



CBI Product Factsheet Oilcloth

'Practical market insights into your product'

Supplies from developing countries to the European market have increased substantially in the last five years. The element of kitsch and folklore, which is part of oilcloth's identity, is culturally in line with many developing countries, therefore DC exporters can take advantage of this. Apart from kitsch, or 'vintage look' as it can be called, DC exporters can diversify their products using sustainable raw materials and designs which can decorate a garden in an elegant way.

Product definition

This section provides an overview of the products within the range of the general product view, as well as mentioning the common trade names of the product.

An oilcloth is usually a cotton or polyester piece of cloth which is treated on one side with a waterproof coating, while the back is untreated. The pattern is printed in the first layer of coating. This is then additionally coated with a clear layer of PVC, making the oilcloth stain resistant and it can simply be wiped clean with a cloth or sponge.

Classification of oilcloths:

- **Harmonised System (HS)** Within the EU / EFTA, the following HS codes are used as indications for trade in oilcloths:
 - 5903.1000: textile fabrics impregnated, coated, covered with polyvinyl chloride
 - 5903.2000: textile fabrics impregnated, coated, covered with polyurethane
 - 5903.9000: textile fabrics impregnated, coated, covered, with other plastics
- **Prodcom:** the following prodcom code is used to indicate EU / EFTA production of oilcloths:
 - 1396.1400: textile fabrics impregnated, coated, covered

Product specification

This section gives an overview of the product's key specifications regarding quality requirements, labelling, materials, design and packaging.

Quality:

- **Functionality:** Oilcloth is mostly used as a raw material for tablecloth both for indoor and outdoor use. Nevertheless, like every other textile article, oilcloth increasingly fulfils a decorative role, mainly used for gardens and terraces.
- **Raw material quality:** Materials such as cotton and linen fibres are used for the primary fabric for oilcloth. Vinyl and PVC are used to laminate the

Examples of oilcloths



Source: ebay.com



Source: fabricdepot.com

fabric, in order to make the fabric waterproof. Using such lamination materials will also prevent your oilcloth from stretching, fading and cracking.

- **Durability:** Oilcloth should be made with durable and easy to maintain materials, such as cotton and polyester.
- **Design:** Oilcloths comes in a large variety of colours, styles and patterns. Some of them include striped or spotty oilcloth, vintage looking, animal print, floral, folklore as well as plain coloured. There are several sizes available in the European market .The most common oilcloths are 120cm and 135cm wide, but other sizes are available. Oilcloth can be also sold on rolls. It is therefore important to know the sizes before making any market entry efforts. It is recommended that you communicate, to potential EU buyers, the size you are able to produce while in the early stages of collaboration.

Labelling:

- Labels for transport should include information on the producer, consignee, composition of the product and the size of the product, number of pieces, box/roll identification and total number of boxes/rolls, net and gross weight.
- The most important information on the product or packing labels of oilcloth is composition, size, origin and care labelling. For more information and illustrations of product labelling, please refer to the labelling-specific rules for textiles under buyer requirements.

Packaging:

- When shipping your product to a client, your oilcloths should be packed according to the instructions of your buyer. The packaging usually consists of plastic wrapping to protect the oilcloth from water, solar radiation and staining.
- The packaging should also be in dimensions and weight, which are easy to handle. Standards in Europe are often related to labour regulations at point of destination and will have to be specified by the buyer. Boxes and rolls are usually palletised for air or sea transport and exporters are requested to maximise pallet space.
- Oilcloths on rolls are usually displayed unpacked, making attractive consumer packaging of minor importance. Other oilcloths, already cut in specific measurements, can be simply packed in a paper or plastic wrapping.

