



Textile and fashion sector in Catalonia

June de 2019

Sector snapshot

Textile and fashion sector in Catalonia : Sector snapshot

Catalonia Trade & Investment
Government of Catalonia



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Elaborated by

ACCIÓ Strategy and Competitive Intelligence Unit and Strategic Analysis Area, General Direction of Industry

Barcelona, June 2019



1. The textile and fashion sector globally



2. The textile and fashion sector in Catalonia



3. Opportunities in the textile and fashion sector

1. The textile and fashion sector globally



1. Delimitation of the textile and fashion sector
2. The textile and fashion sector globally

Delimitation of the fashion and textile sector

CLOTHING TEXTILES



FOOTWEAR AND LEATHER FASHION ACCESSORIES



OTHER FASHION ACCESSORIES

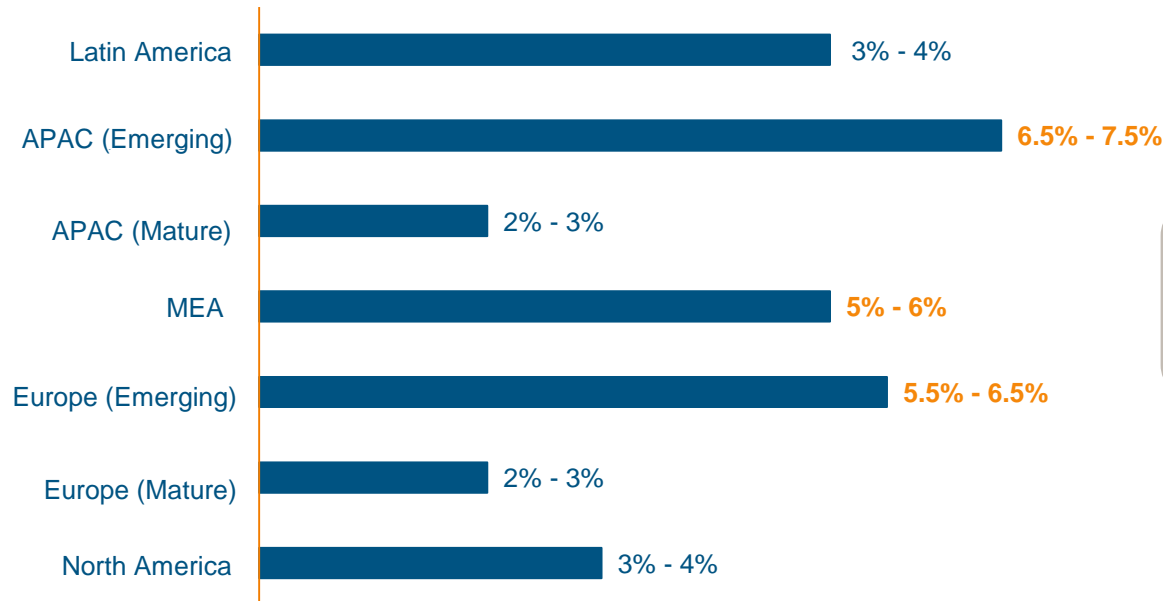


Source: "The Catalan fashion sector" Department of Strategic Analysis, Directorate-General of Industry

The textile and fashion sector globally

- The total value of the global fashion industry is \$ 2,500 billion
- A growth in sales is forecasted in 2019 between 3.5% and 4.5%, distributed as follows:

Growth in sales, 2019



China is expected to outstrip the United States in 2019 as the largest fashion market in the world

APAC: Asia- Pacific
MEA: Middle East and Africa

Source: "The Catalan fashion sector" Department of Strategic Analysis, Directorate-General of Industry

