

Market Development

MARKET BRIEF ON
TOILET AND KITCHEN LINEN OF TERRY TOWELLING

OVERVIEW OF THE EUROPEAN COMMUNITY
1993

ITC



INTERNATIONAL TRADE CENTRE UNCTAD/WTO

Toilet and kitchen linen of terry towelling - EC Overview

Product description

HS 6302.60 Toilet and kitchen linen, of terry towelling or similar terry fabrics, of cotton

Trade

| V: ECU '000 | 1990 | | 1991 | | 1992 | |
|----------------|---------|--------|---------|--------|---------|--------|
| Q: metric tons | V | Q | V | Q | V | Q |
| Total imports | 533,113 | 70,206 | 583,944 | 78,067 | 603,041 | 80,530 |
| Total exports | 433,047 | 49,651 | 440,741 | 49,446 | 423,026 | 46,543 |

Source: Eurostat.

Germany, France and the United Kingdom are the main importing countries within the European Community, accounting for 67% of total EC imports in 1992. Intra-EC trade accounted for 60% on average of total value of imports during the period under review.

Main origins of imports (1992, % import value)

Portugal (28), Belgium-Luxembourg (16), Brazil (7), Turkey (7), Germany (4). Other suppliers among developing countries include Pakistan, China, India, Indonesia and Sri Lanka.

Market characteristics

Households, hotels and hospitals are the main consumers of hand and bath terry towelling. As these products are frequently washed, quality and color fastness are important, both for the linen supply business and for purchasers. Demand for king size bath towels and printed patterns is constantly increasing. The use of environmentally friendly materials such as pure cotton is gradually gaining in importance as awareness of environmental issues in general is growing in Europe.

General specifications for good quality terry towels

- ◆ Minimum weight of 400 g/sq. m.
- ◆ Warp: Ne 30/2
- ◆ Loop: Ne 20/2
- ◆ Weft: 16/1

General specifications for cheaper quality terry towels

- ◆ Weight of 300 g/sq. m.
- ◆ Warp: Ne 16/1
- ◆ Loop: Ne 16/1
- ◆ Weft: 16/1

Most common/standard towel sizes (cm)

- ◆ Hand towels: 50 x 90/100, 55 x 110, 60 x 120
- ◆ Bath and beach towels: 60 x 180, 70 x 130, 75 x 150, 80 x 140, 90 x 150, 90 x 170, 100 x 150/170, 140 x 160
- ◆ Guest hand towels: 40 x 60
- ◆ Washing gloves: 15 x 20

Market access

The EC is a party to the Multi-Fibre Agreement (MFA); imports of textile products, including toilet and kitchen linen, are subject to quotas under bilateral agreements with supplier countries. Until 1993, each member of the EC had a national quota allotment. However, with the creation of the Single Market in 1993, a single EC quota is negotiated and national quotas no longer apply in principle.

Preferential treatment may also be accorded to developing countries under the Generalized System of Preferences (GSP). The document "Council Regulation (EEC) No. 3832/90 lists MFA textile products that are subject to Community tariff ceilings allocated among Member States. The EC common external tariff for toilet and kitchen linen is 13% ad valorem.

Distribution channels

Imports of toilet and kitchen linen are usually made by specialized importers and agents. However, Large retailers import direct or through their buying agents, in general. The main retail outlets for terry towelling are department stores, retail chains, mail-order houses (which use central buying organizations) and specialized stores such as home furnishing retailers. (A list of importers is provided below.)

Commercial practices

Traders buy on the basis of samples. Most department stores have biannual sales in the summer and winter seasons. Retail outlets continuously introduce new patterns and designer lines to increase their sales volume.

Packaging and labelling

Toilet and kitchen linen are generally packed in plastic bags, either individually or in sets. Retail packaging is sometimes handled by the importer. Each article must be labelled with information on sized, material composition and washing instructions.

Sales promotion

A number of trade fairs are held throughout Europe and are well attended by the trade (see Useful addresses). Visits can prove useful to collect information on the latest trends and to establish contact with potential partners. In addition, advertisements can be placed in specialized revues on interior decoration and house furnishings.

