323	5	265	282	11	636	586
Morocco	6	501	8	340	362	10	383	353
Switzerland	7	689	3	921	981	8	6,471	5,960
Hong Kong	2	131	5	232	247	7	267	246
United Kingdom	14	1,733	9	1,117	1,190	6	1,210	1,114
Belgium	4	353	2	191	203	5	443	408
Other countries	33	2,725	42	2,951	3,144	19	2,056	1,893

Source: Eurostat (2001)

Table 2.5 Netherlands imports of leather garments in volume (metric tons) and value, 1998-2000

	1998		1999			2000		
	metric tons	**US$ '000**	**metric tons**	**€ '000**	**US$ '000**	**metric tons**	**€ '000**	**US$ '000**
Total	**4,079**	**123,867**	**2,738**	**84,750**	**90,259**	**2,881**	**101,568**	**93,544**
China	1,786	37,403	920	20,614	21,954	1,020	25,401	23,394
India	553	17,807	523	14,255	15,182	495	16,283	14,997
Pakistan	726	18,081	476	12,034	12,816	464	14,762	13,596
Germany	261	15,151	253	11,755	12,519	280	12,377	11,399
Turkey	201	8,116	198	8,686	9,251	214	11,945	11,001
Hong Kong	218	5,941	118	3,477	3,703	112	3,876	3,570
Indonesia	36	1,518	52	1,440	1,534	91	3,361	3,095
South Korea	40	1,810	39	1,901	2,025	46	2,743	2,526
USA	36	5,144	26	3,723	3,965	33	4,451	4,099
Philippines	0	2	10	323	344	27	1,174	1,081
Belgium	35	2,449	23	1,444	1,538	24	972	895
Vietnam	75	2,962	20	667	710	18	745	686
United Kingdom	18	853	12	541	576	14	552	508
Italy	15	2,119	13	1,214	1,293	8	1,077	992
U.A. Emirates	0	9	0	7	7	4	117	108
Thailand	6	309	0	7	7	3	102	94
Tunisia	1	12	0	11	12	3	133	122
France	4	510	4	451	480	3	362	333
Austria	2	113	2	113	120	3	84	77
Denmark	23	995	13	342	364	3	181	167
Sweden	8	388	10	403	429	3	105	97
Other countries	35	2,172	26	1,342	1,430	13	765	707

Source: Eurostat (2001)

APPENDIX 3 TRADE ASSOCIATIONS

EU
Clothing Industry
Euratex (The European Apparel & Textile Organisation)
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

AUSTRIA
Clothing Industry
Fachverband der Bekleidungsindustrie Österreichs
Address: Schwarzenbergplatz 4, 1037 Vienna, Austria
Phone: + 43 (0) 1 712 1296
Fax: + 43 (0) 1 713 9204
Internet: http://www.fashion-industry.at

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

BELGIUM
Clothing Industry
Belgian Clothing Association (FBIH)
Address: Rue Montoyer 24, B-1000 Brussels
Phone: + 32 (0) 2 238 1011
Fax: + 32 (0) 2 238 1010
Internet: http://www.belgianfashion.be

DENMARK
Clothing Industry
Federation of Danish Textiles and Clothing
Address: Birk Centerpark 38, Herning
Post 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

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

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

FRANCE
Clothing Industry
UFIH (Union Francaise des Industries de l'Habillement)
Address: 8, rue Montesquieu, 75001 Paris, France
Phone: + 33 (0) 1 4455 6660
Fax: + 33 (0) 1 4455 6666
Internet: http://www.la modefrancaise.tm.fr

Leather
Conseil National de Cuir
Address: 109, rue du Faubourg St. Honoré,
F-75008 Paris, France
Phone: + 33 (0) 1 4359 0569
Fax: + 33 (0) 1 4359 3002

GERMANY
Clothing Industry
Bundesverband Bekleidungsindustrie e.V.
Address: Mevissenstrasse 15,
D-50668 Cologne, Germany
Phone: + 49 (0) 221 774 4110
Fax: + 49 (0) 221 774 4118
Internet: http://www.bkleidungsindustrie.de

Wholesale
Gesamtverein des deutschen Textilgrosshandel
Address: Neumarkt 35-37, 50667 Cologne, Germany
Phone: + 49 221 217 092
Fax: + 49 221 212 898

Leather
Industry Verband der deutschen Lederindustrie e.V.
Address: Fuchstanzstrasse 61,
D-60489 Frankfurt am Main, Germany
Phone: + 49 (0) 69 97 843141
Fax: + 49 (0) 69 78 800009
Internet: http://www.vdl-web.de

GREECE
Clothing Industry
Hellenic Clothing Industry Association (HFIA)
Address: 51 Ermou Str, 10563 Athens, Greece
Phone: + 32 (0) 2 238 1011
Fax: + 32 (0) 2 230 4700
Internet: http://www.greekfashion.gr

IRELAND

Clothing Industry

Irish Clothing Manufacturers' Federation

Address: Confederation House, 84/86 Lower Bagget, Str Dublin 2, Ireland
Phone: + 353 (0) 1 605 1560
Fax: + 353 (0) 1 638 1560

ITALY

Clothing Industry

Sistema Moda Industria (SMI)

Address: Viale Sarca 223, I-20126 Milan, Italy
Phone: + 39 (0) 2 6610 3391
Fax: + 39 (0) 2 6610 3667
Internet: http://www.sistemamodaitalia.it

Wholesale

Associazone Italiana Rappresetanti Moda

Address: Via palestro 24, I-20121 Milan, Italy
Phone: + 39 (0) 2 77501
Fax: + 39 (0) 2 783 008

Leather

SVIP (Committee for Developing Leather Sales)

Address: Corso Italia 17, I-20122 Milan, Italy
Phone: + 39 (0) 2 8901 0020
Fax: + 39 (0) 2 8901 0345

THE NETHERLANDS

Clothing Industry

Modint

Address: P.O. Box 69265, 1060 CH Amsterdam, The Netherlands
Phone: + 31 (0) 20 512 1416
Fax: + 31 (0) 20 617 0634
E-mail: info@modint.nl
Internet: http://www.modint.nl

Wholesale

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

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

Clothing Industry

ANIVEC

Address: Av. Da Boavista 3525-7, Ap.1398, 4107 Porto Codex, Portugal
Phone: + 351 (0) 22 616 5470
Fax: + 351 (0) 22 610 0049
Internet: http://www.anivec.pt

SPAIN

Clothing Industry

Fedecon

Address: Princessa 25-6-1, 28008 Madrid, Spain
Phone: + 34 (0) 1 541 4094
Fax: + 34 (0) 1 542 3352

SWEDEN

Clothing Industry

TEKO industrierna

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

Wholesale

Textile Importers' Association

Address: SE-103 29 Stockholm, Sweden
Phone: + 46 (0) 8 762 7610
Fax: + 46 (0) 8 762 6887

