

Entering the European market for bed textiles

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The European market for bed textiles offers good opportunities. As volume-producing countries dominate the lower ends of the market, the middle-high segment is the best option for added-value products. Value can be added through special techniques, craftsmanship, and the type and quality of raw materials. Entering the European market means you need to comply with the European Union's mandatory (legal) requirements, as well as any additional or niche requirements your buyers may have.

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1. What requirements must bed textiles comply with to be allowed on the European market?

The following requirements apply to bed textiles on the European market. For a more detailed overview, see our study on [buyer requirements for Home Decorations and Home Textile \(HDHT\)](#).

What are mandatory requirements?

When exporting to Europe, you must comply with the following legal requirements:

- General Product Safety Directive
- REACH
- Textile Regulation
- Packaging and Packaging Waste Directive

General Product Safety Directive

Europe's [General Product Safety Directive](#) is a framework legislation, stating that all products marketed in the European Union must be safe to use. If there are no specific legal requirements established for your product and its use, the General Product Safety Directive still applies. If specific requirements do apply, the Directive applies in addition to those, covering additional safety aspects that may not have been described specifically.

Unsafe products are rejected at the European border or withdrawn from the market. The European Union has introduced a rapid alert system ([Safety Gate](#)) to list such products.

Tips:

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

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

Check the [Safety Gate alerts](#) for bed textiles for an idea of what issues may arise. Examples are prohibited chemicals or long cords that could lead to strangulation.

Restricted chemicals: REACH

The [REACH regulation](#) (EC 1907/2006) lists restricted chemicals in products that are marketed in Europe. For example, REACH restricts the use of azo dyes in textile products. If you dye (the materials for) your products, make sure you do not use certain [azo dyes](#) that release any of the 22 prohibited aromatic amines. Be aware that the legislation lists the aromatic amines, not the azo dyes that release them.

REACH also restricts the use of certain flame retardants in textiles, including Tris (2,3-dibromopropyl) phosphate (TRIS), Tris (aziridinyl) phosphine oxide (TEPA) and polybrominated biphenyls (PBB). These chemicals are prohibited in products intended to come into contact with the skin.

Since November 2020, new limits apply for 33 [CMR substances](#) (substances that are carcinogenic, mutagenic or toxic for reproduction). These limits affect textiles such as bedspreads and duvets. They are listed in [entry 72 of Annex XVII](#) and include substances such as formaldehyde, heavy metals and benzenes. In general, the maximum concentration is 1 mg/kg, but there are exceptions.

Tips:

Make sure you comply with the restrictions for the use of chemicals as laid down in the REACH regulation.

If you dye your products, make sure they do not contain any of the azo dyes that release the forbidden aromatic amines. This includes checking your own suppliers and asking for certified azo-free dyes.

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

Familiarise yourself with the full list of restricted substances in products marketed in Europe via the [Access2Markets](#) platform.

For useful information and tips from the European Chemical Agency (ECHA), see for instance [REACH Annex XVII](#) (a list of all restricted chemicals), [Information on REACH for companies established outside Europe](#) and [Questions & Answers on REACH](#).

Textile Regulation

The European [Textile Regulation](#) states that textile products need to be labelled or marked. Its purpose is to make sure that consumers within the European Union know what they are buying. The regulation applies to all products that contain at least 80% (by weight) of textile fibres. It requires textile products to have a label that

states the full fibre composition of the product and, if applicable, the presence of non-textile parts of animal origin. The label should be durable, easily legible, visible and accessible. It should also be printed in all the official national languages of the European countries the product is sold in.

There is no European Union-wide legislation on the use of symbols for washing instructions and other care aspects of textile articles. Because consumers do consider care instructions to be important information on a product label, you are advised to follow the [ISO 3758:2012](#) standards on the care labelling code using symbols for textiles.

Tips:

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

Know your own product and study the European labelling rules to find out how it should be labelled in Europe. 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 with it. Find out more about [textile labelling rules](#) from Access2Markets.

Packaging legislation

Europe has specific [packaging and packaging waste legislation](#). EU [Directive 94/62/EC](#) aims to prevent or reduce the impact of packaging and packaging waste on the environment. Buyers may therefore ask you to minimise the use of packaging materials (paper, carton, plastic) or to use, for example, recycled materials.

Europe also has [requirements for wood packaging materials](#) (WPM) used for transport, such as:

- packing cases
- boxes
- crates
- drums
- (box) pallets
- dunnage

All wood packaging material and dunnage from non-European Union countries must be:

- heat treated or fumigated in line with International Standards for Phytosanitary Measures ([ISPM15](#))
- marked with the ISPM15 stamp and the [IPPC logo](#)
- debarked

These requirements do not apply to:

- wood 6mm thick or less
- wood packaging material made entirely from processed wood produced using glue, heat and pressure such as plywood, oriented strand board and veneer
- wood packaging material used in trade within the European Union

The objective is to prevent organisms that are harmful to plants or plant products from being introduced into and spreading within the European Union. It also regulates imports from third countries in line with international plant health standards. Keep this in mind when you decide on the packaging of your bed textiles.