Market opportunities

With imports reaching ECU 603 million in 1992, the EC represents a considerable market for terry towelling. In 1992 alone, imports increased by approximately 13% in value terms, compared with 1990, but only by 3% between 1991 and 1992 due to the global economic recession and general reduction in consumer expenditure. Germany, France and the United Kingdom are expected to remain the major importers. Developing countries share of sales has risen steadily over the period under review. Importers are interested in new suppliers offering low prices for appropriate quality.

Useful addresses

Trade Fairs

Fair: Heimtextil
Frequency: Annual (12-15 Jan'94)
Organizer: Messe Frankfurt GmbH
Postfach 150210
6000 Frankfurt
Germany
Telephone: (49 69) 75750
Telefax: (49 69) 7576433

Fair: Pitti Imagine Casa
Frequency: Annual (Jan'94)
Organizer: Pitti Imagine srl
Via Faenza 109
50123 Florence
Italy
Telephone: (39 55) 36931
Telefax: (39 55) 3693200

Fair: Inter Decor
Frequency: Annual (September)
Organizer: Royal Dutch Fairs
Jaarbeursplein
P.O. Box 8500
3503 RM Utrecht
The Netherlands
Telephone: (31 30) 955911
Telefax: (31 30) 940379

Fair: Tex'Styles
Frequency: Annual (January)
Organizer: Pado Groupe-Blenheim
22-24, rue du Prés
Wilson
92532 Paris
France
Telephone: (33 1) 47565000
Telefax : (33 1) 47569292

Fair: Textirama Home
Frequency: Annual (August)
Organizer: Textirama
Martelaarslaan 45
9000 Gent
Belgium
Telephone: (32 91) 235911
Telefax: (32 91) 236642

Fair: Fabrex
Frequency: Biannual (Mar/Oct)
Organizer: Philbeach Events Ltd
Earls Court
Exhibition Centre
Warwick Road
London SW5 9TA
United Kingdom
Telephone: (44 71) 3708201
Telefax: (44 71) 3708142

Fair: Textilhogar
Frequency: Annual (September)
Organizer: Feria Muestrario International
de Valencia
Apartado 476
46080 Valencia
Spain
Telephone: (34 6) 3861100
Telefax: (34 6) 3636111

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Toilet and kitchen linen of terry towelling - Germany

Trade

| V: ECU '000 | 1990 | | 1991 | | 1992 | |
|----------------|---------|--------|---------|--------|---------|--------|
| Q: metric tons | V | Q | V | Q | V | Q |
| Imports | 132,400 | 16,988 | 167,333 | 21,403 | 170,336 | 21,505 |
| Exports | 43,440 | 3,689 | 39,279 | 3,430 | 34,138 | 2,694 |

Source: Eurostat.

In 1990 the German total production of towelling amounted to 48.9 million units. Production of household linen in general increased from DM 41.3 million in 1989 to DM 48.4 million in 1991, indicating an upward trend in this sector.

Main origin of imports

The principal supplying countries to Germany in 1992 were (in % of total import value): Portugal (18), Brazil (13), Austria (11), Turkey (11), Belgium-Luxembourg (10), United Kingdom (4), Pakistan (4). Other suppliers among developing countries: China, Indonesia, Syria and India.

Market characteristics

Germany was the largest EC importer of terry towelling in 1992, accounting for 28% of total EC imports (in terms of value). German consumers have high quality requirements for household textiles in general, and prefer plain dyed towels.

The most common towel sizes are the following (in cm):

- ◆ hand towels: 40 x 60; 50 x 100
- ◆ bath towels: 70 x 140 and 70 x 150; 75 x 130 and 75 x 150;
80 x 120; 120 x 150 and 120 x 160;
130 x 160 and 140 x 160
- ◆ beach towels: 70 x 180 and 100 x 200
- ◆ kitchen towels: 40 x 60; 45 x 70; 50 x 50 and 50 x 70
- ◆ guest towels: 30 x 50; 40 x 80; 58 x 80

Distribution channels

In Germany, home textiles are mainly distributed by large department stores followed by groups of independent, specialized retailers and mail-order houses.

Market opportunities

Imports increased by 28% (in terms of value) during the period 1990-1992, and the share of developing countries raised considerably. However, due to a global economic recession and to a general reduction of expenditure in consumer goods, the market is expected to stabilize. Imports of towelling in the low-medium segment of the market will still continue to increase. Good prospects are therefore foreseeable to those exporters in developing countries offering competitive products of good quality.

