



## [Exporting textile wallcoverings to Europe](#)

Textile wall coverings have become increasingly popular in the last few years. European consumers recognise that textile wall coverings are an easy and quick manner to change the ambiance of a room. Developing country exporters have already taken the first steps into this market, especially in the United Kingdom, but there is potential for more suppliers.

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## 1 . Product description

Textile wall coverings are textile materials used to cover and decorate the interior walls of homes and offices. They are usually sold in rolls and attached to a wall using adhesive substances.

Classification of textile wall coverings:

- Harmonised System (HS): within Europe, the following HS codes are used as indications for trade in textile wall coverings:
  - 5905.0000: textile wall coverings
- Prodcom: the following prodcom code is used to indicated European production of textile wall coverings:
  - 1724.1200: textile wall coverings 45 cm or more

Quality:

- Functionality: The primary function of textile wall coverings is decoration. It is seen as a way to transform a room into something different and unique. Next to the decorative purposes, it can also serve as heat and sound insulation.
- Raw material quality: Natural textile wall coverings are made of materials such as bark cloth, silk, linen, grass cloth, string, rattan, and actual impressed leaves. Synthetic textile wall coverings are made of polyolefin yarns, which are olefin fibres made from polymers or

copolymers of propylene.

- Design: Textile wall coverings usually come with a regular repeating pattern design, making it easy to hang pieces from the same roll next to each other. Textiles used as wall coverings are manufactured in a variety of widths and constructed of natural and olefin fibres.

## Labelling:

- Labels for transport normally include information on the producer, consignee, composition of the product and the size of the product, number of pieces, pallet identification and total number of pallets, net and gross weight.
- The most important information on the product or packing labels of textile wall coverings is: composition, size, origin and care labelling. For more information and illustrations of product labelling, please refer to Labelling of home textiles under the Legal Requirements in this document.

## Packaging:

- When shipping your product to a client, the wall coverings should be packed according to the instructions of your buyer. Packaging usually consists of plastic wrapping to protect the fabric from water, solar radiation and staining. The packaging should be easily manageable in terms of size and weight. Preferably, they are placed together in boxes and then on pallets.
- Textile wall coverings are usually displayed as small samples. Attractive consumer packaging is therefore of minor importance. In general, consumer packaging can be simple in design, but needs to be protective.

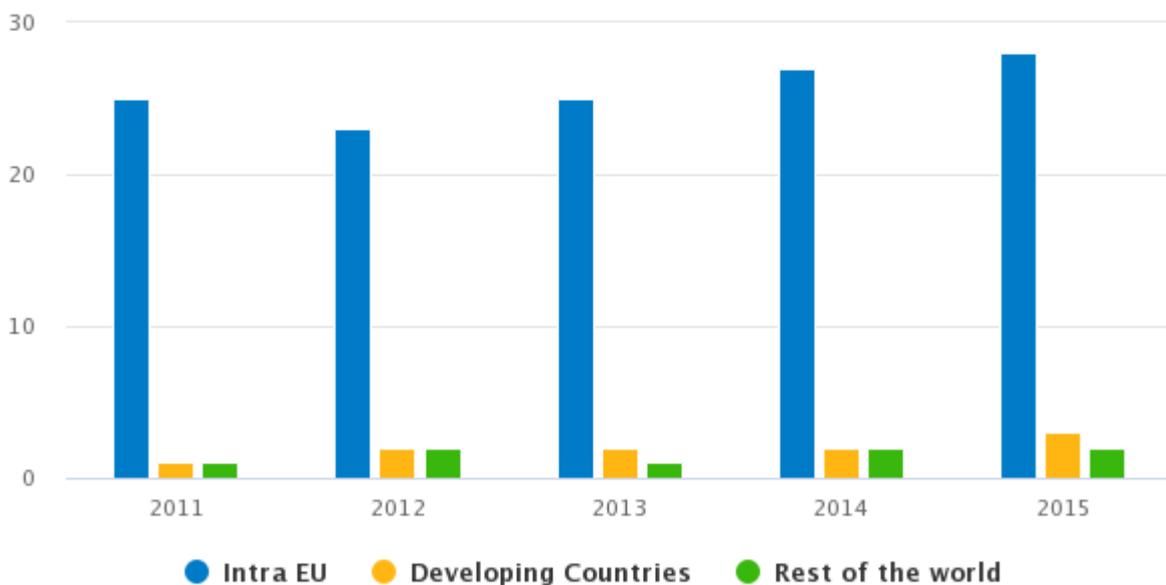
## 2 . Which European markets offer opportunities for exporters of textile wall coverings?