Tips:

For more information, see the European Union's [wood packaging material factsheet](#).

Get familiar with the [ISPM15 procedure](#). Check out the [Frequently Asked Questions](#) and the [explanatory document](#).

What additional requirements do buyers often have?

Sustainability

Social and environmental sustainability make your products stand out on the European market. Think of sustainable raw materials and production processes, as well as the impact your company has on the environment, the wellbeing of your workers and society as a whole. Buyers appreciate a good story to create an emotional connection with their customers.

Nowadays, an increasing number of European buyers would like you to comply with the following 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 is 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 that make or grow consumer goods.
- [Sedex](#): this membership organisation strives to improve working conditions in global sourcing chains. It offers a collaborative platform where you can share information on your ethical and labour standards with (potential) buyers, based on a Self-Assessment Questionnaire (SAQ).

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.

In the home textiles industry, organic cotton is becoming an increasingly popular sustainable option. Although this is not (yet) a mainstream requirement, you can study your options for certification from [The Global Organic Textile Standard \(GOTS\)](#). The easiest way to use certified organic cotton is by either sourcing certified yarn or, if you do not weave yourself, certified organic cotton fabric.

In 2020 the European Commission adopted the [Circular Economy Action Plan](#) as a main building block of the [European Green Deal](#). The action plan includes the intention to launch a new Strategy for Textiles in 2021. The goal of this strategy is to strengthen competitiveness and innovation in the sector, boosting the European market for sustainable and [circular textiles](#).

This increasing importance of sustainability is reflected in a recent Maison et Objet Barometer, where [62% of HDHT retailers have noticed growing interest from their customers in ethical products](#). They indicate that 92% of their customers think natural materials are (very) important, 77% value socially responsible production methods, and 71% care about recyclable/recycled materials.

Tips:

Optimise your sustainability performance. Reading up on the issues included in the initiatives, such as

[BSCI](#) and [ETI](#), will give you an idea of what to focus on.

If you can show your sustainability performance, this may be a competitive advantage. For instance with a self-assessment like the [BSCI Self-Assessment for Producers](#) and [Sedex' SAQ](#), or a code of conduct such as the [ETI base code](#).

Check out the [Circular Economy Action Plan](#) for details on the planned Strategy for Textiles.

For more information, see our special study on [sustainability](#) and our webinar on [the sustainable transition in apparel and home textiles](#).

Labelling

The information on the outer packaging of bed textiles should correspond to the packing list sent to the importer. The external packaging labels should include:

- producer name
- consignee name
- quantity
- size
- volume
- caution signs

The most important information on the product labels of bed textiles is composition, size, origin and care labelling. Your buyer will further specify what information they need on the product labels or on the item itself, such as logos or 'made in...' information. This is part of the order specifications. It is common in Europe to use [EAN or barcodes](#) on the product label. For more information, please refer to the labelling-specific rules under the Textile Regulation in the chapter above.

Packaging specifications

Importer specifications

You should pack bed textiles according to the importer's instructions. They have their own specific requirements for using packaging materials, filling boxes, palletising, and stowing containers. Always ask for the importer's packaging specifications, which are part of the purchase order. Packaging usually consists of plastic wrapping to protect the fabric from water, solar radiation and staining.

Damage prevention

Proper packaging minimises the risk of damage through dirt, temperature or humidity. Packaging should ensure the items inside a cardboard box cannot damage each other. It should also prevent damage to the boxes when they are stacked inside the container. Packaging therefore usually consists of an outer cardboard box lined with protective material like plastic wrapping. The actual products are usually packed in polybags, either individually or in relatively small numbers, depending on the size of the product.

Dimensions and weight

Packaging must be easy-to-handle in terms of size and weight. Standards are often related to labour regulations at the point of destination, specified by the buyer.

Cost reduction

Boxes are usually palletised for air or sea transport, and you have to maximise the use of pallet space. While

packaging has to provide maximum protection, you must also avoid using excess materials or shipping 'air'. Waste removal is a cost to buyers.

You can reduce the amount and diversity of packaging materials by:

- partitioning inside the boxes, using folded cardboard
- matching inner and outer boxes by using standard sizes
- considering packing and logistical requirements when designing your products
- asking your buyer for alternatives

Material

Importers are increasingly banning wooden crating and packaging due to its unsustainability and high material and disposal costs. Economical and sustainable packaging materials are more popular. Using biodegradable packaging materials can be a market opportunity. For some buyers, it can even be a demand.

