

# The European market potential for hammam towels

Hammam towels are a popular product in the European market. Growing consumer interest in wellness and spa experiences, at home or not, are driving this demand, which has been further stimulated by the restrictions imposed in reason of the Covid-19 pandemic. Most of Europe's home textile imports come from developing countries, but those with a traditional connection to hammam towels are particularly important suppliers of these products. Offering the option to work via co-creation can give you a competitive edge.

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## 1. Product description

Hammam towels are also known as peshtemal, fouta or Turkish towels. They have been around since the 17<sup>th</sup> century and were traditionally connected with the Turkish hammam baths. Hammam towels are flat woven and much thinner than conventional terry towels. In recent years, interest has surged internationally and this soft, light, versatile towel has been rapidly gaining popularity.

In the home decoration and home textiles (HDHT) sector, hammam towels fall under the bath textiles subcategory within home textiles.

This study uses the following codes to indicate trade in hammam towels:

Table 1: Product codes\*

Harmonised System (HS)	Prodcom	Description
6302 91	13 92 14 50	Toilet linen and kitchen linen of cotton, excluding of terry fabrics

\* There are no specific HS or Prodcom codes available for hammam towels.

## Functionality

Because most hammam towels are flat woven and relatively thin, they dry quickly and are easy to pack, making them ideal for travel. While most commonly used as a bath or beach towel, a hammam towel can also be used as a throw blanket, sarong, scarf, baby blanket, or tablecloth. An alternative for flat woven is a honeycomb weave, which provides a bit more thickness and absorption capacity, and also gives a different look.

## Material

Traditionally, hammam towels were only made of cotton. Today, cotton is often blended with bamboo or linen fibres. Organic cotton is also becoming more common.

Traditional Turkish hammam towels are made from Turkish cotton, a type of cotton that has extra-long fibers,

which makes the towels softer, fluffier, and more absorbent than regular cotton after successive washings.

## Design

Hammam towels come in a wide variety of designs. The different styles include stripes and combinations of bright colours. The designs range from [bohemian chic](#) to nautical themes. The fringe can also be finished in a way that incorporates a particular design or unique attribute. Personalisation such as embroidering names onto the towels is a popular option, especially in the higher-end market segments. Because hammam towels are so in demand, variations on the classic design are emerging, such as hammam towels with plush terry cotton on the back.

## Size

Hammam towels are available in various sizes. Popular sizes include:

- 100 cm x 50 cm
- 160 cm x 90 cm
- 170 cm x 100 cm
- 180 cm x 100 cm
- 190 cm x 100 cm
- 200 cm x 100 cm
- 220 cm x 160 cm

Other sizes are also possible. Communicate the sizes you are able to produce to your potential European buyer at an early stage in the collaboration.

Picture 1: Hammam towels in a variety of colours and styles



## 2. What makes Europe an interesting market for hammam towels?

The European market for cotton toilet and kitchen linen, which includes hammam towels, has grown in recent years. Most of the import value is sourced from developing countries, making Europe an interesting market for you.

The [coronavirus](#) pandemic and the measures taken against it worldwide are expected to have a large impact on international trade and the European market for many products and services, including HDHT. Please note that the below analysis is based on the statistics that are currently available (2015–2019). Therefore, the expected impact of the pandemic on the European market and global supply chains have not been taken into account in this report. For the latest news in your sector, please check [CBI News](#).

The pandemic is expected to affect demand for HDHT products. The current crisis results in very low consumer confidence globally. In addition to worrying about their health, consumers also worry about whether they will have work and income, and to what extent their livelihood will be under pressure. This scenario obviously does not stimulate sales in HDHT. Many brick and mortar retail businesses in HDHT have been forced to close under local government public health rules (being non-essential), and many will not survive the crisis for financial reasons. In addition, the distribution chain in HDHT has also been severely affected.

On the other hand, the pandemic has increased demand for spa and wellness products, which could have a positive effect on the sales of hammam towels, or at least partially compensate for losses caused by the crisis.

The data below covers cotton toilet and kitchen linen in general, as there is no trade data available for hammam towels specifically.