UK

Clothing 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

Leather

British Leather Confederation

Address: Leather Trade House, Kings Park Road, Northampton NN3 6JD, UK
Phone: + 44 (0) 1604 494 131
Fax: + 44 (0) 1604 648 220

APPENDIX 4 TRADE FAIR ORGANISERS

FRANCE

Intersélection

International Fashion Exhibition

Location:	Paris-Nord/Villepinte
Segments:	Women's, men's and children's ready-to-wear and sportswear.
Frequency:	Twice a year (May: summer collection and
November:	winter collection)
Organization:	Eurovet
Address:	P.O. Box 121, 92113 Clichy Cédex, France
Phone:	+ 33 (0) 1 4756 3299
Fax:	+ 33 (0) 1 4756 3299
E-mail:	lmc@la-federation.com

Prêt-à-Porter

International Ladies' Ready-To-Wear Exhibition and Section Boutique

Location:	Paris Expo, Porte de Versailles
Segments:	The entire range of women's apparel including accessories
Frequency:	Twice a year (January and September) In spring presentation of the winter collection and in autumn of the summer collection.
Organization:	SODES
Address:	5, rue de Caumartin, 75009 Paris
Phone:	+ 33 (0) 1 44 947000
Fax:	+ 33 (0) 1 44 947005
E-mail:	info@comexpo-paris.com

SEHM

Salon International de l'Habillement Masculin
European Men's Wear Fair

Location:	Paris Expo, Porte de Versailles
Segments:	The entire range of men's and boys' apparel including accessories
Frequency:	Twice a year (January and July)
Organization:	Urban Show SA
Address:	Rue du Mail, 75002 Paris, France
Phone:	+ 33 (0) 1 40 137474
Fax:	+ 33 (0) 1 40 137484
E-mail:	cerat@whosnext.com
Internet:	nouveausehm.com

Le Cuir a Paris

International Leather Fair in Paris

Location:	Paris Expo, Porte de Versailles
Segments:	Tanning, components, chemical products, raw hides and skins and leather garments
Frequency:	Twice a year (April and September)
Organization:	Groupe SIC
Address:	109, rue du Faubourg, Saint-Honoré, 75373 Paris Cedex- 08, France
Phone:	+ 33 (0) 1 4359 0569
Fax:	+ 33 (0) 1 4359 3002
E-mail:	info@sicgroup.com
Internet:	http://www.sicgroup.com

GERMANY

CPD

Collections Premieren Düsseldorf

Location:	Messegelände +Fashion House, Düsseldorf
Sectors:	Fashion wear for men, women and children, including young fashion
Frequency:	Twice a year (February and August)
Organization:	Igedo GmbH
Address:	Stockumer Kirchstrasse 61, 40474 Düsseldorf, Germany
Phone:	+ 49 (0) 211 439601
Fax:	+ 49 (0) 211 4396345
E-mail:	info@igedo.com
Internet:	http://www.messe-duesseldorf.de

Herren-Mode-Woche

International Menswear Fair Cologne

Location:	Messegelände, Köln (Cologne)
Segments:	Casual and leisure wear, sportswear, accessories etc. for men including leatherwear
Frequency:	Twice a year (April and October)
Organization:	KölnMesse GmbH
Address:	P.O. Box 210760, D 50532 Köln, Germany
Phone:	+ 49 (0) 221 8210
Fax:	+ 49 (0) 221 8212 574
E-mail:	info@koelnmesse.de

Inter-Jeans

International Casualwear and Young Fashion
In combination with Herren-Mode-Woche

Segments:	Jeanswear, sportswear, club and streetwear, young fashion and children's wear
Organization:	See Herren-Mode-Woche

Fur & Fashion Frankfurt
Frankfurt International Outerwear Fair and Trade Fair for Fur, Leather and Textile
Location: Messegelände Frankfurt
Segments: Outdoor fashion in fur, leather and material-mix
Frequency: Annual (March)
Organization: Fur & Fashion Frankfurt Messe GmbH
Address: Niddastrasse 66-68, 60329 Frankfurt am Main, Germany
Phone: + 49 (0) 69 2426 350
Fax: + 49 (0) 69 23 67 16
E-mail: info@fur-fashion-frankfurt.de

International Modeforum Offenbach
Season News Bag Fashion and Leather Accessories
Location: Messegelände Offenbach
Segments: Leather goods, accessories and leatherwear
Frequency: Twice a year (March/April and September/October)
Organization: Messe Offenbach GmbH
Address: P.O. Box 101423, 63065 Offenbach, Germany
Phone: + 49 (0) 69 8297 550
Fax: + 49 (0) 69 8297 5560
E-mail: info@messe-offenbach.de

ITALY
Pitti Immagini Uomo
Location: Fortezza de Basso-Palazzo Affari, Firenze:
Segments: The entire range of men's apparel including accessories
Frequency: Twice a year (January and June)
Organization: Pitti Imagine srl
Address: Via Faenza 111, 50123 Firenze/Florence, Italy
Phone: + 39 (0) 55 3693401
Fax: + 39 (0) 55 3693200
E-mail: pittimmagine@softeam.it

Momi-Modamilano
International Presentation of Women's Wear Collections
Location: Fiera Milano
Segments: The entire range of women's fashion wear including accessories
Frequency: Twice a year (February and September/October)
Organization: Efima
Address: Viale sacra 223, 20126 Milan, Italy
Phone: + 39 (0) 2 66103555
Fax: + 39 (0) 2 66101638
E-mail: ente@expocts.it

Mifur
International Fur and Leather Exhibition
Location: Fiera Milano
Segments: Accessories and patterns, skins dressing and dyeing, fur garments and leatherwear
Frequency: Annual (March)
Organization: Ente Fieristico Mifur
Address: Corso venezia 51, 20121 Milan, Italy
Phone: + 39 (0) 2 7600 3315
Fax: + 39 (0) 2 7602 2024
E-mail: mifur@wms.it

Lineapelle
Italian Leather Fashion Preselection
Location: Bologna Fiera
Segments: Leather for footwear, leather goods, leatherwear and furnishings
Frequency: Twice a year (May and October/November)
Organization: Lineapelle S.p.A.
Address: Via Brisa 3, 20123 Milan, Italy
Phone: + 39 (0) 2 8807 711
Fax: + 39 (0) 2 8600 32
E-mail: lineapelle@unic.it

DENMARK
CIFF
Copenhagen International Fashion Fair
Segments: Ladies', men's and children's wear, young fashion and accessories
Frequency: Twice a year (February and August)
Location: Bella Center
Organisation: Federation of Danish Textile and Clothing
Address: P.O. Box 507, 7400 Herning, Denmark
Phone: + 45 (0) 99277200
Fax: + 45 (0) 97123350
E-mail: info@textile.dk
Internet: http://www.ciff.dk