2. The textile and fashion sector in Catalonia



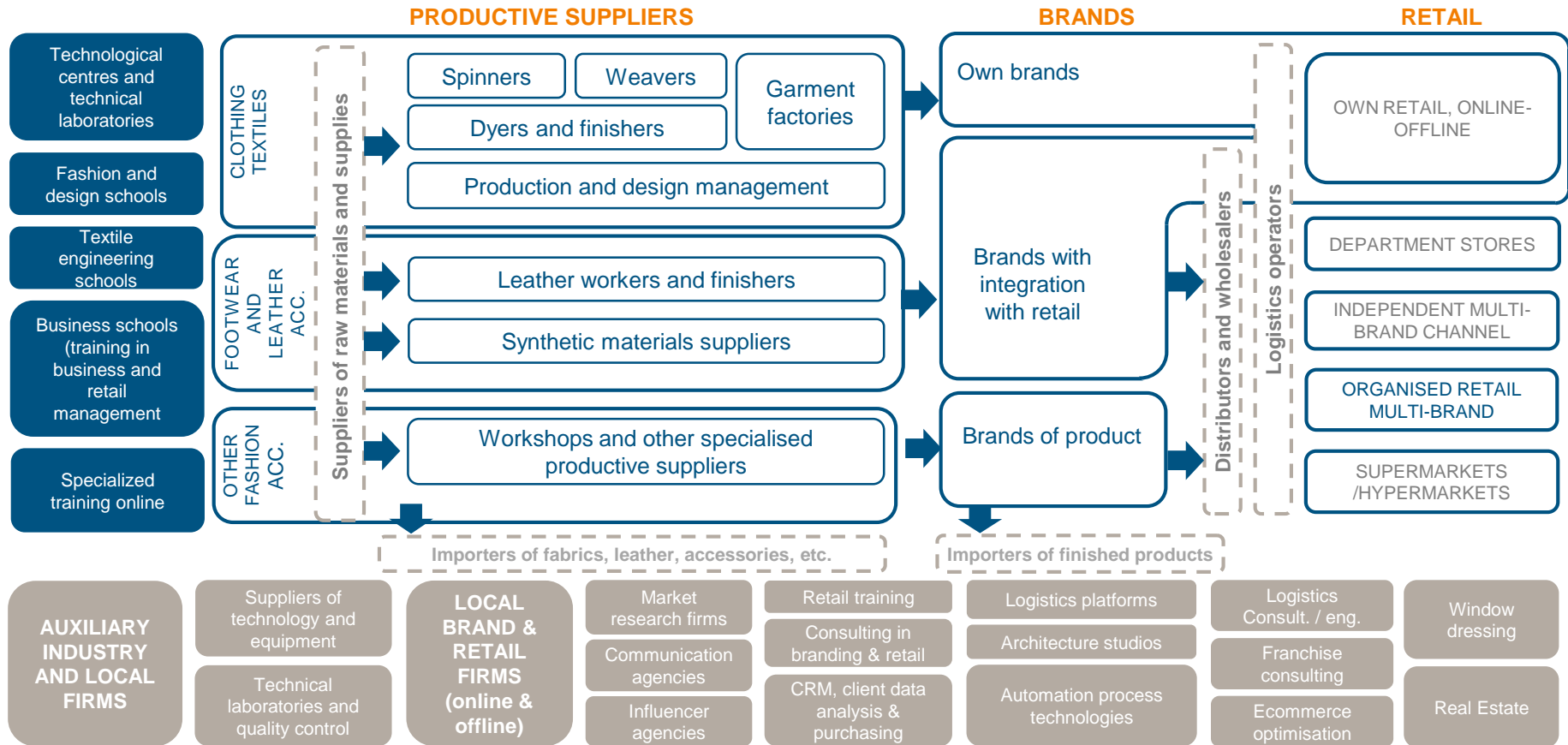
1. Textile and fashion sector value chain in Catalonia
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Textile and fashion sector value chain in Catalonia

PUBLIC ADMINISTRATIONS: Government of Catalonia (Department of Business and Employment, ACCIÓ, Department of Culture), Local Councils, Provincial Councils, Government of Spain (Ministry of Industry, Energy and Tourism),

Associations: Sabadell Guild of Manufacturers, FAGEPI, *Mataro* Town and County Knitwear Business Association, Textile Trade Guild; FEDECON, AEGP, Texfor, CIE, ACME,

Clusters: Modacc



Source: "The Catalan fashion sector" Department of Strategic Analysis, Directorate-General of Industry

Textile and fashion sector value chain in Catalonia

PRODUCTIVE SUPPLIERS

CLOTHING TEXTILES

Spinners

Weavers

Dyers and finishes

Garmet factories

Production and design management

FOOTWEAR AND LEATHER ACC.