Toilet and kitchen linen of terry towelling - France

Trade

| V: ECU '000 | 1990 | | 1991 | | 1992 | |
|----------------|---------|--------|---------|--------|---------|--------|
| Q: metric tons | V | Q | V | Q | V | Q |
| Imports | 111,875 | 13,675 | 115,300 | 14,148 | 126,878 | 15,538 |
| Exports | 10,139 | 769 | 17,379 | 1,254 | 18,167 | 1,371 |

Source: Eurostat.

Annual production of terry towelling in France is estimated at 6,000 metric tons.

Main origin of imports

The principal supplying countries to France in 1992 were (in % of total import value): Belgium-Luxembourg (40), Portugal (25), Turkey (5), Germany (4), Pakistan (4), Brazil (3), Italy (3). Other suppliers among developing countries: China, India, Sri Lanka and Egypt.

Market characteristics

France was the second largest EC import market in 1992, accounting for 21% of total EC imports (in terms of value). Between 1990-1992 imports increased by 13%. Bathroom towelling is the most important market segment within the household linen sector. Demand favors bright colors, printed designs and jacquard towels. Cotton velvet-stretch is also appreciated for its softness. Consumers prefer high-quality items made of terry cotton fabrics of a thicker and more wash-resistant grade. Large-sized towels, including beach towels with fancy printing, are becoming fashionable. Sales growth of towels and bathrobes has been particularly high in recent years. The most common towel sizes are the following: 50 - 60 x 70 - 100 cm; 70 - 100 x 130 - 150 cm. Bathrobes have an average weight of 420 g/sq.m.

Distribution channels

Outlets are specialized stores, department stores, supermarket chains, hyper markets, mail-order houses and small retailers. Sales in specialized stores have increased in recent years. Important buying groups act on behalf of the main independent department stores and supermarkets. Small independent retailers, market stall operators and several central buying organizations order through importers. Many importers hold stocks for direct distribution to retailers and wholesalers.

Commercial practices

Sales are on the basis of samples and visits. Payment for imports is commonly by letter of credit. Imports from developing countries usually carry the importer's or wholesaler's brand.

Market opportunities

The French market for terry towelling is expected to continue to grow. Sources of supply have been diversifying in recent years, new exporters from African and Asian developing countries (Pakistan, India, Sri Lanka, Egypt, etc.), are sharing the market with traditional European suppliers. As the market is highly price competitive, new exporters should offer attractive prices related to quality products. They must also have appealing designs and ensure quality control and regular delivery.

Toilet and kitchen linen of terry towelling - United Kingdom

Trade

| V: ECU '000 | 1990 | | 1991 | | 1992 | |
|----------------|---------|--------|---------|--------|---------|--------|
| Q: metric tons | V | Q | V | Q | V | Q |
| Imports | 109,194 | 15,371 | 103,609 | 15,449 | 104,617 | 16,390 |
| Exports | 9,783 | 1,044 | 13,662 | 1,437 | 14,471 | 1,497 |

Source: Eurostat.

Main origin of imports

The principal supplying countries to the United Kingdom in 1992 were (in % of total imports value): Portugal (41), Ireland (11), Turkey (8), India (7), Israel (6), China (4), Pakistan (4). Other suppliers among developing countries: Sri Lanka, Egypt and Bangladesh.

Market characteristics

The United Kingdom was the third largest EC importer in 1992, accounting for approximately 17% of total imports (in terms of value). Among household linen, towels are the most in demand. The market favors solid-color towels and printed designs. Handloom towels are imported in large quantities, various colors and designs reflecting changing consumer's taste.

The most common towel sizes are the following:

- ◆ Bath towels: 27 x 54 inches or 68 x 135 cm
- ◆ Bath sheets: 40 x 60 inches or 100 x 150 cm

Distribution channels

Imports come through specialized importers, specialized agents or through major retailers or buying groups. The role of specialized importers is increasing in the sector. Some of them have retail packing facilities. They are also closely involved in adapting products to the British market. The main outlets for terry towelling items are independent retailers, department stores, retail chains, mail-order firms and linen hire services. The largest outlets import direct or through agents or specialized importers.

