

# **Market Development**

**MARKET BRIEF ON**

**T-SHIRTS**

**OVERVIEW OF THE EUROPEAN UNION**

**SWITZERLAND**

**June 1996**

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SWITZERLAND**

ITC



**INTERNATIONAL TRADE CENTRE UNCTAD/WTO**

**GENEVA**

**June 1996**

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**MDPMD/96/0090**

# T-Shirts - Overview of the EU market

## PRODUCT DESCRIPTION

This market brief covers T-shirts, which are classified under the Combined Nomenclature (CN) as follows:

CN 61 09 T-shirts, single ts and other vests, knitted or croch e ted;  
 CN 61 09 10T-shirts, single ts and other vests, of cotton, knitted or croch e ted;  
 CN 61 09 90T-shirts, single ts and other vests, of other textile materials, knitted or croch e ted.

## OFFER

| <b>European Union: Production, Trade, Apparent Consumption</b> |                           |                       |                       |  |   |
|--|---------------------------|-----------------------|-----------------------|--|---|
|  | Production<br>(Mln Units) | Import<br>(Mln Units) | Export<br>(Mln Units) | Apparent<br>consumption<br>(Mln Units) | Apparent<br>per capita<br>consumption<br>(Unit) |
| 1991   | 462                       | 589                   | 90                    | 961                                    | 2.79  |
| 1992   | 447                       | 615                   | 96                    | 966                                    | 2.79  |
| 1993   | 446                       | 737                   | 99                    | 1084                                   | 3.12  |
| 1994   | 415                       | 735                   | 111                   | 1039                                   | 2.98  |

**Sources:** Production: CITH (Centre d'Information Textile-Habillement)  
 Trade (import/export): EUROSTAT-COMEXT

Notes: Trade covers imports and exports from /to extra-EU countries (12 members).

Owing to different product coverage of foreign trade and production data, apparent consumption is only indicative of the market size.

Because the method of data collection on trade flows between members of the EU was modified with the creation of the single European market (1 January 1993), data referring to 1991, 1992 are not comparable with the others. Since 1 January 1993 it has become practically impossible to assess the apparent consumption as per member country.

In 1994 imports, in terms of units, were 24.8% higher compared to 1991, while exports increased by 23.3%. During the same period apparent consumption slightly increased.

## **PRODUCTION**

During the period under review, EU production steadily decreased and in 1994 was 10% lower compared to 1991. The most dynamic trends in 1994 were in Spain and Italy; Germany experienced the largest European fall in production.

The EU clothing industry consists mostly of small and medium sized enterprises. Knitwear manufacturers and sportswear specialists are the principal producers of T-shirts. Major manufacturers export a large part of their production, the bulk of which is made of cotton.

Because labour costs are very high in most EU countries, the number of sub-contracting agreements with countries that have lower labour costs have increased. T-shirts are made outside the EU according to buyers' specifications regarding cut, size and style.

## **IMPORTS**

Annex I shows that in 1994 Germany was by far the principal importer, accounting for 34% of total EU imports in terms of units, followed by the United Kingdom and France (17% and 16% respectively). About 90% of EU imports consisted of cotton T-shirts, the rest being made of other textiles.

In 1994, 116 countries supplied T-shirts to EU, but a large majority of imports come from developing countries and economies in transition. As shown in annex II, the principal exporter was Bangladesh (10% of European imports by value, and 17 by quantity); its share of EU imports rose considerably and was in 1994 14.5% higher than in 1992 (in value terms). Other important suppliers were Turkey (whose market share is slightly decreasing), the United Arab Emirates and China. Statistical analysis indicates that imports from Eastern European countries increased considerably.

## **EXPORTS**

During 1991-1994, the principal EU exporter was Germany, followed by Italy, Spain and Greece.

The most important destination of extra-EU exports remained industrialized countries, in particular Austria, Switzerland, Finland, the USA and Japan. Eastern European countries, principally Poland, Bulgaria and Hungary were also important EU clients.

## MARKET CHARACTERISTICS

Leading brand names of sportswear or ready-to-wear articles specialize in the T-shirt sector and are well established on the European market. Many traders also buy plain T-shirts and print the logos themselves.

Consumers prefer cotton T-shirts to other textile fibres and generally follow fashion trends. Some specialized magazines giving fashion trends and logos are listed in the section of useful addresses. The magazine **Fashion News and Market Information** (CBI and Protade), disseminated free of charge to developing countries, gives useful information on fashion trends and market access conditions. T-shirts are in demand for sports and fitness activities, such as jogging, training, soccer, as well as for casual wear. T-shirts with long sleeves are also used to a large extent as nightwear and underwear.

## MARKET ACCESS

According to the Official Journal of the European Community L 319, 30 December 1995, in 1996 the duty rates applied by the European Union to imports of T-shirts were the following:

- autonomous 21%
- conventional 12.5 % which under the Uruguay Round will gradually decrease to 12% in annual instalments by 1 January 2000.

Imports from developing countries are regulated by the following conventions:

- Agreement on Textiles and Clothing (ATC): following the conclusion of the Uruguay Round, the ATC, which replaced the Multi-Fiber Arrangement (MFA), will last for a transitional period of ten years. In January 2005, the sector will be integrated into the rules of the GATT, and it will not be possible for any member country to maintain quantitative restrictions on imports of textiles and clothing, unless it can justify them under the safeguard provisions covered by the Agreement. Duty rates will remain, even though they will continue to be regularly reduced over the transition period.