European imports of cotton toilet and kitchen linen increased from €266 million to €291 million, at an average annual rate of 2.3% between 2015 and 2019. In comparison, worldwide imports of these products actually decreased from €655 million to €647 million in this period, increasing the European share of the global import market for cotton toilet and kitchen linen from 41% to 45%.

Approximately two-thirds of the total European import value between 2015 and 2019 was sourced from developing countries. These imports grew from €184 million to €199 million in the period, suggesting that Europe is an interesting market for you as an exporter from a developing country.

The increased customer focus on wellness is strongly driving market growth. For more drivers of demand, see 'which trends offer opportunities?' below.

### Tip:

For more information on the short- and long-term impacts of the coronavirus pandemic, see our study on [how to respond to COVID-19 in the HDHT sector](#).

## 3. Which European countries offer most opportunities for hammam towels?

The larger western European economies are the main importers of hammam towels. However, importers in these countries generally sell their products to other countries in Europe. Your best strategy therefore is to focus on a particular segment, rather than a specific country.

Germany, the United Kingdom and France are the leading importers of cotton toilet and kitchen linen in Europe

with approximately 15% of imports each. The Netherlands follows with 11%. Together, these countries accounted for more than half of the European total. Italy (8%) and Spain (7%) are smaller markets with a share smaller than 10%, but still in the top-six leading importing countries.

However, be aware that in the European market, different countries have different roles. You can make a rough distinction between countries that are mainly importers and countries that are mainly manufacturers. Most western European importing countries do not just import products for sales within their own country, but also to re-export to other countries in Europe. This explains why countries with small HDHT markets, like Denmark and the Netherlands, often import much more than the demand in their own domestic markets.

In terms of marketing, take into account also that a specific country does not necessarily correspond to a target market. In HDHT, each European country has different market segments, ranging from low to high (see also our study on [market entry](#) for hammam towels), although their sizes may vary per country. Therefore, it makes much more sense for you to identify a particular segment in your product group and connect to the importers and distributors in that segment, instead of focusing on a specific country. These distributors will then sell in that segment, not only in their own country but in other countries in Europe.

## **Real private consumption expenditure**

An important indicator of growth in demand is real private consumption expenditure. The HDHT sector, which includes the market for hammam towels, is sensitive to economic cycles. When economic circumstances and prospects are dim, consumers postpone buying non-essential items. Conversely, when economic conditions are favourable, private consumption expenditure and purchases of non-essential HDHT products surge.

In recent years, real private consumption expenditure in the leading European markets grew at annual growth of 1%–3%. Previous forecasts for the coming years suggested this positive trend would continue, but the coronavirus pandemic has made any predictions all but uncertain. The HDHT market responds to economic cycles, so demand is expected to reflect any potential economic fluctuations.

## **Germany is Europe's largest economy**

German imports of cotton toilet and kitchen linen slightly decreased from €51 million in 2015 to €45 million in 2019, at an average rate of -3.4%. The country sources about three-quarters of its import value from developing countries. These imports decreased from €39 million in 2015 to €32 million in 2019. Despite the decrease, this is the second-largest import value from developing countries among European countries, after the United Kingdom.

Pakistan (€9.8 million), India (€6.9 million), and China (€6.3 million) are Germany's leading suppliers of cotton toilet and kitchen linen. For hammam towels specifically, Turkey is probably among Germany's main suppliers. Between 2015 and 2019, German imports of cotton toilet and kitchen linen from Turkey fluctuated slightly around €3.6 million.

Germany is the largest economy in Europe, home to 19% of the European Union's population. The German economy is widely considered the stabilising force within the European Union, historically showing a higher growth rate than other member states. In fact, according to [The Economist](#), Germany will be the first major European economy to recover from the pandemic crisis. This expectation is based on the country's healthy finances before the crisis and the sheer size of its large industrial sector, whose reboot will consequently benefit suppliers abroad.

In the current uncertain circumstances, the combination of a large market for developing countries and the country's forecast economic recovery makes Germany one of the most interesting markets for you.

## **Brexit may negatively impact UK demand**

British imports of cotton toilet and kitchen linen dropped between 2016 and 2018. They bounced back to €44

million in 2019, resulting in an average annual growth rate of 1.2% between 2015 and 2019. The United Kingdom sourced approximately 92% or €41 million of these imports from developing countries in 2019. Together, Pakistan, Turkey, and India supply 75% of British toilet and kitchen linen imports. Again, Turkey is likely to play a particularly large role in hammam towel supplies specifically.