Example of displayed oilcloths

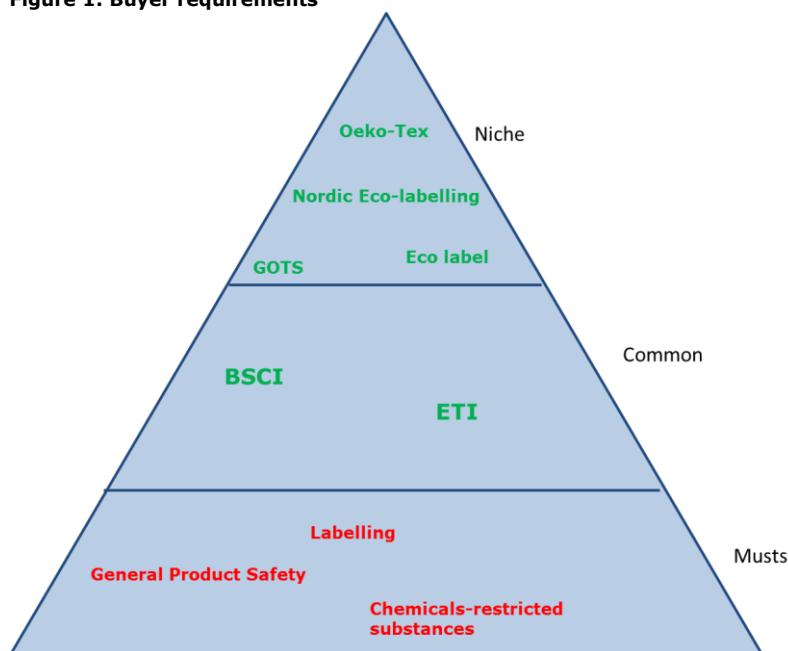


Source: burlapfabric.com

Buyer Requirements

This section provides an overview and analysis of requirements that DC exporters face in the market for oilcloth. The analysis includes legal requirements and non-legislative requirements.

Figure 1: Buyer requirements



Requirements you must meet

General Product Safety: The general product Safety directive states that all products marketed in the EU must be safe to use and forms a network for all specific legislation established for specific products and issues. 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 oilcloths, the general Product Safety Directive applies in addition, covering all other safety aspects which may not have been described specifically.

CFA¹: Study the specific legal requirements listed to ensure the product does not cause any danger in its normal use. Most buyers will require proof that the DC exporter complies with legal requirements and most large retailers have their Codes of Conducts. You can read more about the [General Product Safety Directive in the EU Export Helpdesk](#).

Chemicals-Restricted Substances: The EU has restricted a great number of chemicals in products which are marketed in the EU. These are listed in the so-called REACH regulation (Regulation (EC) 1907/2006). If you dye your oilcloths, make sure you do not use any of the [azo dyes](#) that release any of the 22 aromatic amines which are prohibited. EU legislation lists the aromatic amines, but not the azo dyes which release them. The vast majority of azo dyes is therefore legally acceptable. Furthermore, the [flame retardants](#) which can be used have been restricted, where Tris (2,3 dibromopropyl) phosphate (TRIS); Tris (aziridinyl) phosphineoxide (TEPA) and; Polybromobiphenyles (PBB) have been prohibited in products intended to come into contact with the skin.

¹ Consideration for action

CFA: In the case of dyeing: Make sure your products do not contain any of the *azo dyes* which release the forbidden aromatic amines. This includes checking your own suppliers. To test your products, use the official tests. You can find the tests on the [CEN website](#): CEN Textiles – Methods for the determination of certain aromatic amines derived from azo-colorants – Part 1: Detection of the use of certain azo-colorants accessible without extraction. Reference: EN 14362:2003 / EN 14362-1:2012.

CFA: Follow 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 \(EFRA\)](#). The addition of other flame retardants and proofing agents is only permitted for products that are intended for use in commercial buildings where they are subject to and fulfil the appropriate fire protection regulations. Familiarise yourself with the full list of restricted substances in products marketed in the EU by checking out [restricted chemicals in textile products in the EU Export Helpdesk](#).

PVC: In fabrics coated with polyvinyl chloride (PVC) intended for outdoor applications, there are certain chemical substances that are forbidden to enter the European market. Consequently, if you use PVC for the coating of your oilcloth know that organostannic compounds are also restricted.

CFA: Find out more about PVC [here](#).



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 EU Regulation is to ensure that consumers, when purchasing textile products, are given an accurate indication of their fibre composition. There is no EU wide legislation on the use of symbols for washing instructions and other care aspect of textile articles. However, note that consumers consider care information the second most important information on a product's label (after size). You are therefore advised to follow ISO standards on this matter.