- New Generalized System of Preferences (GSP): The new scheme of the GSP adopted by the Council of the European Union on December 1994 fixed as a priority objective the economic and social development of developing countries along with their progressive integration into the world economy. Preferential duties, which are no longer at zero rates for industrial products including textiles and are modulated depending on products (85% of the Common Custom Duty for t-shirts), are applied throughout the period of application of the scheme (1995-1998) without any quantitative restriction. The special provision for the Least Developed Countries allows for the total exemption of custom duties for industrial products. (source: Official Journal of the European Communities L208, 5 September 1995).

For further information, exporters are recommended to contact the European Commission:

Directorate General for External Economic Affairs,  
North-South Relations  
Unit I.K.3/GSP  
For the attention of Mr. F. NIZERY  
14, Rue de la Science,  
1049 BRUSSELS (BELGIUM)  
Tel: (322) 299 07 78  
Fax: (322) 299 10 47

Other trade agreements include the Lomé Convention which allows duty-free and quota-free imports of textile products from beneficiary countries.

To profit by preferential rates, goods must be accompanied by a certificate of origin (document issued by the authority in the exporting country to certify that the products are produced or manufactured in this country). The definition of the origin is particularly important in the case of two or more countries being involved in the production of a product and having different access conditions into the European Union. The Rules of Origin fall under a detailed regulation enacted by the European Commission. In general terms, the process undertaken in a country is considered as sufficient to confer the certificate of origin of this country, if it has resulted in a change of tariff classification in the Harmonized System Nomenclature between the input and the processed exported product. The certificate is issued by the competent authority in the exporting country.

There is a growing awareness of the need for environmental protection in Europe, especially in Germany. This is due partly to the world trend towards nature and health. This trend is used by companies to build a brand and an image, both in the company's advertising and in the message on eco-labels.

Natural fibres, including cotton, are affected by these initiatives. The production of synthetic fibres is increasing because the latest technological developments often show no disadvantages and sometimes even advantages in a comparable eco-balance sheet over a natural product.

In Germany, some synthetic materials such as carcinogenic dyes have been forbidden in imported textiles (see annex III on banned azo dyes). Any product found containing these substances and traded after 1 April 1996 will either be returned to the supplier or burned. Not complying with these requirements could cause a jail sentence of up to 3 years. A similar regulation was effective from the second half of 1996 in the Netherlands. Other EU countries are expected to follow.

Composition tests have to be performed on synthetic T-shirts that are to be imported in Germany. This test costs US\$ 1.56 per fibre.

## **PRICES**

In 1994, the unit value of EU imports from non EU countries (CIF basis) is around 2,16 ECU. Retail prices are influenced by factors such as quality, design manufacturer and international prices of fibres. Mail-order catalogues give the retail price of specific products which are generally well described.

## **SALES PROMOTION**

T-shirts of various brands and origins are displayed at trade fairs and exhibitions of sportswear or ready-to-wear articles.

Advertising is generally done through magazines and newspapers. Promotion of T-shirts for sports purposes, made by famous athletes or celebrities, have considerable impact on the consumer's propensity to purchase the goods. Sponsorship of sporting events are also a successful means of advertising, especially for large companies.

## **DISTRIBUTION CHANNELS**

The main import channels are importers, importers/manufacturers, agents (who may have show rooms) and wholesalers. Large departments stores generally obtain their supplies in bulk through central purchasing groups or groups specializing in the textile trade. Mail-order houses and independent retailers can buy directly from producers.



The major retail outlets are department stores, multiple chain stores, sporting-goods chain stores, clothing outlets, mail-order houses and discount stores. T-shirts are also available at fitness clubs where sports equipment is on sale to members. During the last few years, sales have steadily increased in hypermarkets and supermarkets. This is partly due to the attractive retail prices of T-shirts.

With the development of franchising and licensing, collections of fashion knitwear (including T-shirts) created in a specific country are sold in retail outlets throughout the EU.

Import Promotion Offices established to assist developing countries and some national trade promotion organizations offer among other services, lists of importers, wholesalers, distributors, etc., and assistance in establishing contacts particularly through publications of product offers (see useful addresses section E).

#### **COMMERCIAL PRACTICES**

Offers are generally accompanied by representative samples. Letters of credit are the usual method of payment for imports.

Department stores and mail-order firms observe strict delivery schedules and orders are placed about six months before delivery takes place.

#### **MARKET OPPORTUNITIES**

With imports amounting to US \$1,89 billion in 1994, EU is the world's largest market for T-shirts, followed by the USA (US \$961 million) and Japan (US \$750 million). The creation of the single market has given a chance to well-equipped producers in developing countries to penetrate the EU market (progressive suppression of quotas, discontinuation of the Multi-Fibre Arrangement, harmonization of standards, cost saving for exporters, access to several countries at the same time, etc.).

Demand is expected to grow in the coming years. As competition is becoming much stronger, new exporters from developing countries and economies in transition will have to offer good product quality and attractive prices.