Consumer packaging

Bedspreads and duvet covers are usually displayed in stores without any packaging. In general, consumer packaging can be simple in design, like simple paper or plastic wrapping. However, in the high-end and middle-high segments, bed textiles often come in well-designed (gift) packaging like a luxurious box with paper wrapping around the product inside. The consumer packaging also provides space to explain more about the product's qualities.

Tips:

Always ask the importer's order specifications, packaging and labelling requirements.

See [Packaging Europe](#) for more information on the latest packaging developments, including regular news articles about biodegradable packaging.

Payment terms

Payment terms are usually agreed upon with the buyer in the order contract. They vary from buyer to buyer and are related to the volume and value of the order, the type of distribution partner, whether or not an agent is involved, and what delivery terms apply.

Delivery terms, officially known as Incoterms, depend on the type of distribution partner and their preferences regarding physical distribution. Importers generally prefer Free On Board (FOB) or Free Carrier (FCA) arrangements.

FOB is restricted to goods transported by sea or inland waterway. It means that the seller pays for transportation of the goods to the port of shipment, plus loading costs. The buyer pays the cost of marine freight transport, insurance, unloading, and transportation from the arrival port to the final destination. FCA can be used for any transportation mode. In this type of arrangement, the seller fulfils his obligation to deliver when he has handed over the goods, cleared for export, into the charge of the carrier named by the buyer at the specified place or point.

Retail multiples can ask for Cost Insurance Freight (CIF). That means that they will ask you to include the shipping and insurance charges in your quotation. Small retailers may go a step further and ask you to arrange

that the goods be delivered to their doorstep via a Delivered Duty Paid (DDP) arrangement. For importers who consolidate orders in your country, Ex Works (EXW) terms are often best.

Tips:

For a more elaborate overview of the various terms and conditions, how to work with them, and the benefits of having your own, see our study on [terms and conditions](#).

Study the different types of [Incoterms](#), including what your and your buyer's rights and obligations are.

What are the requirements for niche markets?

Fair trade

According to the World Economic Forum, [86% of people want significant change to make the world fairer and more sustainable after COVID-19](#). The concept of fair trade supports fair pricing and improved social conditions for producers and their communities. Especially if the production of your bed textiles is labour intensive, fair-trade certification can give you a competitive advantage. Common fair-trade certifications are issued by the [World Fair Trade Organisation](#) (WFTO) and [Fair for Life](#).

Figure 1: West Elm – Fair-trade flax linen bed textiles

Source: [West Elm @ Youtube](#)

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.

If certification is not feasible, work according to [fair-trade principles](#) without being officially guaranteed or certified. Carefully document your company processes so you can support your story.

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

Sustainable textile certification

While sustainability is gaining ground, the actual use of certification is still not common in this sector, apart from organic certifications that are becoming widespread. As this is a means of demonstrating sustainability, there is an increasing interest from buyers.

Several eco-labels are used for textiles:

- The [Global Organic Textile Standard \(GOTS\)](#) is a textile-processing standard for organic fibres. It ensures environmental and social responsibility throughout the production chain of textile products.
- [OEKO-TEX](#) Standard 100 certification guarantees that no hazardous chemicals are used in the production of textiles. It provides textile and clothing companies with more transparent supplier relationships and facilitates the flow of information regarding potential problematic substances.
- The European Union's [Ecolabel](#) seeks to minimise products' environmental impact by looking at the use of environmentally friendly chemical options. The label is awarded only to products with the lowest environmental impact in a product range.
- The voluntary [Nordic Swan eco-label](#) is used for textile products in Sweden, Norway, Finland, Denmark and Iceland.

Figure 2: Care By Me – GOTS-certified organic cotton bed textiles

Source: [Care By Me @ YouTube](#)

Tips:

Check the possibility of sourcing organic cotton. Textile products that contain a minimum of 70% organic fibres can become [GOTS certified](#). The easiest way is to use certified organic cotton yarn if you are weaving the fabric yourself, or certified organic cotton fabric if you are in CMT (Cutting Making Trimming) only.

Read more about [GOTS](#), [OEKO-TEX](#) and the European Union's [Ecolabel](#) in the [ITC Standards Map](#).

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

Woolmark

Woolmark certification provides consumers with guaranteed wool fibre content and an assurance of quality. It contains specific standards for several product groups, including bedspreads.

