

Exporting table linen of natural fibres to Europe

The European market for natural fibre table linen is fairly stable. Most imports originate from developing countries, which offers you interesting opportunities. The middle and high-end market segments have the most potential. To supply these segments you need to pay particular attention to design and quality. Working with sustainable materials and co-creation can give you a competitive edge.

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1. Product description

The term linen is used to describe any woven or knitted bath, bed, kitchen or table textiles. In this context, it does not specifically refer to the fabric linen.

Table linen includes tablecloths, table runners, tablemats, placemats and napkins. Table linen can be sold individually or in matching sets. Combinations of table and kitchen linen in sets are also available. Some suppliers even coordinate table linen with items like ready-made curtains for the dining room and/or matching cushion covers.

This study uses the following codes to indicate trade in natural fibre table linen:

Table 1: Product codes

| Harmonised System (HS) | Prodcom | Description |
|------------------------|-------------|--------------------------------------------------------------------|
| 6302 51 | 13 92 13 53 | Table linen of cotton |
| 6302 59 10 | 13 92 13 55 | Table linen of flax |
| 6302 59 90 | | Table linen of other textile materials (excluding man-made fibres) |

Tip:

For more information about kitchen linen, see our study on [kitchen linen of natural fibres](#).

Quality

Functionality

Table linen has different functions, both protective and decorative. It is used to protect the table against stains, and as part of the decoration of the dining room. This makes it a relatively inexpensive way to change the look of the dining room.

Material

Most table linen is woven. The fabric of table linen should be washable at fairly hot temperatures (60–90°C) to remove stains, without shrinking or fading. Natural fibre table linen consists of cotton, linen, bamboo, hemp or banana fibre. It can also be made of blended yarns or mixed fabrics. However, by far the largest part of European imports consists of products made of cotton. The texture (from soft to rough) and finishing are key quality aspects of natural fibre table linen.

Size

Sizes for table linen vary widely depending on the type of product. Common standard sizes in cm are as follows.

- placemats: 30x45, 35x50 or 45x35
- runners: 35x130, 35x90, 45x150, 50x160
- napkins: 40x40, 45x45, 50x50
- tablecloths and covers: 90x90, 100x100, 120x120, 150x150, 150x225, 150x250, 150x300

Other sizes are also available, depending on the target country. Ask your European buyer what specific sizes they may be looking for in the early stages of collaboration.

Tablecloths can also be round (ø 100–150 cm), but this may result in a lot of waste in production.

Design

Table linen is available in a wide variety of designs and colours. Different patterns can be woven into or printed on it. Tablecloths can be made out of single pieces of fabric or designed with borders.

There is a range of possibilities when it comes to possible accessories and embellishments, varying from laces and tapes at the borders, to embroidery and tassels at the corners. In the high-end segment designs tend to be simple and sophisticated, deriving their value from the high quality of the material and the overall finish.

Some producers coordinate their range of table linen with their kitchen linen designs, to provide a consistent decorative style for the kitchen and dining room.

Labelling

External packaging labels for table linen should include the producer, consignee, composition, size, number of pieces, box identification, total number of boxes, and net and gross weight.

The most important information on the product or packing labels of table linen is composition, size, origin and care labelling. For more information, refer to the chapter on buyer requirements.

Packaging

You should pack table linen according to the importer's instructions. Packaging usually consists of plastic wrapping to protect the fabric from water, solar radiation and staining. It should be easily manageable in terms of size and weight and ideally, fit together on (Euro) pallets. When in doubt, check the dimensions with your buyer.

Natural fibre table linen is usually displayed unpacked, making attractive consumer packaging less important. High-end table covers and sets are an exception. In general, consumer packaging needs to protect against stains but can be simple in design. However, in the mid-high or high-end segments you should provide consumer packaging matching the design, quality and price of the product.

Gift sets should be attractively packed. For example 2 placemats, 2 napkins, napkin rings and a table runner, all packed in an attractive box.

2. Which European markets offer opportunities for exporters of natural fibre table linen?

European imports of natural fibre table linen are fairly stable, with developing countries as the leading suppliers. Europe's main importers of natural fibre table linen are Germany, France and Italy. The strong imports from developing countries make Germany, Italy and the United Kingdom especially interesting focus countries.