New exporters in developing countries and economies in transition should contact EU Import Promotion Offices for assistance to export, particularly for establishing trade contacts.

**USEFUL ADDRESSES****A. Trade Associations**

Coordinating Committee for the  
Textile Industries  
24, rue Montoyer  
1040 Brussels  
Belgium  
Tel: (322) 230 95 80  
Fax: (322) 230 60 54  
Telex: 22380

International Textile Manufacturers  
Federation  
Am Schanze ngraben 29  
Postfach  
8039 Zürich  
Switzerland  
Tel: (411) 201 70 80  
Fax: (411) 201 71 34  
Telex: 817578 ITM F CH

Organisation européenne du  
commerce de gros en textile  
Adriaan Goekooplaan 5  
2517 The Hague  
The Netherlands  
Tel: (3170) 354 68 11  
Fax: (3170) 351 27 77  
Telex: 31440

European Association of National  
Organizations of Textile  
Retailers (AEDT)  
Vonde ls trasse 172  
1054 GV Amsterdam  
Netherlands  
Tel: (3120) 683 22 01  
Fax: (3120) 162 9 21

European Association of Clothing  
Industries  
47, rue Montoyer  
1040 Brussels  
Belgium

Tel: (322) 511 87 31  
Fax: (322) 514 87 31

**B. Style agencies and consultants**

CARLIN  
5, Rue Las Cases  
75007 Paris  
Tel: (331) 45 51 17 17  
Fax: (331) 45 51 99 21

IMI Deutsches Mode-Institut  
Mainzer Landstrasse 251  
6000 Frankfurt  
Germany  
Tel: (49 69 ) 759 528 61/63  
Fax: (49 69 ) 759 529 99

Domini que Pèclers  
23, rue du Mail  
75002 Paris  
France  
Tel: (331) 40 41 06 06  
Fax: (331) 42 36 12 76

Deutsches Institut für Herrenmode  
Messeplatz 1  
Postfach 210760  
5000 Köln  
Germany  
Tel: (49 221) 821 28 33

Cotton Service Büro  
Dieter Frank  
Greth erweg 82  
6000 Frankfurt 70  
Germany  
Tel: (49 69 ) 68 20 98  
Fax: (49 69 ) 68 14 79

**C. Specialized publications**

Styling News  
 Pilgers trasse 20  
 D-51491 Overath  
 Germany  
 Tel: (49 2206) 60 07 0  
 Fax: (49 2206) 60 07 17  
 BTX: (49 2206) 60 07 16#

MODOM  
 18, rue des Bons Enfants  
 75001 Paris  
 France  
 Tel: (331) 49 27 07 17  
 Fax: (331) 45 51 99 21

PROMOSTYL  
 31, rue de la Folie-Méricourt  
 75011 Paris  
 France  
 Tel: (331) 43 38 50 79

SCOTDIC  
 Lindens trasse 19  
 5000 Köln  
 Germany  
 Tel: (49 221) 219 207 89  
 Fax: (49 221) 234 245

SEASONS  
 21, rue des Jeûneurs  
 75002 Paris  
 Tel: (331) 40 39 99 39  
 Fax: (331) 40 39 99 36

Design Intelligence  
 14, Baltic Street  
 Barbican  
 London EC1Y 0TB  
 United Kingdom  
 Tel: (4471) 49 05 842  
 Fax: (4471) 49 05 120

Textile Month  
 World Textile Publications Ltd  
 Caidan House, Canal Road  
 Timperly, Altrincham  
 Cheshire WA14 1TD  
 Tel: (4461) 976 3636  
 Fax: (4461) 969 1801  
 Telex: 517617 Woolm n G

International Textiles  
 Benjamin Dent & Co. Ltd.  
 33 Bedford Place  
 London WC1B 5JX  
 United Kingdom  
 Tel: (4471) 637 22 11  
 Fax: (4471) 637 22 48  
 Telex: 89 54884

**D. Selected trade fairs**

SISELETE  
 International Sporting Goods and  
 Leisure Equipment Exhibition  
 (annual)  
 Comité des expositions de Paris  
 55, quai Alphonse Le Gallo  
 B.P. 317  
 92107 Boulogne-Billancourt  
 Cédex  
 France  
 Tel: (335) 49 09 61 44  
 Fax: (335) 49 09 61 06

Inter-Jeans  
 International Casual Wear and  
 Young Fashion Fair/Köln Messe  
 Messeplatz 1  
 Postfach 210760  
 5000 Köln 21  
 Germany  
 Tel: (49 221) 8210  
 Fax: (49 221) 8212574  
 Telex: 8873426

International Ladies Ready-to-wear  
Exhibition and Section Boutique  
(twice yearly) PRO FEM  
5, rue Caumartin  
75009 Paris  
France  
Tel: (331) 42 68 08 40  
Fax: (331) 42 68 06 45

Apparel International  
The Journal of the Clothing and  
Footwear Industry  
The White House  
60, High Street  
Potters Bar  
Herts. EN6 5AB  
United Kingdom  
Tel: (44707) 56828  
Fax: (44707) 45322