[The United Kingdom's withdrawal from the European Union](#) (Brexit) may have a major impact on consumer confidence. The uncertainties related to Brexit, the Covid-19 pandemic and the resulting economic slowdown are expected to affect HDHT product sales, including hammam towels. As such, your prospects in the UK for the next few years are modest. In the meantime, some British buyers that used to purchase from Europe have started importing directly from Asia to prepare for Brexit and deal with the devaluation of the pound.

## **France's growth slowing down**

French imports fluctuated around €43 million between 2015 and 2019, resulting in an average annual drop of 1.1%. Imports from developing countries show a similar pattern, fluctuating around €26 million, equivalent to a 61% share in 2019, which is below the European average. France's leading suppliers are India (€8.1 million), Pakistan (€5.8 million), the Netherlands (€5.7 million, mainly re-exports) and Tunisia (€5 million). Among these countries, Tunisia is probably the main supplier of hammam towels to France.

France's economic growth has slowed down recently after a gradual recovery in previous years. Global uncertainties and the effects of social unrests weighed on consumer confidence and sales of non-essential products. Adding the pandemic to this scenario indicates that imports are unlikely to continue their strong performance in the coming years.

## **The Netherlands is an important European trade hub**

With a strong average annual growth of 13%, Dutch imports of cotton toilet and kitchen linen increased from €20 million in 2015 to €32 million in 2019. This performance reflects a long period of consecutive economic growth for the Netherlands. Similarly, imports from developing countries increased from €16 million to €22 million, representing 52% of total imports in 2019.

Pakistan (€6 million), Germany (€5.4 million, mainly re-exports) and Egypt (€5.2 million) are the Netherlands' leading suppliers of cotton toilet and kitchen linen. For hammam towels specifically, Turkey (€3.3 million) is probably the country's leading supplier.

Brexit, the Covid-19 pandemic, the international trade dispute between the United States and China, and the trade dispute between the United States and Europe, all are expected to have a big impact on the Netherlands. Because the country heavily depends on international trade, negative developments in that area strongly affect its economic performance, which in turn would affect hammam towel consumption.

Since the Netherlands is a big re-exporter of goods, the impact on HDHT imports goes beyond the Dutch market itself to include developments in other European countries. Given the economic slowdown in Europe as a whole, an increase in imports is not expected for the coming year.

## **Italy expected to recover particularly slowly**

Italian imports of cotton toilet and kitchen linen were relatively stable between 2015 and 2019 at €23–€24 million. Imports from developing countries increased at an average annual rate of 2%, from €18 million in 2015 to €20 million in 2019, which is 84% of the total imports. India and Pakistan are Italy's leading suppliers of cotton toilet and kitchen linen, with approximately €5 million each. For hammam towels, Turkey (€2.3 million) is also likely to be an important supplier.

Despite these relatively promising developments, economic growth in Italy is likely to slow down as the country is particularly affected by the Covid-19 pandemic. In fact, out of the major European economies, [Italy is expected to be the slowest to recover](#). This scenario is expected to affect consumer confidence and the



consumption of non-essential products in the coming years.

## Spanish economy also expected to struggle

Spanish imports of cotton toilet and kitchen linen increased from €16 million in 2015 to €20 million in 2019, at a promising average rate of 6.4% per year. Spain sources 83% of its cotton toilet and kitchen linen imports from developing countries, which is considerably above the European average. These imports reached a value of €17 million in 2019. Together, Pakistan, China, and Egypt supply 60% of Spain's cotton toilet and kitchen linen imports. When it comes to hammam towels specifically, Turkey (€1.2 million) is probably also a key player.

Whether Spain can sustain demand for HDHT products largely depends on the effects of the coronavirus pandemic. At the moment, [The Economist expects the Spanish economy to experience the deepest contraction in Europe and be among the least recovered European economies by the end of 2021](#), which of course limits your opportunities in Spain for the coming years.

### Tip:

Do not just focus on specific European countries. Instead, identify the appropriate segment and let your buyers distribute your products within this segment across Europe.

