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**

  - Latin America: 3% - 4%
  - APAC (Emerging): 6.5% - 7.5%
  - APAC (Mature): 2% - 3%
  - MEA: 5% - 6%
  - Europe (Emerging): 5.5% - 6.5%
  - Europe (Mature): 2% - 3%
  - North America: 3% - 4%

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**Source:** “The Catalan fashion sector” Department of Strategic Analysis, Directorate-General of Industry

**APAC:** Asia-Pacific

**MEA:** Middle East and Africa

China is expected to outstrip the United States in 2019 as the largest fashion market in the world.
2. The textile and fashion sector in Catalonia

1. Textile and fashion sector value chain in Catalonia
2. Main figures on the textile and fashion sector in Catalonia
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4. An unbeatable distribution capacity
5. FDI in the Catalan textile and fashion sector
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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
- Garment factories

**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

- CLOTHING TEXTILES
  - Mango
  - Bershka
  - Zara
  - Massimo Dutti
  - Stradivarius
  - MANGO
  - ALFRED DE HUMBERT

- FOOTWEAR AND LEATHER ACC.
  - Louis Vuitton
  - Bosanova
  - GEOX RESPIRA
  - Geox
  - Furla

- JEWELRY
  - Citizen
  - Fossil
  - Tomas Colomer

Own brand

- Yamandy

Retail

- LAPERA
  - Dep&aacute;rt<br>
  - Santa Eulalia
  - Barcelona 843

- NURIA ROIG
  - Coso

- BRANDS WITH INTEGRATION WITH RETAIL
  - Elle
  - Own brand

Brands with design

- Prominent
- Pronovias
- Pronovias

Brands of product

- DITEXMED
- Avena
- Set

Etailer

- Privapia
- La Redoute
- Intime

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.

Note: Regular exporters are those companies that have been exporting for the last consecutive four years.

Source: ICEX, the 2018 figures are provisional.
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.

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.


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

* 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.

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.

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:

- **12 universities**
- **481 degree programmes**
- **570 master’s degree programmes**
- **236,000 university students**
- **14,000 professors at 33 research centres**
- **More than 50 design schools**

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

- **ESDAP**
- **ELISAVA**
- **IED Barcelona**
- **Ramón Llull University**
- **UPC**
- **Universitat Autònoma de Barcelona**

Events and awards related to textiles and fashion in Catalonia:

- **080 Barcelona Fashion**
- **Bridal Fashion Week**
- **Barcelona Fashion**
- **TecnoCampus Mataró**
- **Elle**
- **Eva Magazine**

Design-oriented centres, institutions and initiatives:

- **BCD**
- **Desayu Hub Barcelona**
- **fadfest**

Source: The Catalan Ministry of Education and the Catalan Ministry of Business and Knowledge; barcelona.cat; Barcelona Bridal Fashion Week; TecnoCampus Mataró; Elle magazine.
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)
Take a look at the full report:

More information about the sector and related news:
http://catalonia.com/trade-with-catalonia/textile-fashion.jsp