Collections Premiere n Dusseldorf  
(twice yearly)  
IGEDO Internationale Modemesse  
Krone n GmbH & Co. KG  
Danziger Strasse 101  
4000 Dusseldorf 30  
Germany  
Tel: (49 211) 43 96 01  
Fax: (49 211) 43 96 345  
Telex: 8584823

S.I.M.E.  
International Children's Fashion  
Trade Show (twice yearly)  
PDCO Blenheim  
22-24, rue du Président Wilson  
92532 Levallois-Perret Cédex  
France  
Tel: (331) 47 56 50 00  
Fax: (331) 47 56 92 92  
Telex: 614645

MIAS (estate Anve mo)  
International Sport Articles Trade  
Fair (twice yearly)  
E.G. Mias  
Via Pettini, 16  
20149 Milan  
Italy  
Tel: (39 2) 330 01 35  
Fax: (39 2) 311 18 2

International Men and Boy's Wear  
Trade Show (twice yearly)  
PROMAS  
8, rue de Richelieu  
75001 Paris  
Tel: (331) 42 96 15 25  
Fax: (331) 42 61 77 03  
Telex: 22 08 82

Milanovende moda  
Fashion and Ready-to-wear  
(twice yearly)  
Viale Sarca, 223  
20126 Milan  
Italy  
Tel: (39 2) 66 10 35 55  
Fax: (39 2) 66 10 16 38

### E. Trade contacts

#### 1) IMPORT PROMOTION ORGANIZATIONS

### AUSTRIA

Wirtschaftskammer Oesterreich (WKO)  
(Austrian Fed. Economic Chamber)  
Foreign Trade Department  
Wiedner Hauptstrasse 63, POB 150  
1045 VIENNA  
Phone: (431) 50105  
Fax: (431) 50206255  
E-Mail: [WHIS@AW.WKOR.AT](mailto:WHIS@AW.WKOR.AT)  
E-Serv: (INTERNET)

ISPO - Frühjahr  
International Trade Fair for Sports  
Equipment and Fashion (annual)  
Münchener-Messe  
Postfach 121009  
8000 München  
Germany  
Tel: (49 89) 510 70  
Fax: (49 89) 510 75 06

PITTI IMAGINE  
(Uomo/Teenager/Bimbo)  
(twice yearly)  
Ente Moda Italia  
Via Faenza, 109  
50123 Firenze  
Italy  
Tel: (39 55) 369 34 01  
Fax: (39 55) 369 34 00

### DENMARK

DIFD  
(Danish Import Promotion Office  
for Products from Developing  
Countries)  
Danish Chamber of Commerce  
Boersen  
1217 COPENHAGEN  
Phone: (45) 339 50500  
Fax: (45) 33120525

### FRANCE

PROMEX-FMA  
(Agence française pour la  
promotion des exportations  
des pays les moins avancés)  
10, avenue d'Iéna  
75016 PARIS  
Phone: (331) 40733067  
Telex: 645412 cfce f  
Fax: (331) 407339 69  
**Assists only Least Developed  
Countries (LDCs).**

Telex: 610396 apccif

## GERMANY

Bundess t e l l e f i r  
Ausse n h a n d e l s i n f o r m a t i o n ( B f A I )  
( F e d . O f . o f F o r e i g n T r a d e I n f m )  
D e p a r t m e n t Z 5  
A g r i p p a s t r a s s e 87-93, B o x 100522  
50445 C O L O G N E  
P h o n e : ( 49 221 ) 20570  
F a x : ( 49 221 ) 2057212

PRO TRADE - D e u t s c h e  
G e s e l l s c h a f t f i r T e c h n i s c h e  
Z u s a m m e n a r b e i t  
( G T Z ) G m b H  
( G e r m a n A g e n c y f o r T e c h . C o o p . )  
P . O . B o x 5180  
65726 E S C H B O R N  
P h o n e : ( 49 619 6 ) 79 3169  
T e l e x : 407501 g t z d  
F a x : ( 49 619 6 ) 79 7372

## ITALY

I s t i t u t o N a z i o n a l e p e r i l C o m m e r c i o  
E s t e r o ( I C E )  
( I n s t i t u t i t a l i e n p o u r l e c o m m e r c e  
e x t e r i e u r )  
U f f i c i o C o o p e r a z i o n e  
V i a L i s z t , 21  
00144 R O M E - E U R  
P h o n e : ( 39 6 ) 59 9 29 59 1  
T e l e x : 610160 i c e m i  
F a x : ( 39 6 ) 59 647438

## NETHERLANDS

C B I - C e n t r e f o r P r o m o t i o n o f  
I m p o r t s f r o m D e v e l o p i n g  
C o u n t r i e s  
T r a d e P r o m o t i o n S e c t i o n  
B e u r s p l e i n 37, P . O . B o x 30009  
3001 D A R O T T E R D A M  
P h o n e : ( 3110 ) 2013434  
T e l e x : 27151 c b i b z n l  
F a x : ( 3110 ) 4114081

## SWEDEN

S w e d i s h I n t e r n a t i o n a l D e v e l o p m e n t  
C o o p e r a t i o n A g e n c y  
T r a d e P r o m o t i o n D i v i s i o n  
105 25 S T O K H O L M  
P h o n e : ( 468 ) 69 85000  
F a x : ( 468 ) 208864