UK
Menswear London
Location: ExCel London
Segments: Men's wear- classic, business, lifestyle, leisure, contemporary
Frequency: Twice a year (February and August)
Organisation: EMAP Fashion
Address: Angel House 338-346 Goswel Rd, Islington London EC1V 7QP
Phone: + 44 (0) 20 75201500
Fax: + 44 (0) 20 75201501
E-mail: ie@fashion.emap.co.uk

Premier Womenswear and Pure London Fashion Trade Exhibition

Location: Olympia, London
Segments: All kinds of women's outerwear and fashion accessories
Frequency: Twice a year (February and August)
Organisation: See Menswear London

40 Degrees

Location: Earls Court, London
Segments: Sports fashion, clubwear, jeanswear and directional casualwear
Frequency: Twice a year (February and August), with Menswear London
Organisation: See Menswear London

SPAIN

Iberpiel/Peletria

Fur and Leather Fashion Fair

Segments: Fur fashion, tanned fur skins, suede and nappa, machinery, labelling packing etc.
Frequency: Yearly (January/February) within Semana Int. de la Moda
Location: Parque Ferial Juan Carlos I
Organisation: IFEMA
Address: Casilla 67067, 28080 Madrid, Spain
Phone: + 34 (0) 91 7225352
Fax: + 34 (0) 91 7225801
E-mail: infoifema@ifema.es
Internet: http://www.ifema.es

Imagenmoda

International Women's Fashion Fair

Segments: Ladies fashion, sportswear and fashion accessories etc.
Frequency: Twice a year (February and August/September) within Semana Int. de la Moda
Location: Parque Ferial Juan Carlos I
Organisation: IFEMA
Address: Casilla 67067, 28080 Madrid, Spain
Phone: + 34 (0) 91 7225352
Fax: + 34 (0) 91 7225801
E-mail: infoifema@ifema.es
Internet: http://www.ifema.es

Pielespana

International Leather Fashion Fair

Segments: Apparel and accessories in suede, nappa and double face, tanning machines and chemicals
Frequency: Yearly (January)
Location: Fira de Barcelona
Organisation: Fira de Barcelona
Address: Av. Reina Ma. Cristina s/n, 08015 Barcelona, Spain
Phone: + 34 (0) 93 2332000
Fax: + 34 (0) 93 2332001
E-mail: info@firabcn.es
Internet: http://www.firabcn.es

Moda Barcelona

Four trade fairs including men's fashion (Barcelona Estilo Hombre), women's fashion (Barcelona Estilo Mujer), Young Designers and body fashion (Espacio Intimoda)

Frequency: Twice a year (February and July)
Location: Fira de Barcelona
Organisation: Moda Barcelona
Address: Calle Escoles Pies, 6, piso 1, 2a, 08017 Barcelona, Spain
Phone: + 34 (0) 93 209 3639
Fax: + 34 (0) 93 202 1378
E-mail: moda@moda-barcelona.com
Internet: http://www.firabcn.es

APPENDIX 5 TRADE PRESS

International fashion magazines for leather garments or leather goods including apparel

Ars Arpel
Publisher: Ars Arpel group s.r.l.
Address: Via Nievo, 33 20145 Milan, Italy
Phone: + 39 (0) 2 31 59 51
Fax: + 39 (0) 2 33 611 619
E-mail: arsapel@arsapel.it
Frequency: quarterly
Language: text in 5 languages, including English
Content: over 400 full colour pages with selected models of bags, suitcases, leatherwear etc.

Vogue Pelle
Publisher: Ed. Condé Nast s.p.a.
Address: Piazza Castello 27, 20121 Milan, Italy
Phone: + 39 (0) 2 85 611
Fax: + 39 (0) 2 7201 0090
Frequency: quarterly
Language: Italian
Content: Fashion information on leather garments and accessories

Mode Cuir
Publisher: Editions Infocuir
Address: 14, rue de la Folie Regnault, 75011 Paris, France
Phone: + 33 (0) 1 4024 1022
Fax: + 33 (0) 1 4024 0484
Frequency: quarterly
Language: French
Content: trends in leather fashion, of which partly leather garments

International fashion magazines for design, styling and forecasting department*s*

Prêt-à-Porter Collections (women's wear)
Men's Collections (men's wear)
Publisher: GAP Japan Co. Ltd
Address: 3-9-12 Higashi, Shibuya-ku, Tokyo, Japan
Phone: +81 (0) 3 5778-7170 (distributor)
Fax: +81 (0) 3 5766-6401
Frequency: twice a year (spring/summer and autumn/winter)
Language: English
Content: overview of world's leading fashion designers shows

Donna Collezioni
Publisher: Zanfi Editori srl
Address: Via Emilia Ovest, 954, P.O. Box 70, 41100 Modena CPO Italy
Phone: + 39 (0) 59 891700
Fax: + 39 (0) 59 891701
Frequency: 4 times a year
Content: women's wear fashion
Language: Italian with English summary
E-mail: zanfi.editori@mo.nettuno.it
From the same publisher: Uoma Collezioni and Sport & Street Collezioni.

International Textiles
Publisher: ITBD
Address: 23 Bloomsbury Square, London WC1A2PJ, United Kingdom
Phone: + 44 (0) 20 7637 2211
Fax: + 44 (0) 20 7637 2248
Frequency: 10 issues a year
Language: English
E-mail: itbd@itbd.co.uk
Internet: http://www.itbd.co.uk
Content: Information about colours, fabrics, styling, haute couture etc.

Textile View Magazine
Publisher: Metropolitan Publishing
Address: P.O. Box 53261, 1007 RG Amsterdam, The Netherlands
Phone: + 31 (0) 20 6177 624
Fax: + 31 (0) 20 6179 357
Frequency: quarterly
Language: English
E-mail: office@view-publications.com
Internet: http://www.view-publications.com
Content: Developments in fashion and technology for yarns, fabrics etc.

Sportswear International
Publisher: Deutscher Fachverlag GmbH
Address: Mainzer Landstrasse 251, D-60326 Frankfurt am Main,Germany
Phone: + 49 (0) 69 7595 1987
Fax: + 49 (0) 69 7595 12200
Frequency: 6 times a year
Language: English
Content: International fashion trends in jeanswear, leisurewear, accessories etc.

International magazines with information about production and trade in leather

IDC (Industrie du Cuir)
Publisher: Editions Infocuir
Address: 14, rue de la Folie Regnault,
75011 Paris, France
Phone: + 33 (0) 1 4024 1022
Fax: + 33 (0) 1 4024 0484
Frequency: monthly
Language: French and English
Content: European leather magazine with info about leather industry, tanneries, fairs, production etc.