European imports of textile wall coverings are relatively small, but increasing. The share of developing countries in this market is growing. Europe's main importer of textile wall coverings, by far, is The United Kingdom.

Imports

Figure 1: European imports of textile travel accessories

By main destination

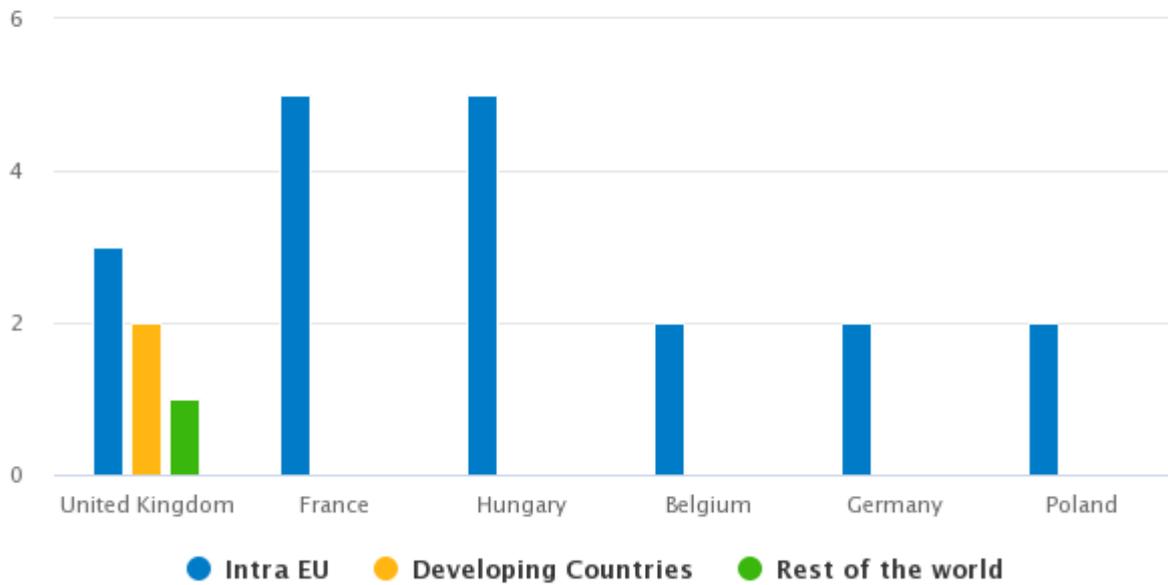


Source: Trademap

Source: Trademap (2015)