## UNITED KINGDOM

D E C T A C o n s u l t i n g  
S t . N i c h o l a s H o u s e  
S t . N i c h o l a s R o a d  
S U T T O N , S u r r e y S M 1 1 E L  
P h o n e : ( 44181 ) 6433311  
F a x : ( 44181 ) 6438030  
E - m a i l : A F 0 5 @ C I T Y S C A P E . C O . U K  
E - S e r v : ( I N T E R N E T )

### ***Other countries can contact***

A s s e m b l e e p e r m a n e n t e s d e s c h a m b r e s d e  
c o m m e r c e e t d ' i n d u s t r i e ( A P C C I )  
S e r v i c e d e s r e l a t i o n s e c o n o m i q u e s  
i n t e r n a t i o n a l e s  
45, a v e n u e d ' l e n a  
75016 P A R I S  
P h o n e : ( 331 ) 47220111

2) OTHER FOREIGN TRADE BODIES**BELGIUM**

Fédération nationale des  
chambres de commerce  
et d'industrie de Belgique  
1-2, avenue des Arts  
Kunstlaan, B.P 10  
1040 BRUXELLES  
Phone: (322) 2174542  
Fax: (322) 2174634  
Cable: FEDENATCOM

**GREECE**

Union of Hellenic Chambers of  
Commerce and Industry  
External Trade & International Relations  
Department  
7-9, Akadimias street  
10671 ATHENS  
Phone: (301) 3632702  
Fax: (301) 3622320

**LUXEMBOURG**

Chambre de Commerce du  
Grand-Duché de Luxembourg  
Service du commerce extérieur  
7, rue Alcide de Gaspéri  
B.P 1503  
2981 LUXEMBOURG  
Phone: (352) 4239 39 1  
Telex: 60174 chcom lu  
Fax: (352) 438326

**SPAIN**

Consejo Superior de Cámaras  
Oficiales de Comercio, Ind. y  
Navegación de España  
Servicio de Comercio Exterior  
Claudio Coello, 19  
28001 MADRID

Phone: (341) 2753400  
Fax: (341) 435239 2

**FINLAND**

The Central Chamber of  
Commerce of Finland  
Dept for International Relations  
World Trade Centre  
Aleksanterinkatu 17  
P.O box 1000  
00101 HELSINKI  
Phone: (3580) 69 69 69  
Telex: 124813 chamb fi  
Fax: (3580) 650303

**IRELAND**

An Bord Tráchtála  
(The Irish Trade Board)  
Market Information Centre  
Merrion Hall  
Strand Road, Sandymount  
DUBLIN 4  
Phone: (3531) 269 5011  
Fax: (3531) 269 5820

**PORTUGAL**

The Secretary General  
Câmara de Comércio e Indústria  
Portuguesa  
Dep. Comercial  
Rua das Portas de S. António, 89  
119 4 LISBON CODEX  
Phone: (3511) 3423277  
Telex: 13441 aclcc p  
Fax: (3511) 3424304

## Annex I

| European Union: imports of T-shirts from non-EU countries, 1991-1994, CN 61 09<br>(V: ECU '000, Units '000) |         |           |         |           |         |           |         |           |
|---|---------|-----------|---------|-----------|---------|-----------|---------|-----------|
|   | 1991    |           | 1992    |           | 1993    |           | 1994    |           |
|   | Units   | V         | Units   | V         | Units   | V         | Units   | V         |
| <b>EU (12 countries)</b>  | 588,975 | 1,281,216 | 614,550 | 1,433,221 | 737,354 | 1,628,808 | 735,131 | 1,588,969 |
| <b>Germany</b>  | 224,455 | 546,586   | 208,924 | 578,829   | 259,949 | 667,798   | 251,431 | 647,306   |
| <b>France</b>   | 103,619 | 224,629   | 103,024 | 235,476   | 114,714 | 259,175   | 121,205 | 257,108   |
| <b>United Kingdom</b>   | 95,608  | 203,429   | 103,024 | 232,571   | 130,117 | 258,799   | 124,881 | 255,581   |
| <b>Netherlands</b>  | 55,409  | 111,228   | 73,139  | 152,524   | 84,149  | 174,887   | 85,570  | 174,887   |
| <b>Italy</b>  | 47,844  | 77,607    | 48,476  | 87,577    | 50,531  | 80,151    | 42,416  | 80,151    |
| <b>Belgium - Luxembourg</b>   | 24,561  | 50,042    | 29,769  | 53,298    | 42,857  | 73,820    | 51,419  | 73,820    |
| <b>Denmark</b>  | 15,400  | 26,402    | 14,307  | 29,267    | 24,304  | 55,363    | 26,867  | 55,363    |
| <b>Spain</b>  | 13,125  | 26,411    | 22,246  | 49,061    | 19,292  | 30,863    | 22,873  | 30,863    |
| <b>Ireland</b>  | 4,192   | 9,330     | 2,531   | 5,325     | 3,356   | 6,343     | 2,721   | 6,343     |
| <b>Greece</b>   | 2,912   | 3,311     | 4,158   | 4,757     | 4,769   | 4,971     | 4,011   | 4,971     |
| <b>Portugal</b>   | 1,851   | 2,241     | 1,611   | 4,536     | 3,315   | 2,576     | 1,738   | 2,576     |