Tip:

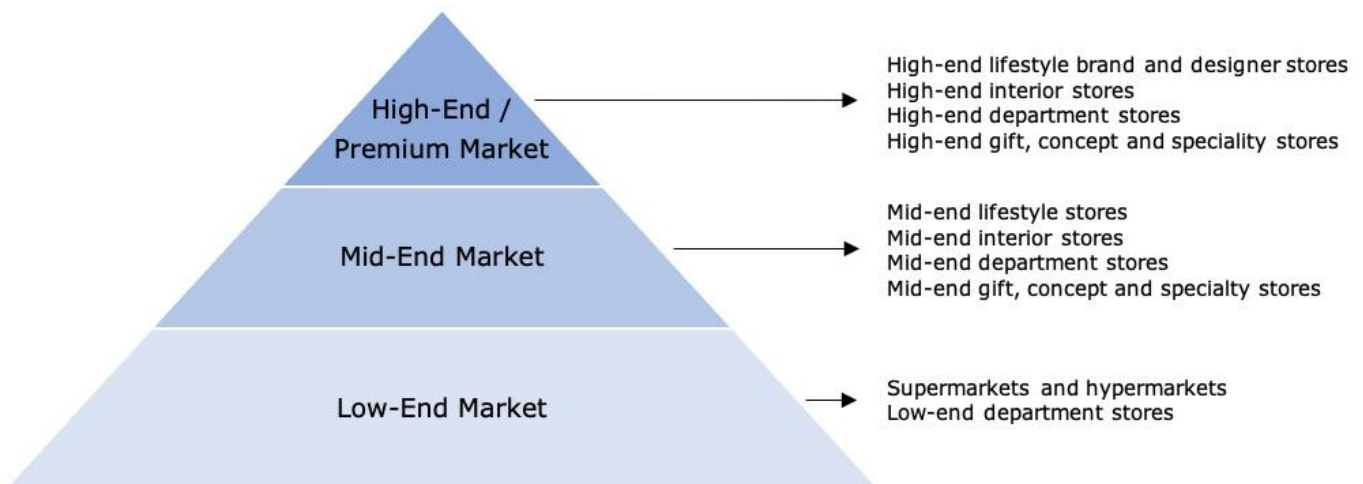
If you supply woollen products, study [how to become Woolmark-certified](#).

2. Through what channels can you get bed textiles on the European market?

The European bed textiles market is segmented into low, mid and high-end (premium) segments. The items are put on the market through the traditional channels: importers/wholesalers that supply to retailers, as well as retailers that buy directly from suppliers.

How is the end market segmented?

Figure 3: Bed textiles market segmentation in Europe



Low-end market

In the low-end segment, simple and inexpensive bed textiles are common. Products are generally made of man-made fibres such as polyester, or blends such as microfibre. Sometimes man-made fibres are blended with cotton, but hardly any bed textiles in this segment are made of 100% natural fibres. Typical retailers include low-end department stores such as [Zeeman](#).

Cheap mass production from Pakistan generally dominates this market and is almost impossible to compete with. Instead, the higher mid-end offers you, as a small or medium-sized enterprise (SME) from a developing country, the most opportunities.

Mid-end market

In the middle segment, bed textiles are more fashionable, following trends mainly through design and colour. [Zara Home](#) and [Habitat](#) are important players.

Figure 4: IKEA - Bed textiles with forest-inspired print

Source: [Dream of the Scandinavian forest @ You Tube](#)

At the higher end of the mid-market segment, craftsmanship, natural or sustainable values and branding play a larger role. This mid-high segment offers you the most opportunities. To appeal to these consumers, you can add value to your bed textiles through handmade craftsmanship.