Leather workers and finishers

Source: "The Catalan fashion sector" Department of Strategic Analysis, Directorate-General of Industry

Textile and fashion sector value chain in Catalonia

BRANDS

RETAIL

CLOTHING TEXTILES

Own brand

MANGO CALZEDONIA nekane UTERQÜE
 celio* NKN
 Bershka pimkie PUNT ROMA Yamamay
 Massimo Dutti OYSHO COMPTOIR DES COTONNIERS MACSON MORGAN TEXTURA
 Stradivarius okaidi BROWNIE MS mode

Retailer with brand

LAPERLA TISSOT Prenatal FUREST
 kaotiko señor SANTA EULALIA BARCELONA 1843 limo bebe
 CIVIT Menkes Dr Bloom

Brand and design management

GRIP GALCERAN KIDILIZ GROUP
 arctex CAMDEN

Brands with integration with retail

Pepe Jeans LONDON GUESS GUCCI PRONOVIAS BARCELONA YVES SAINT LAURENT BASI MaxMara bobon
 VI Levi's ORCHESTRA comdor DIESEL CUSTO ESCADA Punto Blanco ese 0 ese loupigee BURBERRY LONDON ENGLAND ROSA CLARA

Retailer

NR NURIA ROIG unipreus COSO Miraglio
 VIDAL GROUT grup Mora Bel y Cia +DCONTI
 Jofré Golf'us FEMAMODAS
 mariona CALPU EDO TEXTIL JEAN PIERRE BUA SERGENT MAJOR

CLIMA SINCE 1959 lovestore
 ISMA cwf

Brands of product

Janira PROMINENT GUSTO amsa avet set VANITY FAIR TROVELS RONCATO MASSANA DITEXMED
 castelltort BORIS BIDJAN SABERI KUFNER esratex commercial LISE CHARMELE RED POINT
 Denier, s.l. hunkemöller L'ASSERRE TURBO paz torras

Etailer

24 KILATES Barcelona / Bangkok COLONIAL FELGAR
 privalia parte de Veepee La Redoute ANONYME
 SITGETANA Ofertix.com

KARACTERMANIA
 BONE SL
 MVDNESS MUNDI UNION

FOOTWEAR AND LEATHER ACC.

LOUIS VUITTON BOSANOVA GEOX RESPIRA Dcm argentonata DEICHMANN TASCÓN BOTTEGA VENETA
 Castaner merkal calzados quetrol MUNICH SA KO FURLA SINCE 1927 ITALY IKKS Toni Pons carter mallorcani dayaday CASAS TUS ZAPATOS HABLAN DE TI

Brand and retail

MARLOS VIVES

JEWELRY

STOUS TOMAS COLOMER JOYERS DESDE 1976 PereQuera 1887 Chopard AGATHA PARIS MAREA PATEK PHILIPPE GENEVE
 CITIZEN Fina Garcia Joyas & Relojes desde 1988 Thomas Sabo beeline group uniõnsuiza ORO VIVO SWAROVSKI for JOYERS, S.A.

Brand and retail

Source: "The Catalan fashion sector" Department of Strategic Analysis, Directorate-General of Industry

Main figures on the Catalan textile and fashion sector



793 companies categorized

- 57%** Brands and retail
- 43%** Productive supplier system



€14,507 M

- 84%** Brands and retail
- 16%** Productive supplier system



64,519 workers

- 87%** Brands and retail
- 13%** Productive supplier system

Companies performing productive activities represent over 40% of the companies analysed but their average size is much smaller, contributing in total to less than 20% of the total aggregate turnover.