Source: EURO STAT-COMEXT



## Annex II

| European Union: principal non-EU suppliers of T-shirts in 1994, CN 61 09<br>(Q: metric tons; V: ECU '000, Units) |         |           |             |                         |
|--|---------|-----------|-------------|-------------------------|
|  | Q       | V         | Units       | index 94/93<br>of value |
| <b>Total imports from non-EU countries of which:</b>   | 133,340 | 1,588,969 | 735,130,801 | -2.45                   |
| Turkey   | 16,236  | 305,116   | 67,562,289  | -1.77                   |
| Bangladesh   | 23,571  | 159,540   | 133,123,017 | 14.47                   |
| China  | 8,899   | 95,895    | 51,499,908  | 27.55                   |
| Hong Kong  | 4,912   | 93,607    | 23,987,832  | -13.36                  |
| Mauritius  | 5,442   | 79,659    | 28,241,532  | -7.65                   |
| India  | 5,675   | 77,991    | 26,959,765  | -18.96                  |
| U.A. Emirates  | 12,094  | 76,125    | 69,365,966  | -11.04                  |
| USA  | 3,123   | 48,172    | 14,881,786  | -32.64                  |
| Morocco  | 3,131   | 47,058    | 17,914,344  | 7.94                    |
| Indonesia  | 2,905   | 44,717    | 15,957,284  | 5.12                    |
| Tunisia  | 2,958   | 40,022    | 19,133,293  | 41.38                   |
| Egypt  | 4,149   | 38,252    | 21,108,090  | -0.80                   |
| Thailand   | 2,653   | 37,599    | 14,932,988  | 0.66                    |
| Brazil   | 2,207   | 26,769    | 17,470,718  | -28.57                  |
| Sri Lanka  | 2,508   | 24,594    | 13,406,661  | 2.64                    |
| Syria  | 3,233   | 21,963    | 21,490,779  | -0.76                   |
| Hungary  | 1,605   | 21,536    | 12,967,713  | 29.32                   |
| Pakistan   | 2,371   | 20,988    | 14,146,986  | -2.17                   |
| Poland   | 1,447   | 16,565    | 9,591,436   | 23.06                   |
| Croatia  | 1,470   | 16,144    | 10,533,228  | -19.75                  |

Source: EURO STAT-COMEXT

### Annex III

#### ban on azo carcinogenic dyes in Germany

|   |          |
|---|----------|
| 2-Naphthylamine                           | 91-59-8  |
| 3,3'-Dichlorobenzidine                    | 91-94-1  |
| 4-Aminodiphenyl                           | 92-67-1  |
| Benzidine                                 | 92-87-5  |
| o-Toluidine                               | 95-53-4  |
| 4-Chlorotoluidine                         | 95-69-   |
| 2,4-Toluylenediamine                      | 95-80-7  |
| o-Aminoazotoluol                          | 97-56-3  |
| 2-Amino-4-nitrotoluol                     | 99-55-8  |
| 4,4'-Methylen-bis(2-chloraniline)         | 101-14-4 |
| 4,4'-Diaminodiphenylmethane               | 101-77-9 |
| 4,4'-Oxydianiline                         | 101-80-4 |
| p-Chloraniline                            | 106-47-8 |
| 3,3'-Dimethoxybenzidine                   | 119-90-4 |
| 3,3'-Dimethylbenzidine                    | 119-93-7 |
| p-Kresidin                                | 120-71-8 |
| 2,4,5-Trimethylaniline                    | 137-17-7 |
| 4,4'-Thiodianiline                        | 139-65-1 |
| 2,4-Diaminoanisol                         | 815-05-4 |
| 3,3'-Dimethyl-4,4'-diaminodiphenylmethane | 838-88-0 |

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## T-Shirts - Overview of the Swiss market

### PRODUCT DESCRIPTION

|             |  |
|-------------|--|
| HS 61.09.10 | T-shirts, single ts and other vests, of cotton, knitted and croch e ted.                 |
| HS 61.09.90 | T-shirts, single ts and other vests, of other textile materials, knitted or croch e ted. |

### PRODUCTION

The Swiss textile industry invests large amounts of money in technology, machinery and inputs to ensure a high-quality product. This, in addition to high labour costs, renders much of Swiss apparel relatively expensive. Statistical data on T-shirt production are not available. According to trade sources, production is rather stable.

### TRADE

The following table shows Swiss foreign trade of T-shirts of cotton and other textile materials.

(See annex for details on major suppliers to Switzerland).

| T-shirts              |         |        |         |        |
|-----------------------|---------|--------|---------|--------|
| Q: tons<br>V: SF '000 | Imports |        | Exports |        |
|                       | Q       | V      | Q       | V      |
| 1992                  | 1,014   | 70,315 | 462     | 45,355 |
| 1993                  | 1,098   | 72,100 | 471     | 51,570 |
| 1994                  | 1,109   | 69,711 | 448     | 47,981 |
| 1995                  | 1,299   | 72,674 | 386     | 40,184 |

Source: Statistique annuelle du commerce exté rieur de la Suisse

## MARKET CHARACTERISTICS

In recent years, a shift occurred in consumption patterns in Switzerland. Consumers are spending more money on vacations rather than on clothing. However, this shift goes hand in hand with sales of sport and leisure wear, an area in which T-shirts constitute a significant item. The Swiss market is very demanding because of a strong preference for high quality items. Fashion usually follows trends of major European countries.