## 4. What trends offer opportunities on the European hammam towel market?

Hammam towels play a key role in the major HDHT consumer trend of wellness, while also being affected by other trends, such as sustainability. For more information on these trends, see our study about [trends in HDHT](#). We outline each trend below, starting with the potential effects of the coronavirus pandemic on the HDHT market.

### The pandemic and trends in HDHT and hammam towels

It is hard to forecast what consumer trends in HDHT in the short and long terms. An expected post-pandemic effect is that people will be more focused on the home, as they have spent more time at home during the pandemic, and some of the changes that took place under the public health restrictions may become permanent.

Home decoration is not essential shopping and many businesses in the industry have had to close or decided to close due to lack of traffic. Consumers lack confidence now that their incomes and livelihood are under pressure, so they are also careful to spend beyond food, cleaning products, and other household essentials.

However, some areas and product groups could benefit, such as:

- wellness and fitness at home
- working from home
- cooking

Spending a lot of time at home has also moved consumers towards:

- a re-appreciation of their homes and the desire to make their home more pleasant, practical, and comfortable overall;
- bringing the outdoors inside and vice versa;
- cleaning out clutter.

These short-term trends are partly a continuation of consumer trends that were already ongoing, but some may accelerate. The pandemic has also exposed the fragile balance of the planet and the need for businesses to produce more sustainably, better manage the use of resources, workforce and the environment in general. These developments emphasise the importance of the existing wellness and sustainability trends in the hammam towel market.

## Wellness: the spa experience at home

European consumers are increasingly including spa and yoga practices in their lifestyles, seeking mental and spiritual wellness. According to the Global Wellness Institute, [Europe leads the world in spa revenues](#) with a market valued at €29 billion. Almost a third of the money spent at spas worldwide is spent in Europe. In addition, consumers are creating spa experiences at home, using relatively luxurious products in their own bathrooms. The current global health crisis is expected to further drive consumer interest in wellness.

As typical wellness products, hammam towels can benefit from this trend. Especially in the higher market segments, catering to those who can afford luxury and spa products.

Picture 2: Hammam towels form a perfect fit with the wellness trend and spa practices



### Tips:

When selling your hammam towels in line with the spa & wellness trend, you are advised to focus on the middle-high market segment and consider using organic fabrics and special (customised) designs.

Consider working together with producers of complementary spa and wellness products, in order to create a more coherent collection.

See our article on how [the COVID-19 crisis boosts the importance of the wellness trend in HDHT](#) for more information.

## Sustainability: new materials

Consumers and designers are shifting their preferences towards more sustainable choices, especially in the mid-high to high-end market segments. There is growing concern and awareness of the negative impacts of production and consumption, which is driving the popularity of sustainability labels and commitments in the textile industry.

For hammam towels specifically, being a wellness product, the use of sustainable raw materials is a logical choice. Materials like organic cotton, bamboo and linen are popular.

For small manufacturing companies, obtaining certifications for their raw materials may be a challenge. Therefore, it makes sense to buy raw materials that are already certified. If the minimum order quantities are too high, you can consider buying together with other producers.

## Vintage look

Currently, there is growing demand for hammam towels with a vintage look. Different methods can be used to achieve this, such as hand weaving or stonewashing techniques. In terms of eco-friendly production, stonewashing should be considered very carefully, especially when using acid to create the stonewashed look.

### Tips:

- Use natural, recycled or leftover raw materials and natural dyes.
- Use more environmentally friendly alternatives to stonewashing for a vintage look, such as enzymes.
- Promote the sustainable aspects of your towels as a premium.

## 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 in 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 collections increasingly often. They also try to minimise the risk of having too much stock. As a result, they are looking for shorter lead times and lower minimum orders. This is a distinct advantage for small- to medium-sized producers like you, since you are more flexible and can generally supply



smaller quantities than larger producers.

**Tip:**


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

[Fouta Tunisia](#) from Tunisia is an example of a company that has successfully tapped into some of the above-mentioned trends. The company offers fouta (hammam) towels in many different colours and textures, and clearly explains their advantages over regular terry towels.


This study was carried out on behalf of CBI by [Globally Cool B.V.](#) in collaboration with Remco Kemper.

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