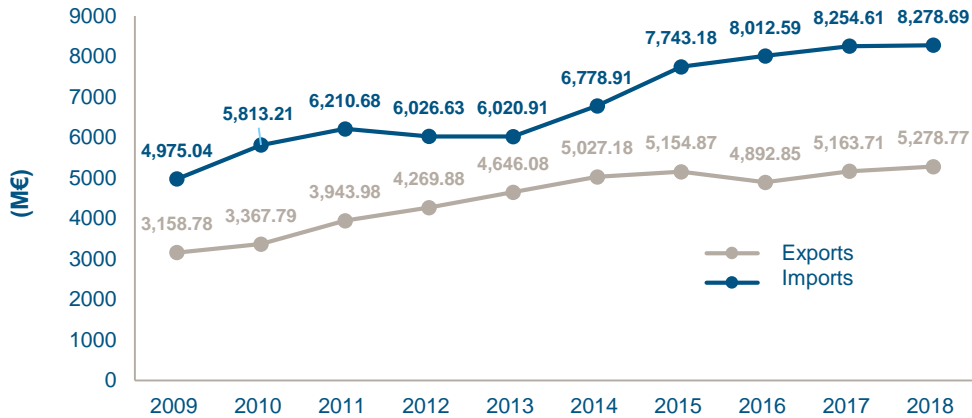
More than 30 companies are identified in what we call a new environment in the Catalan fashion industry, "Fashion Tech". Most of these companies are part of the start-up system in Catalonia. They are assets with which to work in developing technology in the fashion business in Catalonia

Source: "The Catalan fashion sector" Department of Strategic Analysis, Directorate-General of Industry

Catalonia is an open trading economy



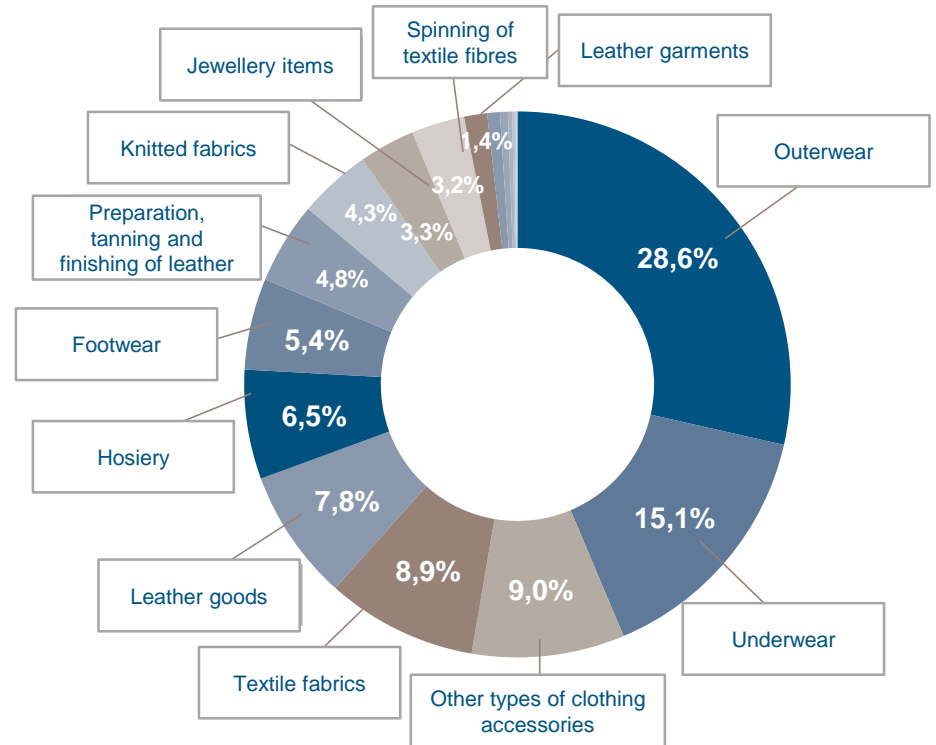
Exports and imports in the textile and fashion sector in Catalonia (2009-2018)



- Over the last decade **30%** of exports from **Spain in textile and fashion have come from Catalonia.**
- Furthermore, **6.6%** of total **Catalan exports are from the textile and fashion sector.**
- Catalonia's main commercial partners are France, Italy, and Portugal in terms of exports and China, Bangladesh and Turkey as regards imports.
- There were **2,034 regular exporting companies in 2018**, 35% of the total exporting companies in Catalonia.