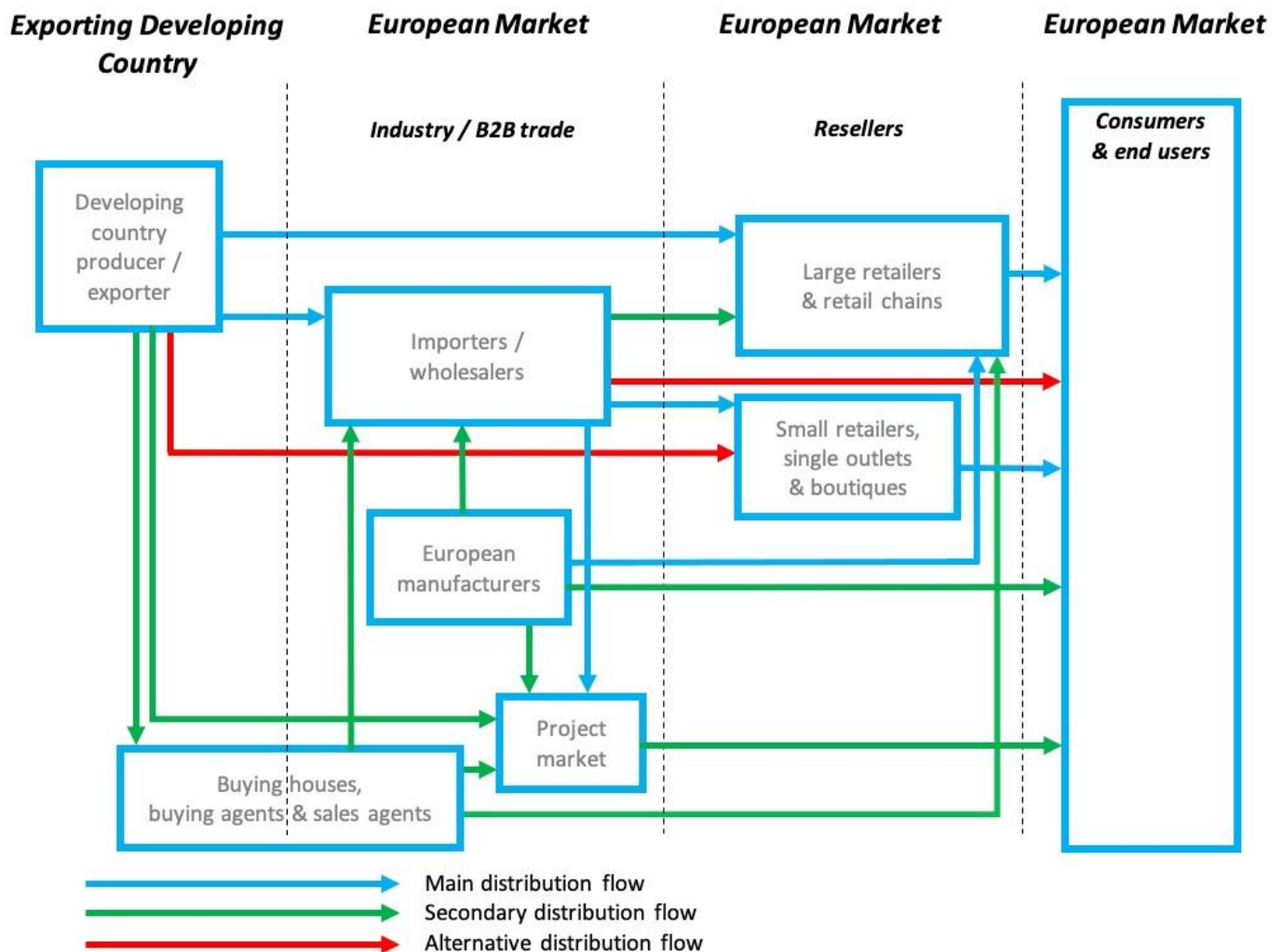
High-end / premium market

In the high-end (premium) segment, designer quality is common and private labels are the standard. The emphasis is on excellent quality, both of the raw materials and the finish. The finish is often done by hand, using traditional techniques. Luxury department stores such as [Harrods](#) play an important role here.

Through what channels do bed textiles end up on the end-market?

The channels through which bed textiles are put on the market follow the traditional patterns: import takes place via importers/wholesalers that supply to retailers. Larger retail chains often bypass the importers/wholesalers and import themselves, while more and more smaller retailers have also started buying directly from the supplier. In some cases, buying agents play a role. Below, the main actors in the market for bed textiles are highlighted.

Figure 5: Trade channels for bed textiles in Europe



Importers/wholesalers

Importers/wholesalers sell products to retailers in their own country or region, or re-export to the broader European continent. Some European markets are therefore supplied by wholesalers/importers from other European countries (internal European trade). Supply to buyers in the project market (such as hotels and spas) can be considered as a secondary distribution flow for European importing wholesalers.

These importers/wholesalers take care of the import procedures. They take ownership of the goods when they buy from an exporter (as opposed to agents), taking on the risk of the onward sale of the products. Developing a long-term relationship can lead to a high level of cooperation on appropriate designs for the market, new trends, use of materials, type of finishing and quality requirements.

Importing retailers

Retailers come in many sizes: large and part of a chain, or small and independent. Especially larger retail chains often import directly from their suppliers in developing countries. Many, such as IKEA, even have their own buying offices in developing countries. Others, mainly the smaller independent stores, order in Europe from wholesalers.

There is a tendency for consolidation in European retail. Large retail brands are becoming more widespread in Europe and more 'lifestyle-centred', offering home decoration and textiles as well as fashion accessories and furniture.

Buying agents, buying houses and sales agents

You can encounter several types of intermediaries in your dealings with European buyers. In your own country there may be buying houses, and in Europe there are both buying and sales agents.

European buying agents represent European buyers in sourcing countries. They act as intermediaries, meaning they do not import products themselves. Sometimes agents have a more limited role, such as checking the quality of the products in your warehouse on behalf of a specific importer or checking the codes of conduct that you have agreed on with your buyer. Buying agents can work individually or as part of purchasing companies.

Buying houses are comparable to buying agents, but they are based in your country and usually have a broader spectrum of services. This can range from raw material sourcing to design and sampling services.

European sales agents can represent you in helping to find buyers in the European market. However, you should be careful before entering into (exclusive) agreements with them, as [European legislation is quite protective when it comes to the position of commercial agents](#).

Agents and buying houses mostly operate based on commission. They may approach you directly, or your (potential) buyer could indicate they prefer working through an intermediary. However, if possible, working directly with a buyer is preferable. This saves on commission and allows you to communicate directly with the buyer.