Figure 2: Main importers of textile travel accessories

2015

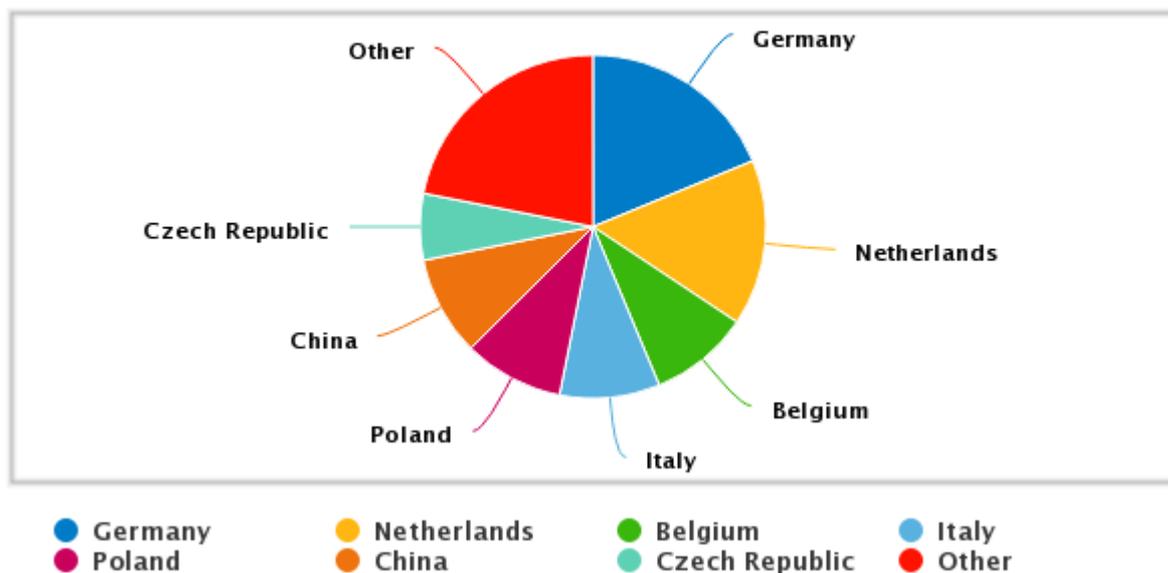


Source: Trademap

Source: Trademap (2015)

Figure 3: Leading suppliers of textile travel accessories

2015



Source: Trademap

Source: Trademap (2015)

- European imports of textile wall coverings increased from € 27 million in 2011 to € 33 million in 2015. The average annual growth rate was 5.2%.
- In the coming years, European imports are expected to keep growing moderately.
- Developing countries only accounted for 9.3% Europe's main source of textile wall coverings. This amounted to € 3.1 million in 2015, after an average annual growth of 22%. The share is also increasing and expected to continue to do so in the coming years.

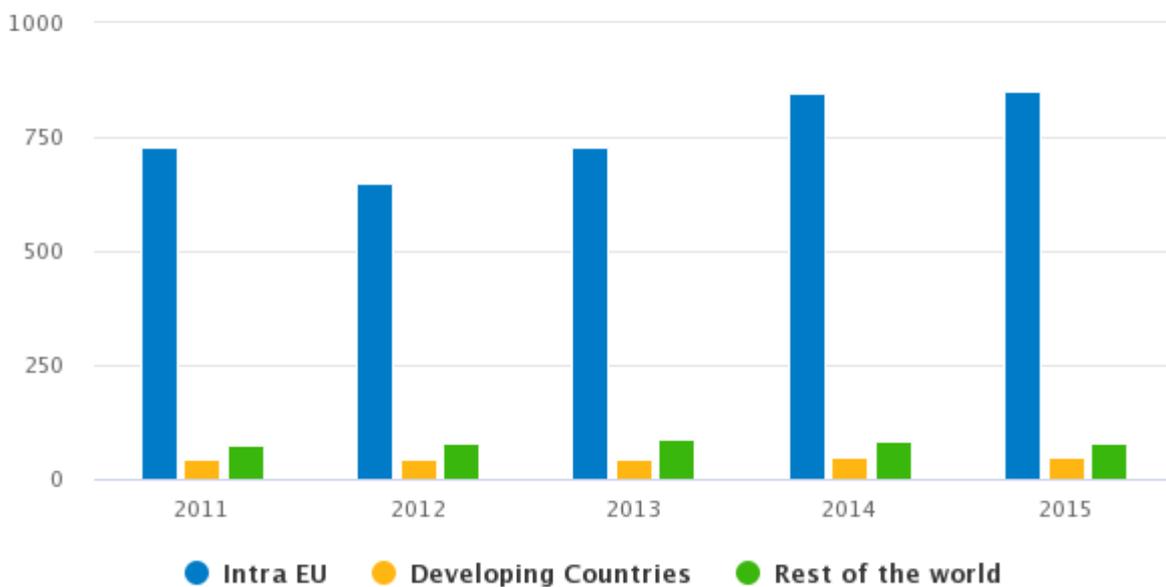
- The United Kingdom is Europe’s leading importer of textile wall coverings, with € 5.6 million in 2015. France and Hungary follow with € 5.2 million and € 5.0 million respectively.
- The United Kingdom is responsible for almost 90% imports from Developing Countries, with € 2.2 million.
- The total European increase in imports from developing countries between 2011 and 2015 was completely caused by the United Kingdom. It increased its imports with € 1 .8 million. In most other European countries, these imports were fairly stable.
- European countries dominate European textile wall coverings imports. An important supplier from developing countries is China, with 9%.