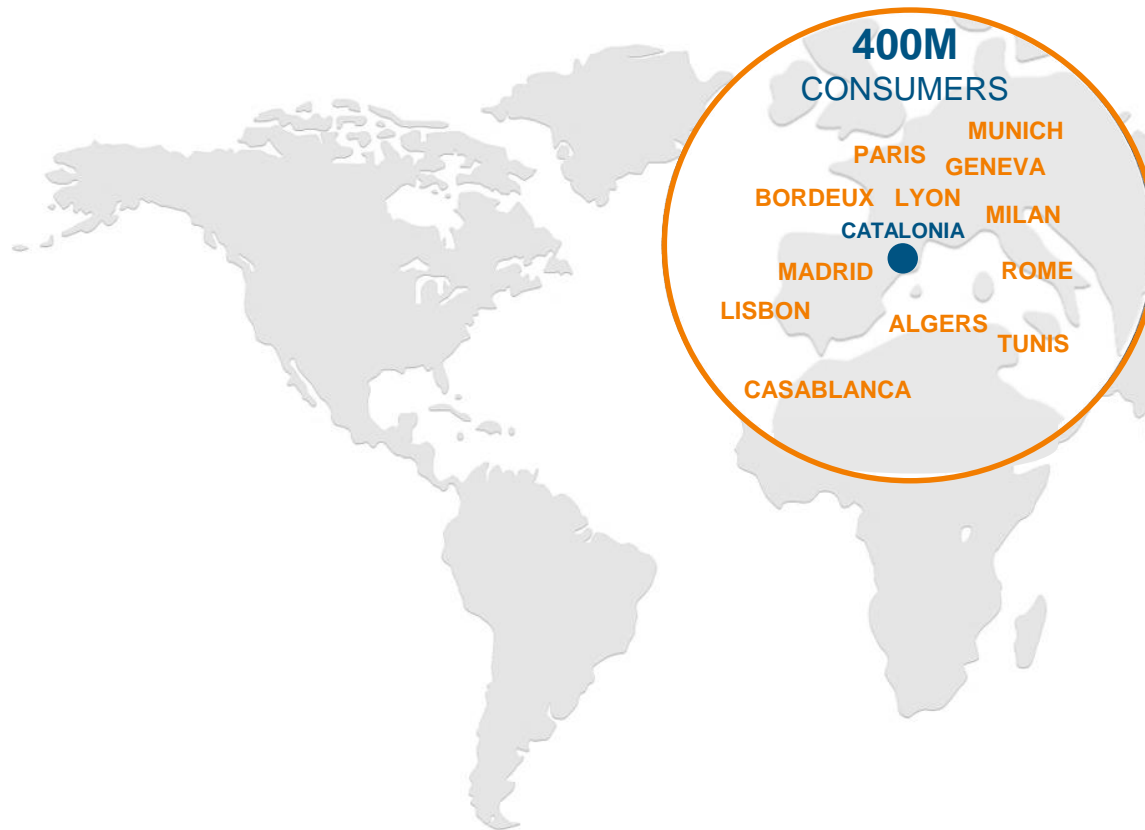
Catalan exports in textile and fashion, by subgroups (2014-2018)



- Exports in **Outerwear** is the **most exported subgroup** in the textile and fashion sector, representing **28.6%** of total Catalan exports in the sector.

An Unbeatable distribution capacity

- Catalonia's excellent geostrategic position allows for efficient intercontinental connections to Asia and the Americas and easy fast distribution to Southern Europe and North Africa. The logistics network can reach **400M consumers** in Europe and the Mediterranean/Africa in less than **48 hours***.