Commercial practices

Importers usually visit manufacturers or attend major trade fairs to meet future partners. Sales are on the basis of samples. Orders of imported goods are usually substantial, averaging UK£ 10,000 - UK£ 20,000.

Market opportunities

During the period under review, imports of terry towelling items in the United Kingdom steadily increased in terms of quantity but slightly decreased in terms of value.

Some developing countries (India, Sri Lanka) increased their exports to the United Kingdom during the period under review. Importers are interested in new sources of supply offering low prices and good quality. The market is highly price conscious. New exporters wishing to enter the British market should adhere to delivery schedules and quality requirements.

List of importers

(non-exhaustive)

Germany

Firma Artipresent/Fritz
Pfizenmaier und Co.
Rohr Str. 140
7022 Leinfelden
Tel: (49 711) 799880
Fax: (49 711) 7998899

Dierig GmbH
Kirchberg Str. 23
8900 Augsburg
Tel: (49 821) 52101
Fax: (49 821) 526125

Erbelle GmbH
Postfach 1540
8520 Erlangen
Tel: (49 9131) 8280
Fax: (49 9131) 828376

Kurt Wermuth GmbH
Zirgesheimer Str. 31 A
Postfach 1428
8850 Donauwörth
Tel: (49 906) 3075
Fax: (49 906) 23 341

Gustav Winkler GmbH
Heinrich-Rieger Str. 14
7080 Aalen
Tel: (49 7361) 57180
Fax: (49 7361) 6553

Gerken Import+Export
Postfach 330248
2800 Bremen 33
Tel: (49 421) 27945
Tlx: 245860

Hadeka Handelszentrale GmbH
AM Kronberger Hang
6231 Schwalbach
Tel: (49 6196) 8021

Helia Import-U. Export GmbH
50, Martinistrasse
2800 Bremen 1
Tel: (49 421)310954
Tlx: 244271

Tib Pauer & Co. GmbH
Postfach 100903
2800 Bremen 1
Tel: (49 421) 518020

France

Bellaïche (Ets Roger)
10, rue de Cléry
75002 Paris
Tel: (33 1) 42339411
Fax: (33 1) 42335528

Bernheim et Fils
33, rue des Jeûneurs
75002 Paris
Tel: (33 1) 42334595

Textiles Inter
28, rue des Fillettes
93300 Aubervilliers
Tel: (33 1) 48349204

Société Cotonaine
131, bd de Sébastopol
75002 Paris
Tel: (33 1) 42339096

Société M.C. Diffusion
27, rue Topincourt
75010 Paris
Tel: (33 1) 48054410
Tlx: 216707
Toulemend Bochard
5, rue Lacueé
75012 Paris
Tel: (33 1) 434117240
Tlx: 210886

Groupement Textile Hôtelier
9, rue Rigord
13007 Marseille
Tel: (33) 91333341
Tlx: 400859 groutex f
Alpax
142, av. Gabriel Peri
93400 Saint Ouen
Tel: (33 1) 40112150
Fax: (33 1) 40110655

Andre Berdah
11, rue de l'Hippodrome
92150 Suresnes
Tel: (33 1) 47287556
Tlx: 250303 f

Eurolys S.A.
92, rue Gabriel Peri
59250 Halluin
Tel: (33) 20337800
Tlx: 132501 f

Literie Nouvelle S.A.R.L.
23, Avenue de Toulouse
31240 L'Union
Tel: (33) 61743212
Tlx: 530955 f

Orientrader
19, rue Bergere
75009 Paris
Tel: (33 1) 48245506
Fax: (33 1) 47700946

United Kingdom

Afco Agencies
95-111, Bayham Street
London NW1 OA6
Tel: (44 71) 4850884
Tlx: 28547 afco ag

Alami Import and Export Ltd
Hopeglade House
10-23 Kingsland Road
London E2 8AA
Tel: (44 71) 7295501
Tlx: (893903 alami g

Kingsley and Forester Ltd
Knowsley House
32, Knowsley Street
Cheetham
Manchester M8 8HZ
Tel: (44 61) 8339445
Tlx: 666580