World Leather
Publisher: World Leather,
Address: 36 Crosby Road North, P.O. Box 6,
Liverpool, L22QN, United Kingdom
Phone: + 44 (0) 151 928 9288
Fax: + 44 (0) 151 928 4190
Internet: http://www.worldleather.co.uk
Frequency: monthly
Language: English
Content: Global magazine for the leather processing, product manufacturing and trading industries

International magazines with information about production and trade in textiles and clothing

Textile Outlook International
Publisher: Textiles Intelligence Limited
Address: Derwent House, 31 Alma Lane Winslow
Cheshire SK9 5EY, United Kingdom
Phone: + 44 (0) 1625 536136 (distribution)
Fax: + 44 (0) 1625 536137
Frequency: 6 issues a year
Language: English
E-mail: textintell@aol.com
Content: Business and market analyses for the textile and clothing industry

Knitting International
Publisher: World Textile Publications Ltd
Address: Perkin House, 1 Longlands Street Bradford,
West Yorkshire BD1 2TP United Kingdom
Phone: + 44 (0) 1274 378800
Fax: + 44 (0) 1274 378811
Frequency: 11 issues a year
Language: English
Content: Information about production technologies and fashion (trends, fairs etc) information concerning knitwear

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

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

Textilia
Publisher: VNU Business Publications
Address: P.O. Box 1915,
2003 BA Haarlem, The Netherlands
Phone: + 31 (0) 23 5463973
Fax: + 31 (0) 23 5465536
E-mail: textilia@bp.vnu.com
Internet: http://www.textilia.nl
Frequency: weekly
Language: Dutch
Content: Trade magazine for clothing and textiles

Texpress
Publisher: VNU Business Publications
Address: P.O. Box 1915,
2003 BA Haarlem, The Netherlands
Phone: + 31 (0) 23 5463225
Fax: + 31 (0) 23 5465539
E-mail: texpress@bp.vnu.com
Frequency: weekly
Language: Dutch
Content: magazine for textiles industry and trade in Belgium and The Netherlands

APPENDIX 6 BUSINESS SUPPORT ORGANISATIONS

Organisations, which are active in the field of the promotion of imports from developing countries, like CBI in The Netherlands.

ITC (International Trade Center)
Division of Product and Market Development
Address: 54-56, rue de Montbrillant, P.O. Box 10, 1211 Geneva 10, Switzerland
Phone: + 41 (0) 22 7300 111
Fax: + 41 (0) 22 733 4439
E-mail: itcreg@intracen.org
Internet: http://www.intracen.org

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

GTZ (Deutsche Gesellschaft fur Technische Zusammenarbeit GmbH)
German organisation for technical cooperation
Address: Dag-Hammerskjöld-Weg 1-5; P.O. Box 5180, D-65726 Eschborn 1, Germany
Phone: + 49 (0) 6196 79-0
Fax: + 49 (0) 6196 79-1115
Internet: http://www.gtz.de

ICE (Instituto Nazionale per il Commercio Estero)
National Institute for Foreign Trade
Address: Via Liszt 21, P.O. Box 10057, 00144 Rome, Italy
Phone: + 39 (0) 6 5992 9294
Fax: + 39 (0) 6 5421 8242
Internet: http://www.ice.it

Bundeskammer der gewerblichen Wirtschaft
Austrian Federal Economic Chamber
Address: Wiener Hauptstrasse 63, P.O. Box 150, 1045 Vienna, Austria
Phone: + 43 (0) 1 5010 4062
Fax: + 43 (0) 1 5010 5254
Internet: http://www.wk.or.at

Norimpod (Norwegian Import Promotion Office for Products from Developing Countries)
Address: Rureløkveien 26, P.O. Box 8034 Dep., N-0030 Oslo 1, Norway
Phone: + 47 (0) 22 242030
Fax: + 47 (0) 22 242031
Internet: http://www.norad.no

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

DFID (Department for International Development)
Address: 1, Palace Street London SW1E 5HE, UK
Phone: + 44 (0) 20 7023 0000
Fax: + 44 (0) 20 7023 0019
Internet : http://www.dfid.gov.uk

SIPPO, Swiss Import Promotion Programme
Address: P.O. Box 492, CH-8035 Zurich, Switzerland
Phone: + 41 (0) 1 365 5200
Fax: + 41 (0) 1 365 5202
E-mail: info@sippo.ch
Internet: http://www.sippo.ch

APPENDIX 7 OTHER USEFUL ADDRESSES

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

Chamber of Commerce & Industries for Rotterdam and the Lower-Meuse
Address: Beursplein 37 (3rd Floor), 3011 AA Rotterdam, The Netherlands
Post address: P.O. Box 30025, 3001 DA Rotterdam, The Netherlands
Phone: + 31 (0) 10 405 7777
Fax: + 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
Post address: P.O. Box 2852, 1000 CW Amsterdam, The Netherlands
Phone: + 31 (0) 20 531 4000
Fax: + 31 (0) 20 531 4799
E-mail: post@amsterdam.kvk.nl
Internet: http://www.amsterdam.kvk.nl

Import duties
Netherlands Customs Directorate
Address: Laan op Zuid 45, 3072 DB Rotterdam, The Netherlands
Post address: P.O. Box 50964, 3007 BG Rotterdam, The Netherlands
Phone: + 31 (0) 10 290 4949
Fax: + 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
Post address: P.O. Box 20201, 2500 EE The Hague, The Netherlands
Phone: + 31 (0) 70 342 7540
Fax: + 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
Phone: + 31 (0) 50 523 9111
Fax: + 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
Post address: P.O. Box 20105, 2500 EC The Hague, The Netherlands
Phone: + 31 (0) 70 379 8933
Fax: + 31 (0) 70 379 7878
E-mail: infoservice@evd.nl
Internet: http://www.hollandtrade.com

Indication of tenders, CE-marking, European rules for working and environmental circumstances:

EU Trade Information
Address: Pettelaarpark 10, 5216 PD 's-Hertogenbosch
Post address: P.O. Box 70060, 5201 DZ 's-Hertogenbosch, The Netherlands
Phone: + 31 (0) 73 680 6600
Fax: + 31 (0) 73 612 3210
E-mail: info@egadvies.nl
Internet: http://www.egadvies.nl

Labour circumstances:
ILO (International Labour Organisation)
Address: 4, Route des Morillons, CH-1211 Geneva 22, Switzerland
Phone: + 41 (0) 22 79 9611
Fax: + 41 (0) 22 798 8685
Internet: www.ilo.org

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

Kompass
Address: Hoge Hilweg 15, 1101 CB Amsterdam, The Netherlands
Phone: + 31 (0) 20 697 4041
Fax: + 31 (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
Phone: + 31 (0) 23 531 9031
Fax: + 31 (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
Phone: + 33 (0) 1 4116 4900
Fax: + 33 (0) 1 4116 4950
E-mail: comments@europages.com
Internet: http://www.europages.com

Important addresses for environmental issues
Information concerning environmental aspects is provided by business support organisations like CBI, GTZ, Norimpod and SIDA (for addresses see Appendix 7).