Multisector Logistic Operators (LO)

Logistics specializations

Textile Logistic Operators



E-commerce Logistic Operators



Source: EIC (DGI – ACCIÓ)

FDI in the Catalan textile and fashion sector

Between 2014 and 2018, the textile and fashion sector in Catalonia produced:

-  **35** FDI projects
-  **156,34 M€** in capital investment
-  **1,561** jobs

During that period **Catalonia** was the main FDI recipient in this sector in all Spain, and was responsible for:

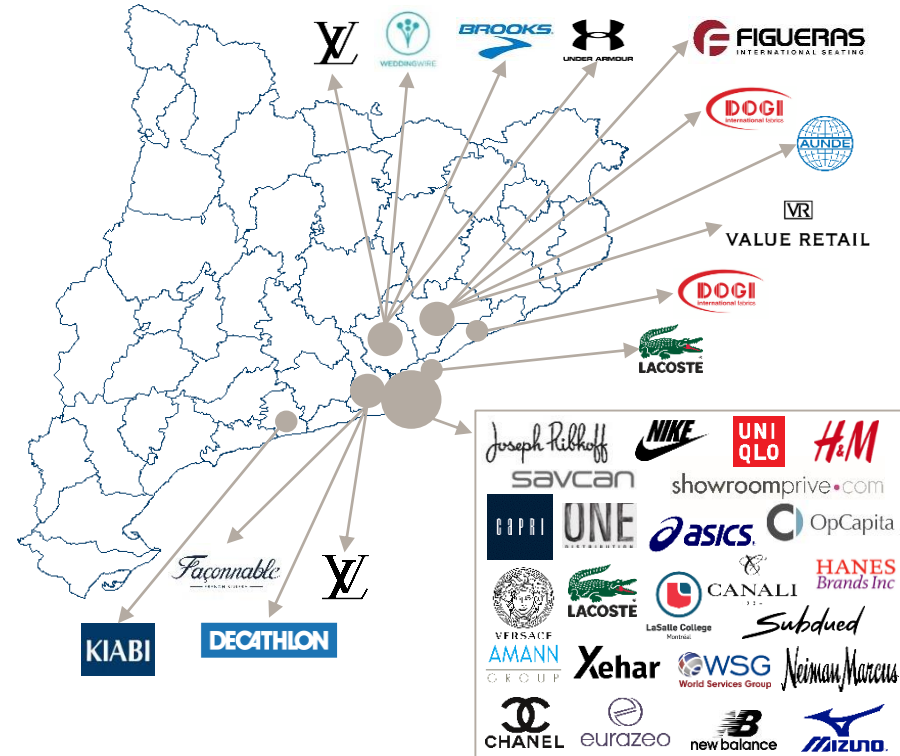
- 53.0%** of incoming FDI projects
- 32.3%** of capital investment
- 42.7%** jobs

1st region in western Europe in FDI projects received rebuts.

2nd in western Europe in jobs created

6th in western Europe in capital investment.

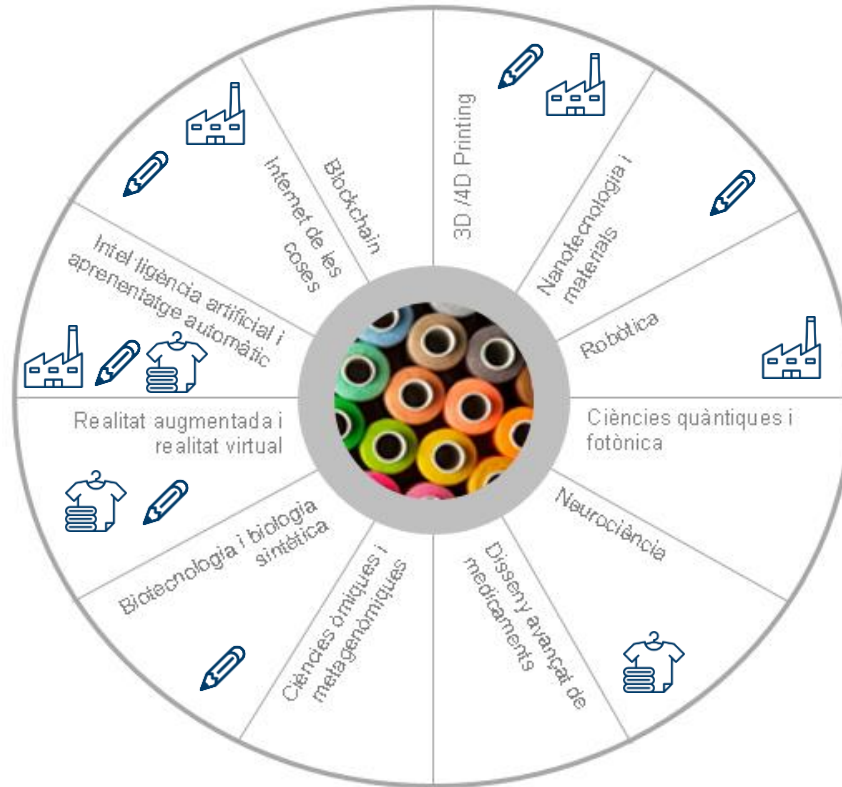
Most FDI projects received between 2014 and 2018 affected the Barcelona metropolitan area.