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

Common requirements

Social performance: Companies/producers can differentiate themselves by introducing sustainability. The means of offering sustainable products are numerous, ranging from recycling to certification and use of labels. Two retail initiatives have gained quite some ground, especially in West-European countries:



The [Business Social Compliance Initiative \(BSCI\)](#) has been developed by European retailers to improve social conditions in sourcing countries. Suppliers to 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 is audited, it will be included in a database which 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 of people across the globe who make or grow consumer goods.

CFA: Since more and more European importers participate in BSCI and ETI, complying with the BSCI and ETI codes of conducts is currently seen as a basic requirement. If you haven't done so already, you may want to look into the opportunities for improving your sustainability performance. This may not always include immediate certification or application of a label, but familiarising yourself with issues included in the initiatives will give you an idea of what to focus on. Also see CBI's publication '[CBI Tailored Intelligence: the Sustainable Design market for Home Decoration and Home Textiles](#)'

Niche requirements



While sustainability is gaining ground, the actual use of certification is still not widely spread in this sector. Nevertheless, there are several eco-labels used for textiles, including oilcloths. As this is a means of demonstrating sustainability, there is an increasing interest from buyers. [The Global Organic Textile Standard \(GOTS\)](#) is a textile processing standard for organic fibres; [OEKO-TEX](#) stands for no use of hazardous chemicals; and the [EU Ecolabel](#) also looks to chemicals environmentally-friendly options.

CFA: Check the possibility of sourcing organic cotton for your oilcloths. Textile products which contain a minimum of 70% organic fibres can become GOTS certified.

CFA: Consider the Oeko-Tex® Standard 100 for your product. The certification provides textile and clothing companies with more transparent supplier relationships and facilitates the flow of information regarding potential problematic substances.

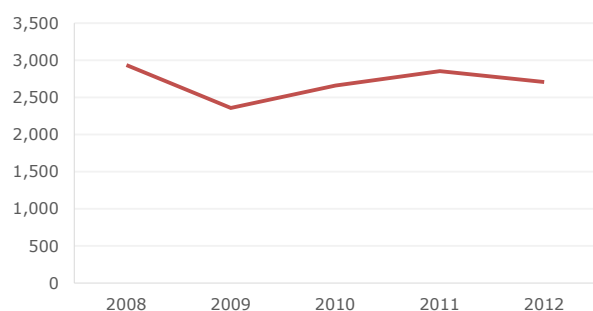
CFA: Consider the EU Ecolabel for your product. The label is awarded only to products with the lowest environmental impact in a product range.

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

Trade and Macro-Economic Statistics

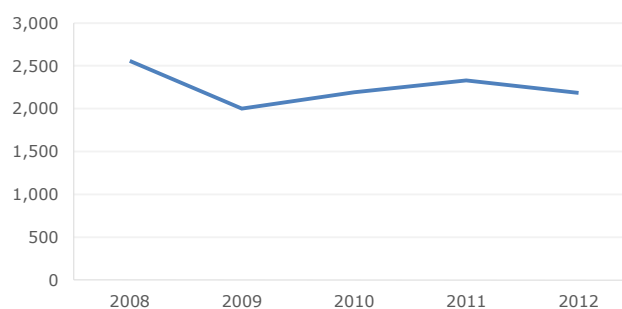
A statistical analysis of the major product developments and forecasts will be given, based on trade and macro-economic statistics. The statistical indicators being analysed are import, export, production and consumption statistics for oilcloth. Trade data on country level are not made available by Eurostat. Therefore, production and consumption trends for oilcloth are reported on an aggregate EU/EFTA level.