General information:
AccessGuide
CBI's database on European non-tariff trade barriers
Address: P.O. Box 30009,
3001 DA Rotterdam, The Netherlands
Phone: + 31 (0) 10 2013434
Fax: + 31 (0) 10 4114081
E-mail: accessguide@cbi.nl
Internet: http://www.cbi.nl/accessguide

Contact point EU ECO-label:
Commission of the European Communities, DG XI-A-2
Address: Rue de la Loi 200, B-1049 Brussels, Belgium
Phone: + 32 (0) 2 2969515
Fax: + 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
Phone: + 31 (0) 70 3586300
Fax: + 31 (0) 70 3502517
E-mail: ecomarkt@ecomarkt.nl
Internet: http://www.milieukeur.nl

Contact points for the Öko-Tex hallmark:
Zertifizierungsstelle
Address: Frankfurter Straße 10-14,
D-65760 Eschborn, Germany
Phone: + 49 (0) 6196 966230
Fax: + 49 (0) 6196 966226

Forschungsinstitut Hohenstein
Address: Schloß Hohenstein,
D-74357 Bonningheim, Germany
Phone: + 49 (0) 7143 2710
Fax: + 49 (0) 7143 2751
E-mail: info@hohenstein.de
Internet: http://www.hohenstein.de

Contact points for the SG (Schadstoffgeprüft Zeichen) hallmark:
TÜV Rheinland Sicherheit und Umweltschutz GmbH
Address: Am Grauen Stein,
D-51105 Cologne, Germany
Phone: + 49 (0) 221 8062958
Fax: + 49 (0) 221 8062882
Internet: http://www.tuev-rheinland.de

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

Prüf- und Forschungsinstitut Pirmasens
Address: Hans-Sachs-Straße 2,
D-66955 Pirmasens, Germany
Phone: + 49 (0) 6331 74016
Fax: + 49 (0) 6331 74507
Internet: http://www.pfi-ps.de

APPENDIX 8 STANDARD ORGANIZATIONS

IULTCS

International Union of Leather Technologists and Chemists Societies

Address: secretariat: 1213 Emma Lane, Warminster, PA 18974 USA
Phone: + 1 (0) 215 233 6486
E-mail: iultcs@voicenet.com
Internet: http://www.iultcs.org

ISO

International Standards Organization

Address: 1, Rue de Varembé, P.O. Box 56, CH 1211 Geneva-20, Switzerland
Phone: + 41 (0) 22 749 0111
Fax: + 49 (0) 22 733 3430
E-mail: central@iso.org
Internet: http://www.iso.org

CEN

European Committee for Standardization

Address: 36, rue de Stassart, B 1050 Brussels, Belgium
Phone: + 32 (0) 2 5500 0811
Fax: + 32 (0) 2 5500 0819
E-mail: infodesk@cenorm.be
Internet: http://www.cenorm.be

CITES

Convention on International Trade in Endangered Species of Wild Fauna and Flora

Address: P.O. Box 456, CH 1219 Châtelaine, Geneva, Switzerland
Phone: + 41 (0) 22 9799 139/40
Fax: + 41 (0) 22 7973 417
E-mail: cites@unep.ch
Internet: http://www.cites.org

APPENDIX 9 LIST OF DEVELOPING COUNTRIES

Please note that the OECD list of developing countries, as applied in this market survey, may include countries that are usually not 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 São
Jamaica
Jordan
Kazakstan
Kenya
Kiribati
Korea, Rep. of
Korea, South
Kyrghyz Rep.
Laos
Lebanon
Lesotho St.
Liberia
Libya St.
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
Tomé & Principe
Saudi Arabia
Senegal
Seychelles
Sierra Leone
Slovenia
Solomon Islands
Somalia
South Africa
Sri Lanka
St. Helena
Kitts-Nevis
St. Lucia
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 10 LIST OF MAJOR BUYERS OF LEATHER GARMENTS IN THE NETHERLANDS

1. Manufacturers/wholesalers/importers
2. Clothing multiple stores
3. Central buying organisations
4. Department stores
5. Textile discounters
6. Footwear/sports discounters
7. Mail order houses

1 MANUFACTURERS/WHOLESALERS/IMPORTERS

Arma Leder BV
Address: Stevinstraat 7-c,
1171 XW Badhoevedorp, The Netherlands
Mail address: P.O. Box 286,
1170 AG Badhoevedorp, The Netherlands
Phone: + 31 (0) 20 659 1111
Fax: + 31 (0) 20 659 9999
E-mail: armaleder@armaleder.nl
Internet: http://www.armaleder.nl

Donders BV
Address: Nieuwgraaf 298,
6921 RS Duiven, The Netherlands
Mail address: P.O. Box 225,
6920 AE Duiven, The Netherlands
Phone: + 31 (0) 26 311 6664
Fax: + 31 (0) 26 311 8699
E-mail: info@donders-fashion.nl
Internet: http://www.donders-fashion.nl

Emac BV
Address: Stationsplein 10a,
5121 EA Rijen, The Netherlands
Mail address: P.O. Box 123,
5120 AC Rijen, The Netherlands
Phone: + 31 (0) 161 224 655
Fax: + 31 (0) 161 226 667
E-mail: emac-fashion-in leather@wxs.nl

Interstar Modes BV
Address: Fashion House, Kon. Wilhelminaplein 8,
1062 HK Amsterdam, The Netherlands
Mail address: P.O. Box 9305,
1060 AH Amsterdam, The Netherlands
Phone: + 31 (0) 20 4089 899
Fax: + 31 (0) 20 6175 952
E-mail: info@ interstar.nl
Internet: http://www.interstar.nl

Leder International BV
Address: Vilgert 52, 5941 CT Velden, The Netherlands
Phone: + 31 (0) 77 4723 383
Fax: + 31 (0) 77 4721 981

Teeuwen BV
Address: Peperstraat 8,
5171 EC Kaatsheuvel, The Netherlands
Phone: + 31 (0) 416 273 166
Fax: + 31 (0) 416 281 638

2 CLOTHING MULTIPLE STORES

2.1 Multiples, ladies' fashion

Didi Fashion
Address: Celsiusstraat 2,
1704 RW Heerhugowaard, The Netherlands
Mail address: P.O. Box 134,
1700 AC Heerhugowaard, The Netherlands
Phone: + 31 (0) 72 5751 500
Fax: + 31 (0) 72 5751 420
E-mail: info@coltex.nl
Internet: http://www.didi.nl
Outlets: 96 (partly franchise)
Note: Didifashion is part of Coltex BV, Heerhugowaard

Firstlady
Address: Koninginneweg 1,
3871 JZ Hoevelaken, The Netherlands
Mail address: P.O. Box 150,
3870 CD Hoevelaken, The Netherlands
Phone: + 31 (0) 33 2532 767
Fax: + 31 (0) 33 2532 372
Internet: http://www.firtslady.nl
Outlets: 60
Note: Firstlady is part of buying and selling cooperation Intres BV, Hoevelaken