## MARKET ACCESS

Import duties: - Normal rate: for cotton T-shirts SF 205 per 100kg gross  
for T-shirts of other textile materials SF 550 per 100kg gross.  
- No rate of duty for EC/C + EFTA/L  
- Developing countries (except Hong Kong, Macao, the Democratic People's Republic of China and Korea): 50% of normal rate; LDCs are exempt.

No other measures are currently in effect. Unlike most members of the MFA, Switzerland has no quotas on imports of textile and clothing goods.

## PRICES

Mail-order catalogues (Spengler, Veillon, etc.) give information on representative products marketed. Domestically produced goods are generally more expensive than imports. Mark-up pricing on imported T-shirts can be up to 250%, depending on the retailer. C.i.f. prices per T-shirt imported from more competitive countries are between US\$2 to 5.

## SALES PROMOTION

Some retailers, like Migros or Spengler, sell "economy packs" of selected clothing articles in which three or more items are sold at a discount price. This could be a potential marketing angle to be considered for T-shirts. During summer, some boutiques also cut prices by half or sometimes even more. Market research assessing market requirements, especially quality, is a necessary step when exporting to Switzerland.

## **DISTRIBUTION CHANNELS**

The center of the Swiss trade apparel with Asian countries is in Hong Kong, where the network for T-shirts has been established. Some Swiss importers of T-shirts deal directly with agents through the Textile and Mode Center (see list of useful addresses).

Small-scale retailers buy from boutiques and speciality stores, either directly or through agents. Some of them visit neighboring countries, to buy small quantities of T-shirts, often on a trial basis. Large retailers, such as Migros, Jelmoli, Coop, Place tte, generally import through buying agents. Some retailers get together to buy an agreed amount of T-shirts in specific colours and styles, which is then divided among themselves.

## **COMMERCIAL PRACTICES**

The Swiss traders use mostly letter of credit to pay shipments from distant countries. They are very strict about delivery schedules and terms of contracts; orders are placed only after a thorough inspection of some samples.

## **MARKET OPPORTUNITIES**

With imports totalling Sfr. 72.7 million in 1995, Switzerland is one of the largest European importers, in spite of its small population. Swiss importers usually attend major clothing fairs to establish trade contacts. Producers in Asian countries can contact Swiss agents in Hong Kong, as exporters from China and India often do. Exporters from developing countries can obtain assistance from OSEC (Swiss Office for Trade Promotion: see list of useful addresses). They can send offers to this office, specifying quantities per order, prices and enclosing samples. Good opportunities exist for exporters complying with Swiss market requirements, in particular quality, fashion and delivery schedules.

**USEFUL ADDRESSES****A. Selected importers**

Kabri Fashion SA  
45B, route des Acacias  
1227 Carouge  
Tel: (4122) 342 91 60  
Fax: (4122) 343 43 94

Pandinavia Import/Export  
Robert A. Zulliger  
P.O. Box 296  
3000 Bern 25  
Tel: (4131) 331 40 32  
Fax: (4131) 333 06 93

Socorex-Textil  
P.O. Box 217  
8021 Zürich  
Tel: (411) 242 65 55  
Fax: (411) 242 68 56

U.P.S. - Sport Trading  
Löwengartstrasse 10  
9400 Rorschachberg  
Tel: (4177) 96 34 39  
Fax: (4177) 45 21 24

**B. Large retail chains and department stores**

Manor AG  
Rebgasse 39  
4005 Basel  
Tel: (4161) 686 11 11  
Fax: (4161) 681 11 92

Neue Warenhaus  
EPA/UNIP  
Beldersstrasse 49  
8027 Zürich  
Tel: (411) 287 11 11  
Fax: (411) 287 11 01

ABM  
Giesshubelstrasse 4  
8045 Zürich  
Tel: (411) 288 81 11  
Fax: (411) 201 15 21

Migros-Genossenschaftsbund  
Limmattstrasse 152  
Postfach 266  
8031 Zürich  
Tel: (411) 277 21 11  
Fax: (411) 277 25 25

**C. Mail-order houses**

Charles Veillon SA  
Case postale 1486  
1030 Bussigny- Lausanne  
Tel: (4121) 702 29 11  
Fax: (4121) 702 29 81

Splengler AG  
(Ready-to-Wear Clothing and Textiles)  
4142 Munchesstein  
Tel: (4161) 415 21 11  
Fax: (4161) 411 13 46



**D. Other addresses**

Office Suisse d'Expansion Commerciale  
(OSEC)  
4, avenue de l'Avant-Poste  
Case Postale 1128  
1001 Lausanne  
Tel: (4121) 320 32 31  
Fax:(4121) 320 73 37

Verband Kaufmännischer Agenten  
der Schweiz (Association of Swiss  
Agents)  
c/o Textil & Mode Center  
P.O. Box 934  
8065 Zürich  
Tel: (411) 829 23 30

Textil & Mode Center  
Talackerstrasse 13 und 17  
Glatbrugg  
Zürich  
Tel: (411) 829 21 11