Hunter and Smallpage Ltd
57, Goodramgate
York
Tel: (44 904) 25522

Christopher King and Co.
The Doughnut Studio
The Old Bakery
South Road
Reigate, Surrey RH2 7LB
Tel: (44 7372) 41761
Tlx: 944422

M. & N. Textiles Ltd
107, Portland Street
Manchester M1 6DF
Tel: (44 61) 2361252
Tlx: 667294 mandn

Cohen and Chapman Ltd
Vulcan Works
Pollard Street
Manchester M4 7AN
Tel: (44 61) 2434471
Tlx: chamcom 664822
prefixed "Cohen and Chapman"

L. Deyong and Co. Ltd
11-13, Clifton Terrace
Finsbury Park
London N4 3JR
Tel: (44 71) 2724486
Tlx: 27859 mabuse

Italy

Gamma Export Srl
16, Via San Vittore
20123 Milan
Tel: (39 2) 4986015
Fax: (39 2) 4986819

S.I.E.G. Srl
34, Via Constanza
20146 Milan
Tel: (39 2) 4813335
Fax: (39 2) 26861633

Fortex Srl
384-A, Via dei Colli
50050 San Mauro a Signa
Tel: (39 55) 432656
Fax: (39 55) 8997608

Simta S.p.A.
185, Corso Svizzera
10149 Turin
Tel: (39 11) 752626

Tarantola Alberto & C.Sas
9, P. San Pancrazio
16125 Genova
Tel: (39 10) 207440
Fax: (39 10) 296487

Vileda S.p.A.
38, Viale Monza
20127 Milan
Tel: (39 2) 28861
Fax: (39 2) 26111776

Netherlands

Acrovan-Cijfer
Scheepstimmermanslaan 15A
3016 AC Rotterdam
Tel: (31 10) 4366573
Fax: (31 10) 4508461

Westerweel BV
Lichterweg 2
8042 PW Zwolle
Tel: (31 38) 224780
Fax: (31 38) 225905

Maas Textiel BV/Dermatex, De
Polderdijk 10-16
3299 LN Maasdam
Tel: (31 1856) 1307
Fax: (31 1856) 2842

Blyco Textile Group BV
Oosterstraat 2
7514 DZ Enschede
Tel: (31 53) 877422
Fax: (31 53) 334808

Belgium

Casteleyn (Ets)
Pilkemstraat 37-39
8800 Roeselare
Tel: (32 51) 201202
Fax: (32 51) 241988

Sitem Sprl
36-38, avenue J. Dubrucq
1210 Brussels
Tel: (32 2) 4269970
Fax: (32 2) 4264656

Belena Bvba
570, H.F. Orbelaan
9000 Gent
Tel: (32 91) 230247
Fax: (32 91) 330920

Centretext SA
57-59, rue de la Senne
1000 Brussels
Tel: (32 2) 5123417
Tlx: 26827 centex b

Christex NV
Elfde Julistraat 132
8530 Harelbeke
Tel: (32 56) 714853
Fax: (32 56) 710497

Soubry Bvba
Konig Alberstraat 37
8520 Kuurne
Tel: (32 56) 714405

Department and chain stores/retail buying groups

Germany

Hertie Waren und Kaufhaus GmbH
Postfach 710461
6000 Frankfurt
Tel: (49 69) 66811
Fax: (49 69) 4121280

Kaufhof Holding AG
Leonhard Tietz Strasse 1
Postfach 101000
5000 Cologne
Tel: (49 221) 22301
Fax: (49 221) 2232800

Sütex-Textil-Verbund
Eschenbrünnle Str. 12-14
Postfach 460
7032 Sindelfingen
Tel: (49 7031) 61020
Fax: (49 7031) 6102266

Wertkauf GmbH
Durlacher Allee 109
Postfach 6869
7500 Karlsruhe
Tel: (49 721) 60960
Fax: (49 721) 6096625

France

Groupe Auchan
40, avenue de Flandres
59170 Croix
Tel: (33) 20816800
Fax: (33) 20816909

SAPAC Printemps
102, rue de Provence
75009 Paris
Tel: (33 1) 42825000
Fax: (33 1) 42825803