Figure 1: Production of oilcloth in the EU/EFTA, values in € million



Source: Eurostat Prodcom (2014)

Figure 2: Consumption of oilcloth in the EU/EFTA, values in € million



Source: Eurostat Prodcom (2014)

Small fluctuations in production

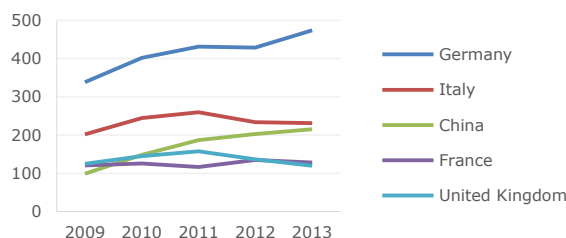
Between 2008 and 2012, European production of oilcloth fluctuated significantly, showing an annual average decrease of 2% per year. After a decrease in production between 2008 and 2009, production levels increased in the course of 2010-2012, followed by a decrease in 2012. Total European production of oilcloth amounted to €2.7 billion in 2012.

Decreasing consumption

European consumption of oilcloth decreased slightly, amounting to €2.2 billion in 2012, noting an annual decrease of 4% per year. In the period 2008-2009, there was a decrease in consumption, followed by an increase during 2010 and 2011. After 2011 consumption decreased slightly.

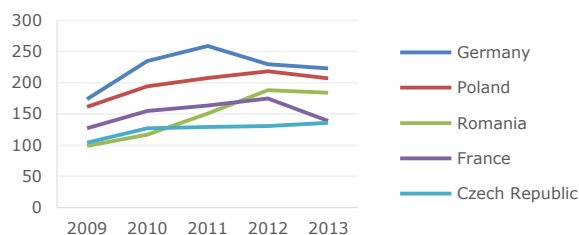
CFA: GDP & consumer confidence are expected to increase in 2014, as mentioned in the [CBI Trade Statistics for Home Decoration](#). As GDP and consumer confidence are growing, consumers are more willing to spend money on non-essential home articles and gifts, which will positively affect sales of oilcloth.

Figure 3: Leading suppliers of oilcloths to Europe, value in € million



Source: Eurostat (2014)

Figure 4: Leading export destinations of oilcloths, value in € million



Source: Eurostat (2014)

Continuous growth in imports

Imports of oilcloths demonstrated a significant growth between the years 2009 and 2013, showing an annual increase of 7% per year. Total imports amounted to €1.9 billion in 2013. Germany has been the leading supplier to the EU market for the last four years. China is the biggest DC supplier and its influence has been growing significantly, with imports amounting to €215 million in 2013, showing an annual increase of 21.4%. Imports from East-European countries, such as Slovakia and Slovenia, have been increasing. Imports from emerging suppliers, such as Morocco, Colombia and South Africa, have also been increasing.

CFA: Competition from developing countries has been significant for oilcloth imports. This further offers opportunities for DC exporters. Make sure that you stand out from the crowd by offering added value, i.e. craftsmanship and hand-made products.

European exports to other mature markets

EU exports of oilcloth amounted to almost €2.5 billion in 2013, showing an annual increase of 7% per year. The main destinations were other mature markets in the European Union such as Germany and France. However, East-European countries, such as Poland and Romania, have become important destinations for oilcloths. This development is thought to be due to the intrinsic relationship between the folklore element and traditional culture in the eastern part of Europe.

For more macro-economic trends related to the market for oilcloths, please refer to the module [CBI Trade Statistics](#).

Market Trends

The trends provide an overview of relevant market trends and forecasts in the market for oilcloth.

In the European market for oilcloths, the kitsch look, outdoor living and sustainability are prevailing trends among designers and consumers.

Revival of the kitsch look

Tablecloths are popular again after being portrayed as outdated in the past decade. The oilcloth market has undergone something of a resurgence in recent years as the 50s, kitsch designs enjoy a surge in popularity. Returning to a time gone by, possibly from childhood, or from parents' childhoods, is something that is becoming increasingly popular in the European market.

CFA: Consider kitsch patterns for your oilcloths as they are becoming fashionable again, such as colourful flower prints fruit bowls, etc.

Example of kitsch oilcloths



Source: onlyoilcloths.co.uk

Outdoor Living

In Europe, outdoor spaces around the house are increasingly considered to be an extension of the home. Consequently, consumers buy elegant and durable products to furnish and decorate gardens and terraces. An oilcloth is no longer a simple table cloth, but has developed into a trendy product for an outdoor living room. Fabrics and colours follow the fashion trends, transforming the garden into an outdoor oasis.