E-commerce

E-commerce in the HDHT sector is increasing and can help you reach a broader range of customers. However, it is important to understand that for most producers this is not a completely separate channel in itself and that catering to buyers that sell online does not differ from your regular business. Retailers often combine online and offline channels but the way of supplying them is the same. Companies that only sell online also need to take stock before they can sell.

Channelling online sales via your own website would mean:

- supplying small batches/individually packaged items, and being prepared to pre-stock and offer more just-in-time supply concepts
- needing to be found in a crowded space of European and producer country wholesalers and retailers that are ahead of the game in understanding and responding to online consumers' needs
- being able to deal with aftersales on a business-to-consumer (B2C) level, including returns and replacing items

Because of this, selling online to consumers in Europe is not feasible for most exporters from developing countries.

Tips:

To find potential buyers, search the list of exhibitors or attend the main (online) trade fairs in Europe: [Ambiente](#) - Frankfurt (February), [Heimtextil](#) - Frankfurt (January), and [Maison et Objet](#) - Paris (January and September).

Search the member lists of relevant industry associations to find potential buyers, such as [EURATEX](#) (European Apparel and Textile Confederation).

See our [tips for finding buyers](#) on the European HDHT market.

What is the most interesting channel for you?

Wholesale importers are the main channel between exporters in developing countries and European retailers. They are interesting if you want to develop a long-term relationship and they usually have good knowledge of the European market. They can provide you with valuable information and guidance on European market preferences.

However, as the market is becoming more and more competitive, large retailers are increasingly importing for themselves instead of through European wholesale importers. The obvious advantages are cutting out the margins of the wholesaler and reducing delivery time to the market. In the lower-end market segments, the self-importing retailers might want to drive a much harder bargain with you. However in the mid-high segment, which offers you the most opportunities, price is less of an issue.

Smaller, independent European retailers continue to purchase mainly from domestic wholesalers/importers. As in other European market sectors (such as food or clothing), independent HDHT retailers struggle to compete with retail chains. They need to differentiate on value-added service, as well as specialised offers and authenticity. These buyers typically prefer small order quantities per item, small total order volumes and delivery to their doorstep, with a limited likelihood of repeat orders. You need to calculate if this is cost-effective for you.

The trend of direct sourcing is expected to continue in the future and may create more opportunities for you. The pool of buyers may increase if more retailers become importers, possibly resulting in an improvement of your bargaining position. Importing retailers order for their own shops and can therefore place orders much more quickly than some importers/wholesalers, who may first need to show samples to their retailers before exporters receive their orders.

Tips:

Consider targeting retailers directly to improve your bargaining position and increase your chances of closing deals faster.

Relate your offer and terms to the targeted retailer (large/small). Ask your existing buyers how they operate if you are unsure. The better informed you are about this aspect, the better you will be able to set prices.

For more information on the pros and cons of dealing directly with smaller retailers, read our study on [alternative distribution channels](#).

Offer suitable services such as fast delivery and after sales support to build a relationship based on mutual benefits.

When you participate in international trade fairs, especially in Europe, make sure that you have a policy for small, independent retailers coming to your booth. If you choose to sell to them, you must have appropriate terms of trading, such as low minimum order quantities, delivery to the doorstep of the retailer or pre-stocking.

3. What competition do you face on the European bed textile market?

Europe's leading suppliers of bed textiles include Pakistan and China. A large part of this supply consists of mass-produced items for the lower-end segments. Instead of competing with these manufacturers, your best opportunities are in the mid to high-end market, where you can add value.

Pakistan is Europe's main bed textiles supplier, with a direct import market share of 31%. Germany follows with 11%, and China and Turkey with 10% each. Poland (4.7%) and India (4.1%) are next on the list.

Be aware that European countries have different roles on the market. You can make a rough distinction between countries that are mainly importers and countries that are mainly manufacturers. Western European countries are mainly importers and re-exporters. Most Western European importers do not just sell their products in their own country, but they distribute them across the continent.

European production mainly takes place in Eastern European countries, mostly because of their proximity and their relatively low labour costs. This can make them a good alternative for sourcing low to mid-end products. Western and Southern European countries also produce some high-end products from well-known premium brands with a long history.

Mass-produced bed textiles are segmented in the lower ends of the market and produced in the most cost-effective country. You do not compete with these countries, as your best chances are in the mid to high-end market.

Which countries are you competing with?

Pakistan is a key player in cotton

After a relatively modest decrease of -2.4% in 2020, Pakistan continues to be Europe's main supplier of bed textiles. Between 2016 and 2020, the country realised an overall 2.2% average annual increase per year. This resulted in €1.3 billion worth of bed textile exports to Europe in 2020, and a fairly stable direct import market share.