(!) The European production and consumption statistics cover table linen made of cotton or flax, because these data do not distinguish any further between natural and synthetic fibres.

Where is consumer demand?

- European demand for cotton or flax table linen decreased between 2012 and 2016. With an average annual growth rate of -3.2% , it fell to €225 million in 2016.
- European demand for cotton or flax table linen is highest in France at €49 million. Italy and Germany follow with €38 million each.

What is the role of European production in supplying European demand?

- Europe's demand for cotton or flax table linen is considerably higher than its production. This drives the need for imports, making Europe an interesting market.
- European production of cotton or flax table linen decreased between 2012 and 2016. With an average annual growth rate of -3.0% , it fell to €156 million in 2016.
- Italy is responsible for 23% of European cotton or flax table linen production. France and Portugal follow with 18% and 12% respectively.

3. Which countries are most interesting in terms of imports from developing countries?

- European imports of natural fibre table linen were relatively stable at around €270 million between 2012 and 2016.
- In the coming years, European imports are expected to stay around this level.
- Developing countries are Europe's main source of natural fibre table linen imports. They supply 58%, amounting to €154 million. This share is also predicted to remain fairly stable in the coming years.
- In reality, much of the table linen imported from western European countries concerns re-exported products manufactured in developing countries.
- Germany is Europe's leading importer of natural fibre table linen by far, at €57 million in 2016. France (€41 million) and Italy (€35 million) follow.
- Germany is also leads in imports from developing countries. It sources 74% of its imports from developing countries.
- Italy and the United Kingdom also have particularly strong markets for developing country imports, accounting for 68–91% of their total natural fibre table linen imports!
- The strong performance of developing country suppliers in Italy and the United Kingdom is evidenced further by strong increases between 2012 and 2016. These countries increased their imports from developing countries by €8.3 million and €4.7 million respectively.

- India dominates European table linen imports, with 29% in 2016. Other leading developing country suppliers are China (8.7%), Turkey (6.2%), Egypt (3.8%), Pakistan (3.3%) and Tunisia (2.5%).

Tips:

Study your options in Germany, Italy and the United Kingdom. Their strong imports from developing countries make them especially interesting markets.

The upcoming [Brexit](#) (Great Britain leaving the European Union) has decreased the value of the British pound. As a result more British buyers have started importing directly from developing countries, rather than buying from European importers. However, as the situation is still fluid and insecure, you should keep a close watch on developments.

Compare your products and company to the strong competition from India, as well as from China, Turkey, Egypt, Pakistan and Tunisia. You can use [ITC Trademap](#) to find exporters per country. You can compare on market segment, price, quality and target countries.

What role does export play in supplying European demand?

- European exports of natural fibre table linen mainly concern trade within Europe.
- Italy and Germany are Europe's leading natural fibre blanket and throw exporters at €32 million each. France follows at €27 million.

What is the effect of real private consumption expenditure on European demand?

- Private consumption expenditure is an important indicator for the European home decoration market. The sector is closely linked to economic conditions. When money is tight, consumers postpone buying non-essential items until they have enough disposable income.
- Between 2017 and 2019, European private consumption expenditure is expected to increase. This means that consumption of decorative products is likely to rise. Especially in emerging markets, consumers will have more money available to spend on decorating the home. Consumers in mature markets already spend a fair amount of money on decoration, so growth in their consumption will be moderate.

4. What trends offer opportunities on the European market for natural fibre table linen?

Sustainable materials

In Europe there is a growing group of conscious consumers. This is encouraging producers of table linen to use sustainable raw materials and techniques, like organic cotton, linen (made from flax), bamboo, hemp, banana fibre and eco-friendly or more eco-friendly dyes. However, using sustainably produced natural fibres is only one aspect. Decreasing or eliminating the chemicals used in turning the fibre into yarn is just as important.

Tips:

Consider using sustainable materials for your table linen, especially when you target the higher segments.

For more information, see our special study on [sustainability](#).

Co-creation

European buyers are increasingly trying to distinguish themselves from their competitors. To do so, they focus on their own image and design. They look for producers they can cooperate with to develop their own products, which is referred to as “co-creation”. This makes it extra important to showcase your special skills, production techniques and the variety of raw materials you work with.

Tips:

Make sure your collection showcases the different materials and production techniques you have to offer.