### Tips:

- Focus on the United Kingdom. Its relatively large and growing imports from developing countries make it an especially interesting market.
- Compare your products and company to the strong competition from China, as well as Eastern European countries like Poland and the Czech Republic. You can use [ITC Trademap](#) to find exporters per country. You can compare:
  - market segment
  - price
  - quality
  - target countries

Figure 4: European exports of sleepwear

By main destination



Source: Trademap

Source: Trademap (2015)

- European textile wall covering exports consist mainly of trade within Europe and with developed countries.

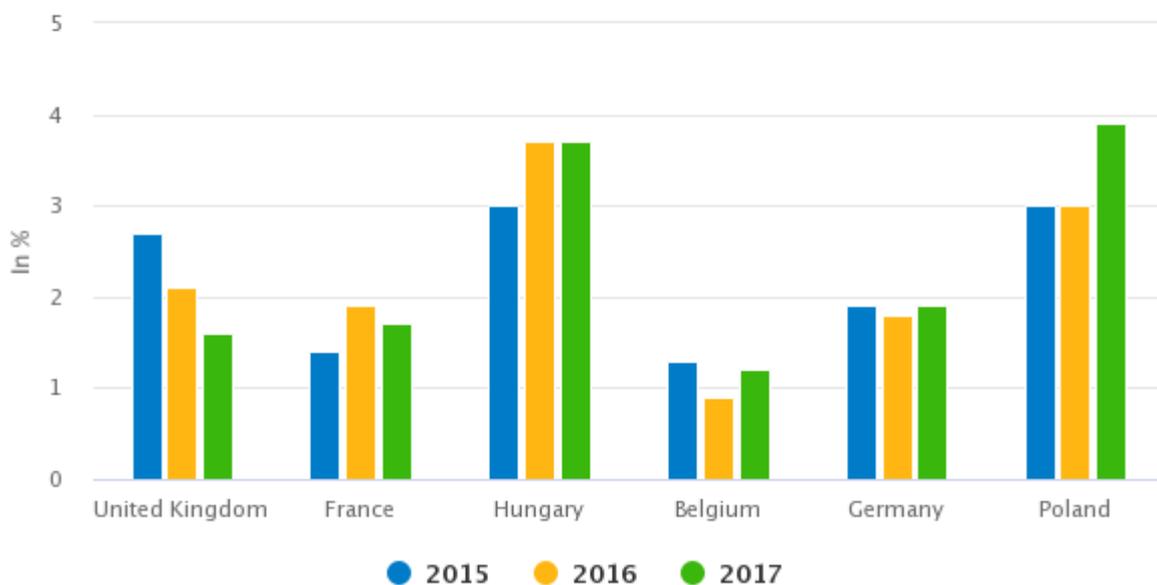
- Belgium and the Netherlands are Europe's leading textile wall covering exporters with € 14 million each. Italy follows with € 10 million.