Pakistan has access to a large and cheap workforce. It is one of the world's leading cotton producers and has a large spinning capacity to produce textile products. This makes Pakistan a high-volume, low-pricing sourcing hub, and gives the country a clear competitive edge in the production of cotton bed textiles. Pakistani producers also have the wider power looms that are required for efficiently manufacturing larger-width items. To compete, you should appeal to the mid-high segment and differentiate by focusing on quality, design and sustainability.

China supplies the lower-end market

After fluctuating between 2016 and 2019, Chinese bed textile supplies to Europe fell by -8.2% to €427 million in 2020. This resulted in an overall average annual decline of -0.9% for 2016-2020, meaning China has let some of its market share slip.

Its low-cost workforce, availability of raw materials and efficient shipping to Europe compared to other Asian countries make China the most competitive supplier. However, the cost of labour in China has also steadily increased in the last ten years, which has affected China's price competitiveness. In the coming years, disruptions following China's trade war with the United States and the COVID-19 pandemic may also negatively impact the country's trade performance. This could benefit companies from other developing countries.

Chinese producers mainly supply the lower ends of the market with low-priced products, as product development and creativity are not their core strengths. To avoid having to compete with Chinese suppliers on costs, you should differentiate and stay away from mass-produced items.

Turkey benefits from its central location

Between 2016 and 2018, Turkey's bed textile supplies to Europe were in decline. Since 2019 however, they seem to be back on track. After a 4.9% increase in 2020, they reached €407 million. This translates to an average increase of 0.6% per year for 2016-2020.

Turkey offers a low-cost workforce and a convenient location close to the European market, allowing for relatively easy and affordable transport. This makes manufacturing locations in Turkey more attractive, primarily based on cost and lead times.

Poland strengthens its position as a regional supplier

As an Eastern European country, Poland benefits from its closeness to the Western European market. This allows suppliers to offer short delivery times, while at the same time, labour in Poland is relatively affordable compared to Western Europe. Suppliers have a good understanding of the European consumer and have well-established and efficient production lines. In addition, products that are 'Made in Europe' are increasingly popular.

These advantages have helped Poland to quickly increase its bed textile exports to Europe in recent years, even in 2020, when the country's supplies grew by an impressive 27% to €199 million. As a result of this strong performance, Poland's share in the European bed textile import market has grown from 3.7% in 2016 to 4.7% in 2020.

India lets some of its market share slip

India recorded a particularly large drop in bed textile supplies to Europe. A decline of -17% in 2020 translated into €172 million worth of bed textile exports and an average annual decrease of -5.4% between 2016 and 2020. As a result, India's direct share of the European market decreased from 5.1% in 2016 to 4.1% in 2020.

India offers skilled labour and transport at relatively low costs. As one of the biggest cotton producers in the world, manufacturers have direct access to high-quality cotton at relatively low prices. In addition, the Indian government's recent efforts to reach out to the leading nations in the world have resulted in strong bilateral trade relationships. Nevertheless, the COVID-19 pandemic has greatly affected Indian bed textile exports to Europe.

Bangladesh faces strong competition

After peaking in 2017, Bangladeshi supplies fell by -8.4% in 2020 to €156 million. This resulted in an overall average annual decline of -3.4% for 2016-2020.

Bangladesh' main selling points are its reasonable prices and a large skilled workforce. Importers generally perceive the country as fairly accessible and customer oriented. However, Bangladesh does not have local access to cotton and competition from neighbouring countries India and Pakistan is strong. In addition, freighting can be relatively expensive. Because the Bay of Bengal is shallow, ships to Europe have to make a detour via Colombo. The damage to Bangladesh' reputation from previous safety issues in the textile sector also poses a challenge.

Which companies are you competing with?

Sarita Handa - India

Indian company [Sarita Handa](#) targets the (lower) high segment. It capitalises on the quality of its materials and finish ("100% cotton, so your skin can breathe and you can be comfortable" / "smooth, yet sturdy craftsmanship"), as well as on the design content that derives a lot of its strength from the use of special techniques. In this sense it is a good example of a company that focuses on more long-term trends and quality on several levels. Sarita Handa sells both 'off the shelf' products and bespoke textiles.

Linen Me - Lithuania

[LinenMe](#) from Lithuania focuses on linen as its main raw material, especially emphasising the quality and special characteristics of linen. The company's bed textiles are "crafted from prewashed 100% European linen. The deliciously soft fabric is not only a joy to touch but it's easy to care for too. It is machine washable and there's

no need for ironing as its real beauty lies in its natural crumples”.

Notably, the design content is low when it comes to pattern and the use of special techniques. The emphasis is on the characteristics of the raw material and the fact that a wide variety of colours (30!) is available. This makes LinenMe an example of a company that has a strong focus on a limited number of product aspects, as opposed to producers that have a wide range of different products, materials and techniques.