Emphasise the story behind your product in your promotion strategy.

Smaller quantities and shorter lead times

European buyers change their collection increasingly quickly, so they are looking for shorter lead times and lower minimum orders. This is a distinct advantage for small to medium sized producers who are more flexible and can generally supply smaller quantities than bigger producers.

Tip:

If you are flexible in production and can supply smaller quantities, emphasise this in your promotion.

For more information, see our study about [trends for Home Decoration & Home Textiles](#).

5. With which requirements must natural fibre table linen comply to be allowed on the European market?

With which legal and non-legal requirements must your product comply?

General product safety

The European Union’s [General Product Safety Directive](#) applies to all consumer products, including table linen. It states that all products marketed in Europe must be safe to use.

Tips:

Read more about the [General Product Safety Directive](#).

Use your common sense to ensure normal use of your product does not cause any danger.

The [RAPEX database](#) lists products that the European Union has rejected at the border or withdrawn from the market. Check the database for similar products for an idea of what issues may arise.

Restricted chemicals: REACH

The [REACH](#) regulation lists restricted chemicals in products that are marketed in Europe. For example, REACH restricts the use of azo dyes and certain flame retardants in textile products.

Tips:

The European Chemical Agency provides useful information and tips on REACH. See for instance [REACH Annex XVII](#) for a list of all restricted chemicals. Also check out the [Information on REACH for companies established outside Europe](#) and the [Questions & Answers on REACH](#).

Follow new developments in the field of flame retardants, as new alternatives are being developed. You can do so for instance through the [European Flame Retardants Association](#) (EFRA).

Textile Regulation

According to the European Union's [Textile Regulation](#), textile products should be labelled or marked to indicate their fibre composition. These labels should be durable and tear-resistant, securely attached, easily legible, visible and accessible.

Tip:

For more information, see the [Frequently Asked Questions about the Textile Regulation](#).

Packaging legislation

Europe has specific [packaging and packaging waste legislation](#). It for instance restricts the use of certain heavy metals. Europe also has [requirements for wood packaging materials](#) (WPM) used for transport, such as packing cases, boxes, crates, drums, (box) pallets and dunnage.

Tip:

Read more in the [overview of EU rules on wood packaging material](#).

What additional requirements do buyers often have?

Sustainability

Social and environmental sustainability make your products stand out on the European market. This could concern using sustainable raw materials and production processes. European buyers increasingly demand the following certification schemes.

- [Business Social Compliance Initiative \(BSCI\)](#): European retailers developed this initiative to improve social conditions in sourcing countries. They expect their suppliers to comply with the BSCI Code of Conduct. To prove compliance, the importer can request an audit of your production process. Once a company has been

audited, it is included in a database for all BSCI participants.

- [Ethical Trading Initiative \(ETI\)](#): This initiative is an alliance of companies, trade unions and voluntary organisations. It aims to improve the working lives of people across the globe who make or grow consumer goods.

You can use standards such as [ISO 14001](#) and [SA 8000](#) to read up on sustainable options. However, only niche market buyers demand compliance with such standards.

Tips:

Optimise your sustainability performance. Reading up on the issues included in the initiatives will give you an idea of what to focus on.

Buyers appreciate a good story. If you can show that you value your company's environmental and/or social performance, this may be a competitive advantage. Consider a self-assessment like the [BSCI Self-Assessment for Producers](#), or a code of conduct such as the [BSCI Code of Conduct](#) or the [ETI base code](#).

For more information, see our special study on [Sustainability in the Home Sector](#).

What are the requirements for niche markets?

Fair trade

The concept of fair trade supports fair pricing and improved social conditions for producers and their communities. Especially when the production of your table linen is labour-intensive, fair-trade certification can give you a competitive advantage.

Common fair trade certifications are from:

- [World Fair Trade Organisation \(WFTO\)](#)
- [Fairtrade International](#)
- [Fair For Life](#).

Tips:

Ask buyers what they are looking for. Especially in the fair-trade sector, you can use the story behind your product for marketing purposes.

Check the [ITC Standards map database](#) for more information on voluntary standards and their requirements, including fair production.

Sustainable textile certification

Across the home sector, sustainability is gaining ground. Although the actual use of certification is still not widespread in home textiles, there is an increasing interest from buyers.