Swiss fashion  
Gesamtvverband der Schweizerischen  
Bekleidungsindustrie  
Gothardsstrasse 61  
8027 Zürich  
Tel: (411) 202 06 51

Verband der Schweizerischen  
Textilfertigwaren- Importeure Commercial  
(Association of Swiss importers of  
finished textiles products)  
Zeughausstrasse 31  
P.O. Box 217  
80021 Zürich  
Tel: (411) 242 65 55

Mode Information  
Heinz Kramer GmbH  
Fliegerstrasse 20,  
D-51491, Overath  
Germany  
Fax: (49 2206) 60 07 17



**Annex**  
**Switzerland Imports**

*H.S. 61.09.10 T-shirts, singlets and other vests, of cotton, knitted or crocheted*

U=units '000 V=SF '000

| Origins               | 1992         |               | 1993         |               | 1994         |               | 1995         |               |
|-----------------------|--------------|---------------|--------------|---------------|--------------|---------------|--------------|---------------|
|                       | U            | V             | U            | V             | U            | V             | U            | V             |
| <b>Total imports:</b> | <b>7,409</b> | <b>58,367</b> | <b>8,283</b> | <b>59,401</b> | <b>7,523</b> | <b>53,998</b> | <b>8,152</b> | <b>55,061</b> |
| Germany               | 2,366        | 21,025        | 2,319        | 19,886        | 1,944        | 16,089        | 2,150        | 17,588        |
| Ireland               | 439          | 8,537         | 464          | 10,595        | 391          | 8,757         | 362          | 7,079         |
| Austria               | 1,519        | 8,866         | 1,273        | 7,600         | 1,198        | 7,269         | 1,272        | 6,961         |
| India                 | 769          | 2,237         | 1,416        | 4,129         | 1,174        | 3,618         | 1,184        | 3,623         |
| France                | 251          | 3,985         | 174          | 2,509         | 146          | 1,886         | 241          | 3,135         |
| Italy                 | 269          | 3,542         | 359          | 2,701         | 375          | 3,093         | 367          | 3,058         |
| China                 | 338          | 980           | 489          | 1,859         | 642          | 2,915         | 499          | 2,258         |
| Greece                | 113          | 627           | 233          | 1,019         | 261          | 1,560         | 309          | 2,104         |
| Portugal              | 410          | 2,371         | 342          | 1,498         | 277          | 1,555         | 400          | 1,760         |
| Turkey                | 196          | 1,290         | 217          | 1,260         | 212          | 1,219         | 259          | 1,547         |
| Hong-Kong             | 135          | 1,052         | 229          | 1,642         | 140          | 957           | 194          | 945           |
| Netherlands           | 37           | 381           | 39           | 476           | 39           | 506           | 74           | 753           |
| Denmark               | 25           | 399           | 40           | 738           | 47           | 667           | 81           | 675           |
| Israel                | 105          | 582           | 218          | 1,070         | 159          | 1,118         | 119          | 390           |

**Source:** Statistique annuelle du commerce extérieur de la Suisse

*H.S. 61.09.90 T-shirts, singlets and other vests, of man-made fibers, knitted or crocheted.*

Q=kg V=SF '000

| Origins               | 1992           |               | 1993           |               | 1994           |               | 1995           |               |
|-----------------------|----------------|---------------|----------------|---------------|----------------|---------------|----------------|---------------|
|                       | Q              | V             | Q              | V             | Q              | V             | Q              | V             |
| <b>Total imports:</b> | <b>116,427</b> | <b>11,948</b> | <b>134,469</b> | <b>12,638</b> | <b>164,199</b> | <b>15,713</b> | <b>222,008</b> | <b>17,613</b> |
| Germany               | 45,848         | 5,608         | 46,907         | 5,174         | 47,041         | 4,294         | 49,554         | 5,436         |
| France                | 12,917         | 1,342         | 12,706         | 1,304         | 16,090         | 1,559         | 22,394         | 1,851         |
| Ireland               | 2,066          | 896           | 3,391          | 808           | 7,226          | 2,074         | 4,984          | 1,649         |
| Greece                | 668            | 37            | 8,758          | 408           | 9,991          | 559           | 33,566         | 1,552         |
| Italy                 | 7,793          | 1,039         | 16,242         | 1,101         | 21,315         | 1,806         | 17,910         | 1,426         |
| Great Britain         | 16,346         | 980           | 7,354          | 440           | 6,538          | 434           | 17,055         | 915           |
| Portugal              | 7,012          | 396           | 7,865          | 491           | 9,247          | 558           | 7,910          | 486           |
| Turkey                | 1,241          | 80            | 4,444          | 313           | 3,527          | 180           | 6,759          | 389           |
| Denmark               | 1,487          | 136           | 1,120          | 87            | 5,377          | 313           | 5027           | 323           |
| Israel                | 376            | 43            | 5,836          | 929           | 5,432          | 848           | 2,207          | 255           |
| USA                   | 1,631          | 103           | 500            | 38            | 881            | 111           | 1,765          | 150           |
| Australia             | 7,135          | 1,000         | 3,283          | 537           | 3,539          | 615           | -              | -             |

NB: Units not available

**Source:** Statistique annuelle du commerce extérieur de la Suisse