Barine - Turkey

Turkish [Barine](#) produces bed textiles made of cotton and linen/cotton-blends. Their Serenity Collection mainly comes in plain colours, focusing on “effortless elegance and casual style”. Other styles showcase techniques such as waffle and muslin weaves, also in plain colours. The more expressive designs are reserved for a range of decorative cushion covers and throws that can be used in combination with the relatively neutral bed textiles. These accessories feature various types of patterns, tassels, techniques and materials, designed to “add stylish nuances”.

Barine’s website offers fairly limited company information. The blog discusses the company’s OEKO-TEX certification and sustainable efforts, including minimising waste at all stages of production and using simple and environmentally friendly product packaging. Such key topics deserve to be highlighted on the homepage and/or a dedicated webpage.

Which products are you competing with?

Because ‘bed textiles’ comprise a lot of different products that combine both practical and decorative purposes, most competition comes from products within the same group. Some consumers may opt for a cheaper duvet cover and use a more expensive throw to add a decorative element to the bedroom. Others, who like a simpler and more sophisticated look, could go for a high-end duvet cover of excellent material and finish.

For decorative purposes, there is competition from throws. From the practical side (bed textiles to keep warm), there is competition from blankets.

Tips:

Compare your products and company to the competition. You can use [ITC Trademap](#) to find exporters per country and compare on market segment, price, quality and target countries.

To differentiate from your main competitors, focus on design, craftsmanship, quality and the story behind your products.

For more information on competing products, see our study on [blankets and throws of natural fibres](#).

4. What are the prices for bed textiles on the European market?

Prices for bed textiles vary across market segments, ranging from low-end to high-end. After adding logistics costs, wholesaler and retail margins and Value Added Tax (VAT), European consumer prices amount to about 4-6.5 times your selling price.

Table 1 gives an overview of the indicative prices of bed textiles in the low, mid and high-end market segments. ‘Indicative’ is key here, since prices vary depending on technique, size, material, design, brand and other ways of value addition, including a strong sustainable concept.

Table 1: Indicative average consumer prices of bedspreads and duvet covers in Europe

	Low-end	Mid-low	Mid-high	High-end / premium
Bedspreads	€10 - €20	€20 - €40	€40 - €125	€125 or more
Duvet covers	€10 - €30	€30 - €50	€50 - €150	€150 or more

Consumer prices depend on the value perception of your product in a particular segment. This is influenced by your marketing mix:

- product benefits
- promotion (brand or not, communication of product benefits)
- points of sale (reseller positioning)
- price

The European consumer price of your bed textiles is around 4-6.5 times your selling (FOB) price. Besides energy, labour and transport costs, FOB prices depend heavily on the availability and cost of raw materials. For example, the average price 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.

The following percentages give an indication of a price breakdown for bed textiles (bedspreads and duvet covers) in the supply chain:

- shipping, import, handling costs: +15-20%
- wholesaler: +50-90%
- retail: +90-150%
- VAT*: +20%

*VAT percentages in Europe range from 18% in Malta to 27% in Sweden. On average, these percentages are around 20%.

For example, in Table 2 the FOB price is set at €10.00. Depending on the market segment your product is designed for, the consumer price ranges from €41.00 in the low-end market to €65.50 in the high-end market.

Table 2: Example of the price breakdown per market segment

	Low margin	Middle margin	High margin	
FOB price	€10.00	€10.00	€10.00	Your FOB price
Transport, handling charges, transport insurance, banking services (20/15/15%)	+2.00 €12.00	+1.50 €11.50	+1.50 €11.50	Landed price for the wholesale importer

Wholesalers' margins (50/75/90%)	+6.00 €18.00	+8.60 €20.10	+10.40 €21.90	Selling price from the wholesale importer to the retailer
Retailers' margins (90/110/150%)	+16.20 €34.20	+22.20 €42.30	+32.70 €54.60	Selling price excluding VAT from the retailer to the end consumer
Selling price incl. VAT (20%)	+6.80 €41.00	+8.50 €50.80	+10.90 €65.50	Selling price including VAT from the retailer to the end consumer

The FOB price of €10 includes your own margins as a producer. These margins depend on your efficiency and price setting. Generally, margins in the lower segment, which deals with high volumes for low prices, are smaller than those in the middle and higher segments.

Some examples of prices of bed textiles across Europe are:

- Recycled polyester bedspread, [IKEA](#), €29.00
- Hand-block-printed bedspread, [West Elm](#) (the United Kingdom), about €160.00
- GOTS and OEKO-TEX-certified duvet cover set, 200x220 cm, [Essenza Home](#) (the Netherlands), €189.95
- Hemp duvet cover set, 200x200 cm, [Avocadostore](#) (Germany), €305.00

Tips:

Study consumer prices in your target segment to determine your price and adjust your cost accordingly. The quality and price of your bed textiles must match what is expected in your chosen target segment.

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

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

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

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