## Production and consumption

- Despite impressive growth in demand, Europe's production of textile wall coverings is much larger than its demand. However, imports don't seem to be negatively affected as they continue to increase.
- Between 2010 and 2014 European textile wall covering production fluctuated slightly around € 55 million. This was also the production value in 2014.
- In the same period, European textile wall covering consumption increased considerably from € 23 million to € 29 million. This was mainly due to a strong increase of 26% in 2014.
- With € 15 million, Belgium is responsible for 28% of European textile wall covering production. The Netherlands and Italy follow with € 11 million each.
- European textile wall covering consumption is highest in the United Kingdom and France, at € 5 million each. Hungary follows with € 4 million. These countries are also Europe's main importers of textile wall coverings.

Figure 5: Real private consumption expenditure growth

Change from previous year



Source: Eurostat

Source: Eurostat

- Private consumption expenditure is an important indicator for the European home textiles 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 2015 and 2017, European private consumption expenditure is expected to increase. This means that consumption of luxury and decorative products is likely to rise. Especially in emerging markets, consumers will have more money available to spend on these products. Consumers in mature markets already spend a fair amount of money on luxury, so growth in their consumption will be moderate.

## 3. What trends offer opportunities on the European market for textile wall coverings?

Textile wall coverings have made a comeback. Whereas wall coverings were perceived as old fashioned in the past two decades in the middle market, they have developed into a trendy and extremely desirable design element. This shift is hardly surprising since consumers have seen that

textile wall coverings enable them to make significant changes in a room's ambiance, with relatively little effort.

## Nature on the wall

The growing trend of moving nature into the house interior is also prevalent in the wall covering market. This starts with an increased use of *actual natural coverings*, such as peacocks feathers, grass and leaves. Next to this, there are *printed wall coverings* with natural materials, such as wood, rock or brick, or representations of nature, such as landscapes, forests or flowers. This way, both types of wall coverings increase the natural feeling in the house.

### Tip:

- Feel free to experiment with different textures, colours and fabrics, taking into consideration the dominant trend of bringing nature indoors. Sea and forest landscapes, together with pebbles and tree branches are already quite popular patterns for wall coverings.

## Traditional trendy

Bygone themes are experiencing a revival: fabric reprints from the 50s and 60s are again popular. Complex patterns can be used, such as geographical and natural geometrical shapes that can give a vintage and eclectic look to any interior.

### Tip:

- Consider original fabrics and patterns that can provide the traditional look.

## The simple life

Simple, practical and more sustainable designs are becoming more popular in the textile wall covering market. Adopting the motto 'less is more' and aiming at quality, consumers and designers are focusing more on organic textile wall coverings with material such as silk, cotton, linen, jute, etc.

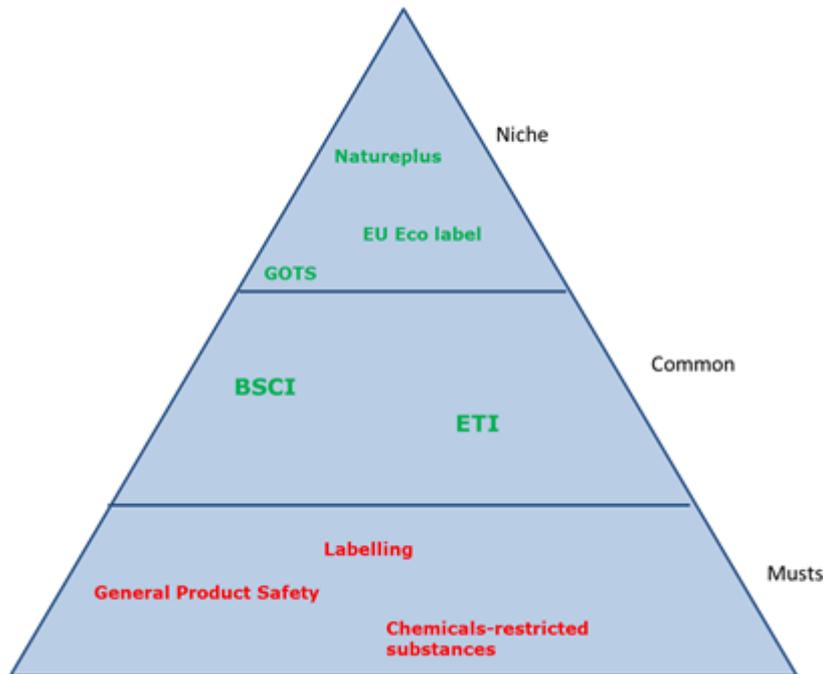
### Tip:

- Consider certification of your textile wall coverings. Several certifications exist that address the use of sustainable raw materials. [The Global Organic Textile Standard \(GOTS\)](#) (see requirements) is a relatively common type of certification in the European textile wall covering market.

Please refer to [CBI Trends for Home Decoration & Textiles](#) for more information on general trends in home textiles.

What requirements should textile wall coverings comply with to be allowed on the European market?

Figure 6: Buyer requirements



## 4 . Legal requirements

General Product Safety: The [General Product Safety Directive \(GPSD\)](#) states that all products marketed in the European Union must be safe to use, so that it forms a network for all legislation established for specific products and issues. Even if no specific legal requirements have been established for your product and its uses, the General Product Safety Directive still applies. If there are specific requirements applicable to textile wall coverings, the General Product Safety Directive applies in addition, covering all other safety aspects that may not have been described exclusively in the product's specific legal requirements.

### Tips:

- Study the specific legal requirements listed, but also use your common sense to ensure the product does not cause any danger in its normal use. Most buyers will require proof of the developing country exporter's compliance with legal requirements and most large retailers have their Codes of Conduct. You can read more about the [General Product Safety Directive in the EU Export Helpdesk](#)

Chemicals-Restricted Substances: The European Union has restricted a great number of chemicals in products that are marketed in Europe. These are listed in the [REACH](#) regulation. For the specific product (textile wall coverings), the following additives are forbidden: Halogen organic compounds, synthetic-organic fire retardants, moth-proofing agents and antimicrobial additives, azo dyes/colorants, which are capable of decomposing carcinogenic amines and dispersion colorants which are carcinogenic or cause allergic reactions.

Labelling-specific rules for textiles: Textiles should be labelled or marked indicating fibre composition whenever they are made available on the market and should be durable, easily legible, visible and accessible. The main purpose of the European Union's [Textile Regulation](#) is to ensure that consumers, when purchasing textile products, are given an accurate indication of their fibre

composition.

There is no European Union-wide legislation on the use of symbols for washing instructions and other care aspect of textile articles, while consumers consider care instructions to be important information on a product's label. You are therefore advised to follow ISO standards on this matter.

### Tips:

- Know your own product and study the labelling rules of the European Union to find out how it should be labelled in the European Union. For example, if you use a cotton name, trademark, or other term that implies the presence of a type of cotton, the generic fibre name "cotton" must be used. Find out more about [textile labelling rules in the EU Export Helpdesk](#).
- You are advised to follow [ISO 3758: 2012](#) on care labelling code using symbols for textiles.

## 5 . Additional requirements

Social performance: Sustainability is one of the ways for companies to differentiate themselves, and the means of offering sustainable products are numerous, ranging from recycling to certification and use of labels. Specifically for textile wall coverings, sustainability issues are very relevant. The processes of manufacturing wall coverings and component materials are energy intensive and require significant water use and disposal of by-product waste. Two retail initiatives have gained quite some ground, particularly in West European countries:

The [Business Social Compliance Initiative \(BSCI\)](#) has been developed by European retailers to improve social conditions in sourcing countries. Suppliers of BSCI participants are expected to comply with the BSCI Code of conduct. To prove compliance, your production process can be audited at the request of the importer. Once a company has been audited, it will be included in a database that can be used by all BSCI participants.