CFA: Consider using elegant materials and designs which can be matched with living room furniture, especially when you are targeting the high and middle-high ends of the market. For more information on fashion trends, please refer to the [CBI Fashion Forecast 2015](#).

Example of outdoor living



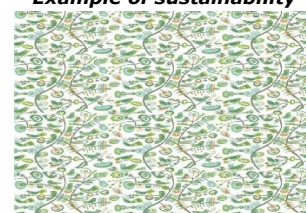
Source: dottybrown.com

Sustainability

Sustainability in production and consumption of home textiles has gained significance in the past few years. Consumers find it increasingly important to avoid negative impacts on the environment, due to their consumption. Consequently, designers and producers focus on minimising the impact of their production on the environment. Eco-friendly oilcloths made from organic cotton and finished with a soft, biodegradable coating are becoming increasingly popular.

CFA: Consider eco-friendly materials for your oilcloth construction, such as organic cotton and certified coating materials (phthalate-free, biodegradable coating) especially when you are targeting the high and middle-high segments of the market.

Example of sustainability



Source: trueup.net

CFA: For more information on trends for sustainable home decoration and textile products, please read the CBI Trend Special Sustainability. For more information on coating please refer to Legal Requirements and PVC section.




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

Market Channels and Segments

A description of the characteristics of different segments within the channel will be given.

In order to illustrate the different segments in the oilcloth market, examples of oilcloths are presented in the table below. In the low segment, affordable and practical oilcloths are common. In the middle segment, oilcloths are made of higher quality raw materials, combining compostable textiles with biodegradable coatings. In the high segment, designers' quality is common.

Table 1: Indicative channels and segments

Low: affordable and practical	Middle: high material quality	High: designers quality
		
Source: the2seasons.com	Source: ljunbergfactory.com	Source: studioblog.com

As market segments for oilcloth do not differ significantly from this general overview, please refer to [CBI Home Textile Channels and Segments](#) for a general overview of market segments

Prices

This section provides an overview of the product's consumer prices on the European market.

There is a wide price range within the European market for oilcloths. Oilcloth retail prices can vary from €7 to €85 or more. The prices vary based on the size, fabric and composition of the product, as well as the brand of the oilcloth.

Table 2: Indicative consumer prices

	Low end	Middle-low end	Middle-high end	High end
Oilcloth	€7-€18	€20-€30	€40-€63	€85 or more

Your products will be sold to European consumers for a price that is significantly higher than your selling price. The consumer price is approximately 4-7 times the FOB price in the country of origin. Besides energy, labour and transport costs, FOB prices depend heavily on the availability and prices of the raw materials. Incidental price hikes of raw materials should not be directly passed on to the consumer, but exert pressure on exporters, importers and retailers' margins at first.

Figure 1: Indicative price breakdown for oilcloth



Source: ProFound (2014)

Field of Competition

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

Useful sources

Useful sources provides an overview of valuable references for DC exporters relevant to oilcloth.

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 oilcloths are:

- [Maison & Objet](#) - Paris, France
- [Heimtextil](#) - Frankfurt, Germany
- [Ambiente](#) - Frankfurt, Germany
- [Haus - Garten - Freizeit](#) - Leipzig, Germany
- [Countryside](#) - Ghent, Belgium

More information

CBI market information: Promising EU export markets.
 EU Expanding Exports Helpdesk - <http://exporthelp.europa.eu> - go to 'trade statistics'.
 Eurostat - <http://epp.eurostat.ec.europa.eu/newxtweb> - statistical database of the EU.
 Several queries are possible. For trade, choose 'EU27 Trade Since 1995 By CN8'. Use the guide 'Understanding Eurostat: Quick guide to easy comext' (http://epp.eurostat.ec.europa.eu/newxtweb/assets/User_guide_Easy_Comext_20090513.pdf) for instructions.
 International Trade Statistics - <http://www.trademap.org> - you have to register

This survey was compiled for CBI by
 ProFound – Advisers In Development

in collaboration with
 CBI sector expert Steve Pepper

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