Source: fDi Markets 2014-2018.

Note: Companies that invested in Catalonia between 2014 and 2018.

Technological applications in the textile and fashion sector



How to apply 'Diana tecnològica' technologies in the textile and fashion sector.

- Characteristics and design of products 
- Production processes 
- Sales and client/user knowledge 

Technological centres with specialisation in the textile and fashion sector

TECNIO



Altres



* *Diana tecnològica*: Study of EIC (DGI - ACCIÓ) with the collection of the main technological tendencies 2018

Source: EIC (DGI - ACCIÓ)

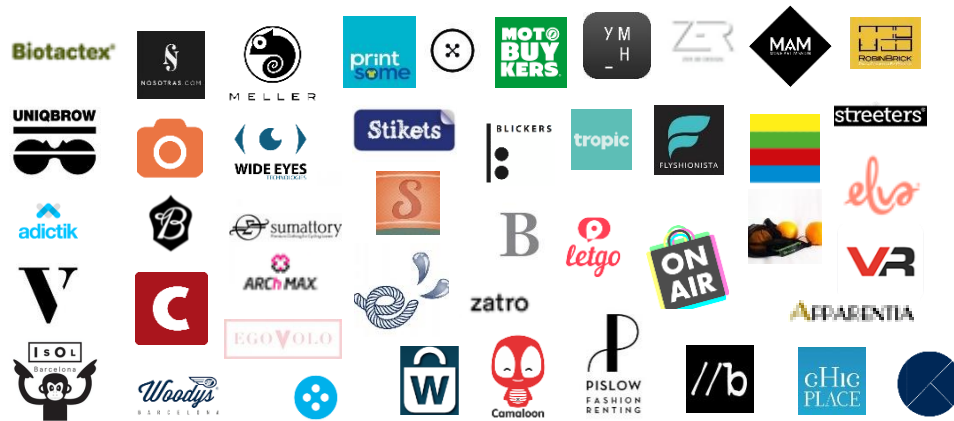
The Catalan entrepreneurship ecosystem

International companies in the Textile and Fashion sector are choosing Catalonia and Barcelona to **promote their innovation strategies** due to the potential of the design, fashion and entrepreneurship ecosystem.

There are more than 70 startups related to the fashion and design sector in Catalonia.

Startupshub, 2018

In the map of Catalan startups we find designers, producers and sellers of their own products. We also find a group at the end of the value chain featuring, for example: multi-brand online shops, companies supporting the process of selling products, marketing specialised in the textile and fashion sector.



A success story innovating through startups

ASICS has chosen Barcelona as its base for launching its innovation projects in Europe, Africa and the Middle East.