La Ligna
Address: Industrieweg 5,
9804 TH Nordhorn, The Netherlands
Mail address: P.O. Box 129,
9800 AC Zuidhorn, The Netherlands
Phone: + 31 (0) 594 504 906
Fax: + 31 (0) 594 505 206
E-mail: laligna@laligna.nl
Internet: http://www.laligna.nl
Outlets: 31

The Lady Sting
Address: Ellen Pankhurststraat 21,
5032 MD Tilburg, The Netherlands
Mail address: P.O. Box 910,
5000 AX Tilburg, The Netherlands
Phone: + 31 (0) 13 4659300
Fax: + 31 (0) 13 4659301
Outlets: 30
Note: The Lady Sting is part of Basilicum BV, Tilburg

Leon
Address: Spaarneweg 16f,
2142 EN Cruquius, The Netherlands
Phone: + 31 (0) 23 5283 603
Fax: + 31 (0) 23 5283 459
E-mail: info@leon-mode.nl
Outlets: 24

M&S Mode
Address: Basisweg 52,
1043 AP Amsterdam, The Netherlands
Mail address: P.O. Box 8402,
1005 AK Amsterdam, The Netherlands
Phone: + 31 (0) 20 5809 911
Fax: + 31 (0) 20 5809 304
Outlets: 130
Note: M&S Mode is part of Vendex/KBB NV, Amsterdam

Miss Etam
Address: Oostweg 2,
2723 RH Zoetermeer, The Netherlands
Mail address: P.O. Box 101,
2700 AC Zoetermeer, The Netherlands
Phone: + 31 (0) 79 797 2000
Fax: + 31 (0) 79 797 2196
E-mail: info@missetam.com
Internet: http://missetam.com
Outlets: 126
Note: Miss Etam is part of Etam Groep, Zoetermeer

Promiss
Address: Oostweg 2,
2723 RH Zoetermeer, The Netherlands
Mail address: P.O. Box 831,
2700 AV Zoetermeer, The Netherlands
Phone: + 31 (0) 79 797 2200
Fax: + 31 (0) 79 797 2206
E-mail: info@promiss.nl
Internet: http://promiss.nl
Outlets: 54
Note: Promiss is part of Etam Groep, Zoetermeer

Pulls
Address: Amsbergstraat 2,
7418 EZ Deventer, The Netherlands
Mail address: P.O. Box 847,
7400 AV Deventer, The Netherlands
Phone: + 31 (0) 570 636 727
Fax: + 31 (0) 570 630 708
E-mail: vanderwijk@pulls.nl
Internet: http://www.pulls.nl
Outlets: 35

SPS Superstar
Address: Celsiusstraat 2,
1704 RW Heerhugowaard, The Netherlands
Mail address: P.O. Box 134,
1700 AC Heerhugowaard, The Netherlands
Phone: + 31 (0) 72 5751 500
Fax: + 31 (0) 72 5751 420
E-mail: info@coltex.nl
Internet: http://www.sps-superstar.nl
Outlets: 54
Note: SPS Superstar is part of Coltex BV, Heerhugowaard

We Women (Zij)
Address: Reaktorweg 101,
3542 AD Utrecht, The Netherlands
Mail address: P.O. Box 30200,
3503 AD Utrecht, The Netherlands
Phone: + 31 (0) 30 2479 212
Fax: + 31 (0) 30 241 1505
Internet: http://www.we.nl
Outlets: 44

Witteveen
Address: Meidoornkade 24,
3992 AE Houten, The Netherlands
Mail address: P.O. Box 115,
3990 DC Houten, The Netherlands
Phone: + 31 (0) 30 6349400
Fax: + 31 (0) 30 6349401
E-mail: info@witteveen-mode.com
Internet: http://www.witteveen.nl
Outlets: 64
Note: Wittteveen is part of buying and selling cooperation Euretco Fashion.

2.2 Men's fashion stores

Adam Herenmode
Address: Meidoornkade 22,
3992 AE Houten, The Netherlands
Mail address: P.O. Box 115,
3990 DC Houten, The Netherlands
Phone: + 31 (0) 30 6349 440
Fax: + 31 (0) 30 6349 441
E-mail: adam@euretco.net
Internet: http://www. adam.nl
Outlets: 40
Note: Adams Herenmode is part of buying and selling cooperation Euretco Fashion.

New Bondstreet
Address: Koninginneweg 1,
3871 JZ Hoevelaken, The Netherlands
Mail address: P.O. Box 150,
3870 CD Hoevelaken, The Netherlands
Phone: + 31 (0) 33 2532 787
Fax: + 31 (0) 33 2532 372
Internet: http://www.intres.nl
Outlets: 72
Note: New Bondstreet is just like the men's fashion chains First Man (17 outlets) and Lord Hamilton (30 outlets) part of buying and selling cooperation Intres BV, Hoevelaken

Setpoint
Address: Buskendries 5,
6673 DA Andelst, The Netherlands
Phone: + 31 (0) 448 471 411
Fax: + 31 (0) 448 471 412
E-mail: setpoint@setpoint.nl
Internet: http://www.setpoint.nl
Outlets: 25

Texton
Address: Koehorstmaat 11,
7561 BM Deurningen, The Netherlands
Phone: + 31 (0) 74 2777 555
Fax: + 31 (0) 74 2777 539
Outlets: 30

We Men
Address: Reaktorweg 101,
3542 AD Utrecht, The Netherlands
Mail address: P.O. Box 30200,
3503 AD Utrecht, The Netherlands
Phone: + 31 (0) 30 2479 211
Fax: + 31 (0) 30 2411 506
Internet: http://www.we.nl
Outlets: 96

2.3 Men's and women's fashion stores

Shoeby Fashion
Address: Middelweg 34,
5253 CA Nieuwkuijk, The Netherlands
Phone: + 31 (0) 73 5118 019
Fax: + 31 (0) 73 5113 078
E-mail: info@shoeby-shops.nl
Internet: http://www.shoebyfranchise.nl
Outlets: 66

The Sting
Address: Ellen Pankhurststraat 21,
5032 MD Tilburg, The Netherlands
Mail address: P.O. Box 910,
5000 AX Tilburg, The Netherlands
Phone: + 31 (0) 13 4659300
Fax: + 31 (0) 13 4659301
Outlets: 20
Note: The Sting is part of Basilicum BV, Tilburg

2.4 Family (men, women and children) fashion stores

C & A Nederland
The European buying departments are located in Belgium and Germany
Buying office: men's wear, children and babies' wear
Address: Senneberg Jean Monnetlaan,
1804 Vilvorde, Belgium
Phone: + 32 2 2576960
Fax: + 32 2 2576611
E-mail: info@c-and-a.be
Internet: http://www.c-and-a.com

Buying office: women's wear
Address: Hans-Günther-Sohl Strasse 8,
40235 Düsseldorf, Germany
Phone: + 49 211 6930
Fax: + 49 211 6931 060
E-mail: info@CundA.de
Internet: http://www.c-and-a.com