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

### Tip:

- Since more and more European importers participate in BSCI and ETI, complying with the BSCI and ETI codes of conduct will be seen as a basic requirement.

## 6 . Niche requirements

While sustainability is gaining ground, the actual use of certification is still not widely spread in the market for wall coverings. Nevertheless, there are several eco-labels that can be used for textile wall coverings.

[Natureplus](#) is a quality label for sustainable building and accommodation products, tested for health, environmental-friendliness and functionality. The Natureplus Eco-label mainly focuses on the protection of limited resources by the minimisation of the use of petrochemical substances, sustainable raw material extraction/harvesting, resource-efficient production methods and the

longevity of the products. Suppliers of certified products must also comply with all the relevant legal requirements applicable in the relevant country with regard to manufacture, sale and actual use.

### Tip:

- Check the possibility for your company to obtain a Natureplus certification, since its value is well established and highly regarded internationally. Conformity with Natureplus standard is verified by an independent organisation (third party) following [ISO 17025 Testing and Calibration Laboratories](#).

Textile wall coverings can also be certified by the more common niche certifications. [The Global Organic Textile Standard \(GOTS\)](#) is a textile-processing standard for organic fibres. The European Union's [Ecolabel](#) also addresses chemicals environmentally-friendly options.

### Tips:

- Explore the possibility of sourcing organic cotton. Textile products that contain a minimum of 70% organic fibres can become GOTS certified.
- Consider the Ecolabel for your product. The label is awarded only to products with the lowest environmental impact in a product range.

For a complete overview of certifications for textiles please turn to [ITC's Standards Map](#)

What competition do I face on the European textile wall coverings market?

Please refer to [CBI Home Textile Field of Competition](#), as the competitive field for textile wall coverings does not differ significantly from this general overview.

## 7 . Through which channels can you get textile wall coverings on the European market?

Please refer to [CBI Home Textile Channels and Segments](#), as the market channels and segments for textile wall coverings do not differ significantly from this general overview.

## 8 . What are the end market prices for textile wall coverings?

There is a very wide price range within the European market for wall coverings. Textile wall covering retail prices can vary from €8.5 to €110 per roll. The prices vary based on the size and composition of the product, as well as the brand or designer.

Table 1: Indicative consumer prices

	Low end	Middle-low end	Middle-high end	High end
Textile wall coverings	€8.5-€26	€30-€60	€60-€89	€110 or more

### Tip:

- Developing country producers are recommended to focus on the middle-high segment if they can offer some added value through traditional craftsmanship, or on the middle-low end if one offers mechanised production.

## Rising raw material prices pressure on margins

Besides energy, labour and transport costs, FOB prices depend heavily on the availability and prices of the raw materials. Between May of 2015 and 2016, the average prices of for instance cotton fluctuated about every three months. In total, they noted a moderate decrease of about 5%. This example shows the fluctuating character of the raw materials' market. Incidental price hikes of raw materials cannot directly be passed on to the consumer, but exert pressure on exporters, importers and retailers' margins.

### Tip:

- Calculate your prices regularly and carefully, especially when you know that prices of your raw materials are regularly fluctuating. When prices of your raw materials pressure your margin for a longer period, consider increasing your price or finding another suitable alternative.

Figure 7: Indicative price markups



Source: ProFound 2014

\*percentages are around 20%.

## 9 . Useful sources

### Trade fairs

Visiting, and especially participating in, trade fairs is highly recommended as one of the most efficient methods for testing market receptivity, obtaining market information and finding prospective business partners. The most relevant trade fairs in Europe for exporters of textile wall coverings are:

- [Maison & Objet](#) - Paris, France
- [Heimtextil](#) - Frankfurt, Germany
- [Ambiente](#) - Frankfurt, Germany

- [Mood](#) - Brussels, Belgium

Please review our [market information disclaimer](#).