The new **Barcelona Innovation Hub** helps the growth of other companies with great ideas, taking them to another level by giving them access to areas of knowledge, strategic tips, distribution channels and global networks. It is also an important step for ASICS, allowing the company to continue leading the industry and technological innovation.

asics | Tenkan.Ten

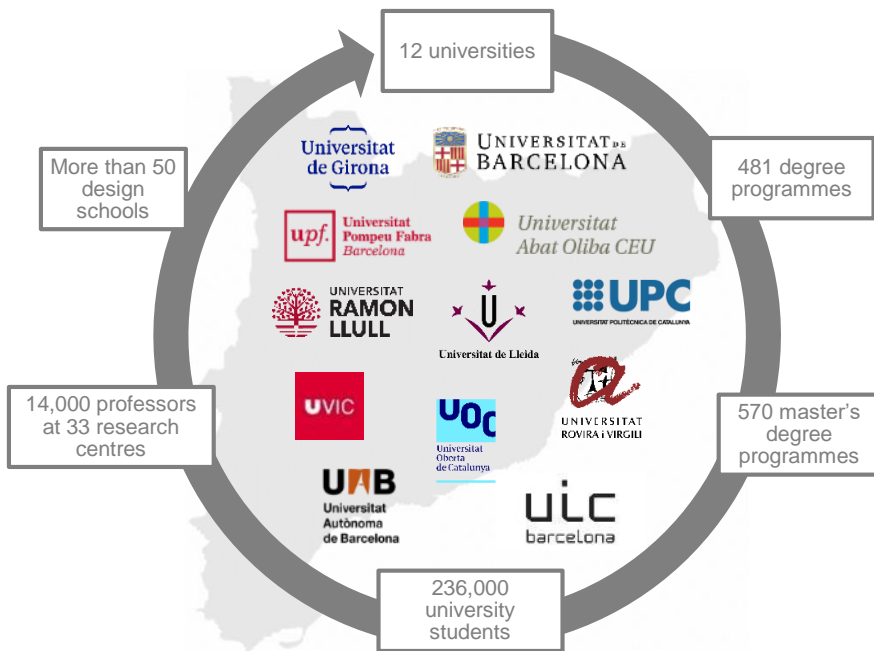


Source: EIC (DGI – ACCIÓ) Startup hub. ASICS Tenkan Ten

Talent and Creativity in Catalonia

The talent and creativity of the textile and fashion industries are vital to making the textile machinery industry more competitive.

Catalonia's dynamic university ecosystem:



First-class centres for studying business and management:



Some of the institutions that offer specialist programmes in textiles and fashion:



Events and awards related to textiles and fashion in Catalonia:



Design-oriented centres, institutions and initiatives:



3. Opportunities in the textile and fashion sector



1. Internationalisation opportunities
2. Technological and business opportunities in Catalonia

International opportunities for Catalan companies



Source: Global map of internationalization, 2019 *EIC (DGI-ACCIÓ)*

Technological and business opportunities in Catalonia



Wearables

The importance of the IoT for the textile and fashion industry is in the **real time control** and variables, as well as in the predictability and in its **impact on product innovation**. At present, this technology is found in the fashion business in **wearable products** that provide more added value to traditional products.



Logistics / e-commerce

In the textile and fashion sector, a lot of production is located far from the points of sale and increasingly **online sales** are becoming the most significant marketing channel. In this environment, logistics are of special importance and opportunities arise for companies both in the improvement of both delivery times and costs.



Favourable ecosystem for design, fashion and entrepreneurship.

International textile and fashion companies are choosing Catalonia and Barcelona to promote their innovation strategies due to the potential of the design, fashion and entrepreneurship ecosystem.



Sustainability/ Circular economy

The **circular economy** is a cross industry trend and with potential to be applied in many sectors, the textile and fashion sector being one of them. Challenges and opportunities appear in the area of sustainability related to product life cycle.



Production technologies

3D printing technology can be applied to the manufacture of textiles and fashion. The characteristics of this technology such as **flexibility** and **customization**, reduction of **time to market** and **proximity manufacturing**, are optimal for both standard products and customized products.

Companies in the textile and fashion sector are committing themselves to new forms of production that adapt to consumer demand of personalized products. The technique of sublimation must allow for short runs at competitive prices.

Source: EIC (DGI – ACCIÓ)

ACCIÓ

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Take a look at the full report:

<http://catalonia.com/.content/documents/textile-fashion-in-catalonia.pdf>

More information about the sector and related news:

<http://catalonia.com/trade-with-catalonia/textile-fashion.jsp>