Groupe Euromarché
Cours d'Alsace
94150 Rungis Cédex
Tel: (33 1) 46872614
Fax: (33 1) 46872614

La Samaritaine
19, rue de la Monnaie
B.P. 139
75001 Paris
Tel: (33 1) 40412020
Fax: (33 1) 40412828

Galeries Lafayette
40, bd Haussmann
75446 Paris Cédex 09
Tel: (33 1) 42748212
Tlx: (33 1) 280357

GAGMI - Groupement d'achats des
grands magasins indépendants
(Buying group for department stores)
59, rue d'Amsterdam
75008 Paris
Tel: (33 1) 42806770
Tlx: 290940

United Kingdom

Debenhams PLC
1 Wellbeck
London W1A 1DF
Tel: (44 71) 4084444
Fax: (44 71) 6295434

House of Fraser PLC
1 Howick Place
London SW1 1BH
Tel: (44 71) 8341515
Fax: (44 71) 8288885

Littlewoods Organization Ltd
JM Centre
Old Hall Street
Liverpool L7O 1AB
Tel: (44 51) 2352222
Fax: (44 51) 2354900

F.W. Woolworth & Co. Ltd
Woolworth House
242-246 Marylebone Road
London NW1 6JL
Tel: (44 71) 2621222
Fax: (44 71) 7065416

Italy

Frette
Via Visconti di Modrone, 15
20122 Milan
Tel: (39 2) 784851
Fax: (39 2) 781466

Standa SpA
Strada 4 Palazzo Q1
Milanofiori
20089 Rozzano
Tel: (39 2) 892121
Fax: (39 2) 82475686

Oviesse
Via Terraglio, 17
30174 Mestre
Tel: (39 41) 981766
Fax: (39 41) 981315

La Rinascente SpA
Strada 8 Palazzo N
20089 Rozzano
Tel: (39 2) 57581
Fax: (39 2) 8242926

Netherlands

Kwantum Nederland BV
Belle van Zuylenstraat 10
5032 MA Tilburg
Tel: (31 13) 626626
Fax: (31 13) 637979

Cebeco-Handelsraad
Blaak 31
3011 GA Rotterdam
Tel: (31 10) 4544911
Fax: (31 10) 4113889

Belgium

Cintex International NV
Mechelsesteenweg 281-283
1800 Vilvoorde
Tel: (32 2) 2516386
Fax: (32 2) 2524161

Sanaco CV
Lange Lobroekstraat 142
2060 Antwerpen
Tel: (32 3) 2315346
Fax: (32 3) 2329335

Mail-order houses

Germany

Grossversandhaus Bader GmbH & Co.
Maximilian Str. 48
7530 Pforzheim 1
Tel: (49 7231) 3030
Fax: (49 7231) 303710

Neckermann Versand AG
Hanauerlandstr. 360-400
6000 Frankfurt
Tel: (49 69) 40401
Fax: (49 69) 419078

Grossversandhaus Quelle
Nürnberger Str. 91-95
8510 Fürth
Tel: (49 911) 7421
Tlx: 626851

France

La Redoute
57,rue de Blanchemaille
59081 Roubaix Cédex 02
Tel: (33) 20696000
Fax: (33) 20240337

Trois Suisses France
12, rue de la Centenaire
59170 Croix
Tel: (33) 20725960
Tlx: 130569

La Blanche Porte
2, rue de la Blanche Porte
59200 Tourcoing
Tel: (33) 20 263907
Fax: (33) 20701851

Quelle France SA
Centre d'affaires Mercure
445, bd Gambetta
Tel: (33) 20114800
Fax: (33) 20114810

United Kingdom

Littewoods Organization Ltd
JM Centre
Old Hall Street
Liverpool L7O 1AB
Tel: (44 51) 2352222
Fax: (44 51) 2354900

Great Universal Stores Ltd (GUS)
Universal House
251-256 Tottenham Court Road
London W1A 1BZ
Tel: (44 71) 6364080
Fax: (44 71) 6313641

Italy

Postal Market
Via Trieste
20068 S.Bovio di Peschiera Borromeo
Tel: (39 2) 75251
Fax: (39 2) 7532014

Vestro SpA
Via Roma,8
24040 Madone
Tel: (39 35) 991262
Fax: (39 35) 995515