Duthler
Address: Huygensweg 28,
5482 TG Schijndel, The Netherlands
Mail address: P.O. Box 199,
5480 AD Schijndel, The Netherlands
Phone: + 31 (0) 73 5431 431
Fax: + 31 (0) 73 5431 400
Outlets: 25

Jola Mode
Address: Oude Kerkstraat 40,
4921 HH Made, The Netherlands
Mail address: P.O. Box 175,
4920 AD Made, The Netherlands
Phone: + 31 (0) 162 685 889
Fax: + 31 (0) 162 686 685
E-mail: marja.textile@planet.nl
Outlets: 41

Landgraaf
Address: Polderweg O 1,
2973 AN Molenaarsgraaf, The Netherlands
Phone: + 31 (0) 184 641 265
Fax: + 31 (0) 184 642 004
Outlets: 97

Marca Mode
Address: Randstad 22-137,
1316 BW Almere, The Netherlands
Mail address: P.O. Box 1269,
1300 BG Almere, The Netherlands
Phone: + 31 (0) 36 5481 081
Fax: + 31 (0) 36 5481 090
Internet: http://www.marca.nl
Outlets: 33

Superconfex
Address: Mauritsweg 134,
6171 AK Stein, The Netherlands
Mail address: P.O. Box 66, 6170 AB Stein, The Netherlands
Phone: + 31 (0) 46 4359435
Fax: + 31 (0) 46 4331951
Internet: http://www.superconfex.com
Outlets: 7

2.5 Leisure chains

Van Bree Jeans & Casuals
Address: De Vest 24,
5555 XL Valkenswaard, The Netherlands
Mail address: P.O. Box 493,
5550 AL Valkenswaard, The Netherlands
Phone: + 31 (0) 40 2072 020
Fax: + 31 (0) 40 2072 021
Outlets: 24

Cool Cat
Address: Hoofdveste 10,
3992 DG Houten, The Netherlands
Mail address: P.O. Box 125,
3000 DC Houten, The Netherlands
Phone: + 31 (0) 30 6356 300
Fax: + 31 (0) 30 6355 500
E-mail: info@coolcat.nl
Outlets: 58
At the same address: Wonder Woman with 15 outlets

Crums
Address: Meeuwensingel 101,
2903 TE Capelle ad IJssel, The Netherlands
Mail address: P.O. Box 65,
2900 AB Capelle a/d IJssel, The Netherlands
Phone: + 31 (0) 10 2845 678
Fax: + 31 (0) 10 450 1881
E-mail: bitouk@costerbv.nl
Outlets: 22

Fetter Fashion Retail Group
Address: Versterkerstraat 12,
1322 AP, Almere, The Netherlands
Mail address: P.O. Box 1288,
1300 BG Almere, The Netherlands
Phone: + 31 (0) 36 5460 600
Fax: + 31 (0) 36 5358 030
E-mail: info@fetterfashion.nl
Internet: http://www. canadianstocks.nl and
http://www.fooks.nl
Outlets: 91
This group covers the chains: Boebie Blue (10 outlets), Canadian Stocks (31) and Fooks (50)

Jeans Centre
Address: Vimmerik 12,
5253 CB Nieuwkuijk, The Netherlands
Phone: + 31 (0) 73 5130 155
Fax: + 31 (0) 73 5130 140
E-mail: info@jeanscentre.nl
Internet: http://www.euretco.com
Outlets: 81

Open32
Address: Delta 132,
6825 MV Arnhem, The Netherlands
Phone: + 31 (0) 26 3633 232
Fax: + 31 (0) 26 3633 200
Outlets: 50

Score
Address: Centerpoort-Noord, Marketing 35,
6921 RE Duiven, The Netherlands
Phone: + 31 (0) 26 3193 450
Fax: + 31 (0) 26 3121 088
E-mail: info@score.nl
Internet: http://www.score.nl
Outlets: 25

Snuffel
Address: Legolaan 1,
9861 AT Grootegast, The Netherlands
Phone: + 31 (0) 594 283 888
Fax: + 31 (0) 594 621 911
Outlets: 61

Steps
Address: Sterrenbergweg 44,
3769 BT Soesterberg, The Netherlands
Mail address: P.O. Box 1,
3769 ZG Soesterberg, The Netherlands
Phone: + 31 (0) 346 356811
Fax: + 31 (0) 346 352265
E-mail: stepsinfo@steps.nl
Internet: http://www.steps.nl
Outlets: 123

Vet Jeans Store
Address: Celsiusstraat 2,
1704 RW Heerhugowaard, The Netherlands
Mail address: P.O. Box 134,
1700 AC Heerhugowaard, The Netherlands
Phone: + 31 (0) 72 5751 500
Fax: + 31 (0) 72 5751 420
E-mail: info@coltex.nl
Internet: http://www.vet.nl
Outlets: 50
Note: *Vet is part of Coltex BV, Heerhugowaard*

2.6 Leather speciality stores

Sluis Leder
Address: Vleesstraat 54,
5911 JG Venlo, The Netherlands
Phone: + 31 (0) 77 3513 136
Fax: + 31 (0) 77 3513 136
Outlets: 9

Leershop Zablee
Address: Stationsstraat 38,
5141 GE Waalwijk, The Netherlands
Mail address: P.O. Box 290,
5140 AG Waalwijk, The Netherlands
Phone: + 31 (0) 416 338 906
Fax: + 31 (0) 416 330 825
E-mail: zablee@tref.nl
Internet: http://www.zablee.nl
Outlets: 3

3 CENTRAL BUYING ORGANISATIONS

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: Meidoornkade 22,
3992 AE Houten, The Netherlands
Mail address: P.O. Box 115,
3990 DC Houten, The Netherlands
Phone: + 31 (0) 30 6349 200
Fax: + 31 (0) 30 6349 201
E-mail: info@euretco.net
Internet: http://www.euretco.nl.

Centurion BA
Address: Schouwstraat 4,
1435 KN Rijssenhout, The Netherlands
Mail address: P.O. Box 254,
1430 AG Aalsmeer, The Netherlands
Phone: + 31 (0) 297 326 655
Fax: + 31 (0) 297 343 400

Deco BA
Address: Energieweg 7,
3401 MD IJsselstein, The Netherlands
Mail address: P.O. Box 80,
3400 AB IJsselstein, The Netherlands
Phone: + 31 (0) 30 6860 900
Fax: + 31 (0) 30 6884 270

Hadac
Mail address: P.O. Box 69098,
1060 CB Amsterdam, The Netherlands
Phone: + 31 (0) 20 6153 374
Fax: + 31 (0) 20 6157 245

4 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 3129 700
Fax: + 31 (0) 20 6973 926
Internet: http://www.bijenkorf.nl
Outlets : 10

Hema
Address: Frankemaheerd 2,
Amsterdam-ZO, The Netherlands
Mail address: P.O. Box 23220,
1100 DS Amsterdam, The Netherlands
Phone: + 31 (0) 20 3114 411
Fax: + 31 (0) 20 3114 000
Internet: http://www.hema.nl
Outlets : 254