The [Global Organic Textile Standard \(GOTS\)](#) ensures environmental and social responsibility throughout the production chain. To qualify, textile products must contain over 70% organic fibres.

[OEKO-TEX](#) Standard 100 certification guarantees no hazardous chemicals were used in production.

The [EU Ecolabel](#) for textiles focus on minimising environmental impact at the manufacturing stage.

Tips:

Read more on [GOTS](#), [OEKO-TEX](#) and the [EU Ecolabel](#) in the ITC Standards Map.

Determine which certification programme would be the best fit for you and apply if possible.

For more information, see our study about [buyer requirements for Home Decoration & Home Textiles](#).

6. What competition do you face on the European natural fibre table linen market?

The competition for table linen does not differ significantly from the sector in general. Refer to our [10 tips for doing business with European buyers](#).

7. Which channels can you use to put natural fibre table linen on the European market?

The market channels and segments for table linen do not differ significantly from the sector in general.

Market channels

Table linen from natural fibres can be found in a wide variety of stores, ranging from low-end discounters to more high-end retailers. A lot of shops that are not specialised in home textiles also sell table linen, since it is popular as a gift, or to complement the rest of their range. Think for instance of gift shops, garden centres (outdoor kitchen or barbeque) and especially supermarkets.

The channels through which table linen is put on the market follow the traditional patterns: import via importers/wholesalers that supply retailers, and larger retail chains that import themselves. E-commerce is still gaining in importance and more and more smaller retailers start buying directly from the supplier, but mainly when it concerns high-end kitchen linen.

Tip:

For more information about trading directly with smaller retailers, see our special study about [alternative distribution channels](#).

E-commerce

E-commerce in home decoration is increasing and can help you reach a broader range of customers. Retailers often combine online and offline channels. Consumers research and purchase products online, shopping around and comparing prices on home decoration items. To supply e-commerce retailers you must be able to work with individual packing and labelling, as well as limited minimum orders.

Tips:

See our special study about [E-commerce in Home Decoration & Home Textiles](#) for more information.
Target online business-to-consumer retailers if you can meet the additional requirements.

Trade associations and fairs

The following trade associations and fairs are useful sources for finding trading partners in Europe.

- [Ambiente](#), Frankfurt, February
- [EURATEX](#), European Apparel and Textile Confederation
- [Heimtextil](#), Frankfurt, January
- [Maison et Objet](#), Paris, January and September

Market segments

In the low-end segment, simple and inexpensive table linen is common. The middle segment puts more emphasis on design and finish, while prices are still reasonable. To supply the middle-high segment, you need to offer added value in the materials and/or craftsmanship you use. In the high-end segment, designer quality is common and private labels are the standard.

Products from China, Pakistan and India generally dominate the low-end market. Competing with this type of cheap mass production is almost impossible. If your production is mechanised (power looms etc.) you can target the middle-low end.

The middle and high-end markets offer you the most opportunities. To supply these segments you need to pay particular attention to design and quality.

8. What are the end-market prices for natural fibre table linen?

Prices for table linen vary depending on the specific product, composition, manufacturing technique, size, design and brand.

Table 2 gives an overview of the prices of natural fibre table linen in the low, middle and high market segments.

Table 2: Indicative consumer prices of natural fibre table linen

| | Low-end | Mid-end | High-end |
|-------------|---------|---------|---------------|
| Table linen | €2–20 | €25–95 | €100 and more |

The European consumer price of your table linen is around 4 to 6½ times your selling price. Shipping, import and handling add 15–20%. Wholesalers account for a further 50–90% markup. Retailers may add another 90–150% to the price. Finally, European VAT percentages range from 18% in Malta to 27% in Sweden.

Your original selling price depends heavily on the availability and cost of raw materials. For example, the average prices of cotton fluctuated considerably in recent years. Occasional increases in the price of raw materials are not directly passed on to the consumer, but do put pressure on exporters, importers and retailers' margins.


Tips:

The value perception of your product in the chosen segment determines its price. The quality and price of your table linen must match what is expected in your chosen target segment. To determine your price, study consumer prices in your target segment. Adjust your cost accordingly.


Understand your segment. Offer a correct marketing mix to meet consumer expectations. Adapt your business model to your position in the market.

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