Makro
Address: Dalsteindreef 101-139,
1112 XC Diemen, The Netherlands
Mail address: P.O. Box 22579,
1100 DB Amsterdam ZO, The Netherlands
Phone: + 31 (0) 20 3980 200
Fax: + 31 (0) 20 3980 201
Internet: http://www.makro.nl
Outlets : 7

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 5959 111
Fax: + 31 (0) 20 6926 150
Internet: http://www.vroomendreesmann.nl
Outlets : 70

5 TEXTILE SUPERMARKETS/DISCOUNTERS

Bentex
Address: Kadijk 2, 8531 XD Lemmer, The Netherlands
Mail address: P.O. Box 23,
8530 AA Lemmer, The Netherlands
Phone: + 31 (0) 514 568 956
Fax: + 31 (0) 514 568 966
Internet: http://www.macintosh.nl/bentex
Outlets : 50

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) 180 442 020
Fax: + 31 (0) 180 442 029
Outlets : 140

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) 528 272 022
Fax: + 31 (0) 528 273 548
E-mail: info@htenhoor.nl
Internet: http://www.henktenhoor.nl
Outlets : 55

Wibra
Address: Hammerstraat 9,
8161 PH Epe, The Netherlands
Mail address: P.O. Box 192, 8160 AD Epe, The Netherlands
Phone: + 31 (0) 578 676 333
Fax: + 31 (0) 578 615 070
Outlets : 188

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
Outlets : 380

6 FOOTWEAR/SPORTS DISCOUNTERS

Bristol BV
Address: Weerenweg 15-17,
1161 AE Zwanenburg, The Netherlands
Mail address: P.O. Box 173,
1160 AD Zwanenburg, The Netherlands
Phone: + 31 (0) 20 497 6353
Fax: + 31 (0) 20 497 3643
E-mail: info@bristol-nederland.nl
Internet: http://www.bristolonline.nl
Outlets : 88

Scapino
Address: Industrieweg 28,
9403 AB Assen, The Netherlands
Mail address: P.O. Box 250,
9400 AG Assen, The Netherlands
Phone: + 31 (0) 592 340 042
Fax: + 31 (0) 592 344 904
Internet: http://www.scapino.nl
Outlets : 200

Schoenenreus
Address: Belgenlaan 1,
5406 XN Uden, The Netherlands
Mail address: P.O. Box 72, 5400 AB Uden, The Netherlands
Phone: + 31 (0) 413 336 699
Fax: + 31 (0) 413 336 600
Outlets : 172

7 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

APPENDIX 11 LIST OF DISTRIBUTORS IN OTHER EU COUNTRIES

EUROPE

C&A

Buying office: men's wear, children's and babies' wear
Address: Senneberg Jean Monnetlaan,
1804 Vilvorde, Belgium
Phone: + 32 2 2576960
Fax: + 32 2 2576611
E-mail: info@c-and-a.be
Internet: http://www.c-and-a.com

C&A

Buying office: women's wear
Address: Hans-Günther-Sohl Strasse 8,
40235 Düsseldorf, Germany
Phone: + 49 211 6930
Fax: + 49 211 6931 060
E-mail: info@CundA.de
Internet: http://www.c-and-a.com

Hennes & Mauritz

Address: Norrlandsgatan 15, Stockholm, Sweden
Mail address: P.O. Box 1421, 11184 Stockholm, Sweden
Phone: + 46 (0) 87965500
Fax: + 46 (0) 8209919
Internet: http://www.hm.com

GERMANY

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

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

Tchibo

Buying office: Tschibo Frisch-Röst-Kaffee GmbH
Address: Uberseering 18, 22297 Hamburg, Germany
Phone: + 49 (0) 40 63870
Fax: + 49 (0) 40 63872 600
Internet: http://www.tchibo.de

Douglas Holding AG

Daughter companies: Appelrath-Cüpper, Biba Mode, Sport Küper, Pohland, Sport Voswinkel etc.
Address: Kabeler Strasse 4, 58099 Hagen, Germany
Phone: + 49 (0) 2 331 690 0
Fax: + 49 (0) 2 331 690 678
Internet: http://www.douglas-holding.de

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

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

Etam Développement
Address: 69-73 boulevard Victor Hugo, 93400 Saint Ouen, France
Phone: + 33 (0) 1 4948 7070
Fax: + 33 (0) 1 4948 7001
Internet: http://www. etam.fr

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
Daughters: 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

Burton Menswear
Arcadia Group
Address: Colegrave House, 70 Berners Street, London W1P 3AE, United Kingdom
Phone: + 44 (0) 207 636 8040
Fax: + 44 (0) 207 927 1715
Internet: http://www.burtonmenswear.co.uk

Top Man/Top Shop
Arcadia Group
Address: Colegrave House, 70 Berners Street, London W1P 3AE, United Kingdom
Phone: + 44 (0) 207 636 8040
Fax: + 44 (0) 207 927 1715
Internet: http://www.tos.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 12 USEFUL WEB SITES

Besides the about 130 websites, mentioned in this survey, the following sites may be useful:

http://www.euroleather.com
The official site of the European leather industry, created by Cotance (Confederation of National Associations of Tanners and Dressers of the European Community). The main purpose of this organisation is to promote the interests of the European tanning industry at international level.
Information is given about leather production in Europe (including statistics), R&D institutes etc.

http://www.blcleathertech.com
BLC is an independent British leather technology centre, which publishes information on the European project FAIR (factors affecting hide and skin quality) and gives information about health and safety, testing etc.

http://www.leatherbizz.com
This website gives a product database, to get in touch with leather suppliers; international news about leather, organised by region; reference point, including ‘World Leather’ magazine reference material; and an event calendar.
This site is free during 60 days, after that a fee is charged.

http://www.leatherexchange.com
The target group for this website is primarily motorcyclists but gives detailed information about leather clothing items in this field.

http://www.leathernet.com
This USA-based site is designed for the leather industry world-wide and includes a leather directory, news, market reports, including market prices of leather and a free trading board.

http://www.redwood.uk.com
Mike Redwood publishes (supported by www.leatherbizz.com) his leather marketing and processing guide. Downloading of documents like: ‘E-commerce and leather marketing’ and ‘Applying the tools of marketing to a growing business’ is possible. Other information about manufacturing, trade associations, glossary, places for tanning, materials etc.

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;
- Quick scans on environmental, social and health issues;
- Manuals on subjects such as technical and environmental regulations, 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 GreenBuss database on European trade-related environmental policy and technology;
- CBI' s Trade Documentation Centre offering supply-related information to importers, such as exporters' directories, country and sector information, periodicals from developing countries, and - to visiting exporters - 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 around 3,500 regularly updated company profiles, are instrumental in providing buyers and suppliers with relevant company data on potential trade partners.

Export promotion programmes (EPP)
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

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