

# Entering the European market for table and kitchen linen

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The European table and kitchen linen market offers opportunities, but competition is strong. The middle/higher-middle segments are your best options, as mass-producing countries dominate the lower-end market. You can add value through special techniques and materials, sustainable values, and storytelling. You need to meet mandatory (legal) requirements, as well as any additional requirements your buyers may have.

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## 1. What requirements must table and kitchen linen meet to be allowed on the European market?

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

### What are the mandatory requirements?

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

- General Product Safety Directive/Regulation;
- Restricted chemicals: REACH;
- Intellectual property rights;
- Textile Regulation;
- Packaging legislation; and
- Upcoming sustainability legislation.

### General Product Safety Directive/Regulation

According to the [General Product Safety Directive](#) (GPSD, 2001/95/EC), all non-food products marketed in the European Union (EU) must be safe for use. In 2023, the [European Council adopted a new regulation](#) to replace the GPSD. This [General Product Safety Regulation](#) (GPSR, EU 2023/988) will ensure that products in the EU, whether sold online or in traditional shops, meet the highest safety requirements. It came into force in June 2023 and will apply from December 2024 onwards.

Unsafe products are rejected at the European border or withdrawn from the market. The EU uses the [Safety Gate](#) system to list and share information about such products.

#### Tips:

Read more about the new [GPSR](#).

Make sure to comply with the GPSR by December 2024.

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

Search the [Safety Gate alerts](#) for table and kitchen linen to get an idea of potential issues.

## Restricted chemicals: REACH

The [REACH](#) regulation (EC 1907/2006) lists restricted chemicals in products that are marketed in Europe.

Restricted chemicals in the production of textiles include:

- [Azo dyes](#) that release [prohibited aromatic amines](#); and
- Certain flame retardants, such as TRIS, TEPA and PBBs.

#### Tips:

Comply with the restrictions as laid down in [REACH](#).

Do not use azo dyes that release prohibited aromatic amines. Also check that your suppliers adhere to this and ask them for certified azo-free dyes. Be aware that the legislation lists the aromatic amines, not the azo dyes that release them.

Follow developments in the field of flame retardants, for instance through [pinfa](#).

For information and tips from the European Chemical Agency (ECHA), see, for instance, its [list of all restricted chemicals](#) (REACH Annex XVII), [information for non-EU companies](#) and [questions & answers](#).

## Intellectual property rights

When you develop products, make sure not to copy an existing design. [Intellectual property \(IP\) is protected in Europe](#), and products that violate IP rights are banned from the market. The European Commission's [IP action plan](#) gives European companies easier access to fast, effective and affordable protection tools.

#### Tips:

For more information, visit the websites of the [European Union Intellectual Property Office \(EUIPO\)](#) and the [World Intellectual Property Office \(WIPO\)](#).

Keep track of developments via the [state-of-play of the implementation of the key actions](#) in the IP action plan.

## European Green Deal

The [European Green Deal](#) provides a legal aspect to social and environmental sustainability. This includes the [Circular Economy Action Plan](#) and the [EU Strategy for Sustainable and Circular Textiles](#). The goal is to ensure that, by 2030, textile products placed on the European market are:

- Durable, repairable and recyclable;
- To a large extent made of recycled fibres;
- Free of hazardous substances; and
- Produced respecting social rights.

In this context, many European laws are under revision and new legislation is being developed. Some of this legislation will apply to you directly, and some indirectly via your buyers. Particularly relevant proposals for the textile industry include:

- Revision of the Textile Regulation;
- Packaging and Packaging Waste Regulation;
- Ecodesign for Sustainable Products Regulation;
- Corporate Sustainability Due Diligence Directive;
- Forced Labour Regulation; and
- Green Claims Directive.

## Textile Regulation

The EU's [Textile Regulation](#) (1007/2011) states that textile products must be labelled or marked. This applies to products containing  $\geq 80\%$  textile fibres. These products must have a label stating their full fibre composition and, if applicable, the presence of non-textile components of animal origin. The label must be durable, easily legible, visible and accessible. It should be printed in all official national languages of the European countries where the product is sold. The European Commission plans to revise the regulation in 2024.

There is no EU-wide legislation on symbols for washing instructions and other care aspects of textile items. To give consumers clear information, you should follow the ISO 3758:2023 standard for [graphic symbols in care labelling](#).

### Tips:

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

Know your products and how they should be labelled. Find out more about [textile labelling rules](#) from Access2Markets.

Stay updated on the [revision of the Textile Regulation](#).

## Packaging legislation

The [Packaging 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 and/or to use sustainable (recycled) materials.

According to the [Circular Economy Action Plan](#), all packaging on the European market should be reusable or recyclable in an economically viable way by 2030. To help achieve this, a new Packaging and Packaging Waste Regulation (PPWR) is in the works.

Europe also has [requirements for wood packaging material and dunnage](#) (WPM) used for transport, such as packing cases and pallets. The goal is to prevent organisms that are harmful to plants or plant products from entering and spreading within the EU.

Tips:

For more information, check the EU's [packaging and packaging waste legislation](#) and [wood packaging material factsheet](#).

Stay updated on the [proposal for a new regulation](#).

## Ecodesign for Sustainable Products Regulation

Key upcoming Green Deal legislation for the textile sector is the Ecodesign for Sustainable Products Regulation (ESPR). In 2022, the [European Commission proposed an ESPR](#) aiming to ensure that products:

- Are designed to last longer;
- Are easier to reuse, repair and recycle; and
- Incorporate recycled raw materials wherever possible.

The proposal restricts single use, tackles the early/premature failure of products and bans the destruction of unsold durable goods. It also includes the introduction of Digital Product Passports with information about products' environmental sustainability, like durability and recycled content.

Tips:

Read more about the [ESPR](#).

See the [questions and answers](#) and [factsheet](#).

Stay updated on the [ESPR's proposed rollout](#).

## Corporate Sustainability Due Diligence Directive and Forced Labour Regulation

Other important upcoming legislation includes the Corporate Sustainability Due Diligence Directive (CSDDD) and Forced Labour Regulation (FLR). In 2022, the [European Commission adopted a proposal for a CSDDD](#). This requires larger companies to identify and prevent, end or reduce any negative impacts of their activities on human rights and the environment, both in the company's own operations and in its value chains. This means that the new rules may apply to you indirectly via your buyers. The [proposed FLR](#) bans products made using forced labour.

As these proposed laws have yet to be finalised, their exact implications are not yet clear. You should nonetheless familiarise yourself with them and prepare for their rollout.

#### Tips:

Read more about the [CSDDD](#).

See the [FLR questions and answers](#) and [factsheet](#).

Stay updated on the proposed [rollout of the CSDDD](#) and [FLR](#).

## Green Claims Directive

Another upcoming law is the Green Claims Directive. In a recent European screening of websites, [many green claims were believed to be exaggerated, false or deceptive](#). Via this 'greenwashing', companies pretend to be doing more for the environment than they really are.

In 2023, the [European Commission proposed a Green Claims Directive](#). The proposal aims to:

- Make green claims reliable, comparable and verifiable;
- Protect consumers from greenwashing;
- Contribute to a circular and green economy; and
- Help establish a level playing field.

#### Tips:

For details, see the [questions and answers](#) and [factsheet](#).

Stay updated on the proposed [rollout of the Green Claims Directive](#).

For help with communicating your sustainable performance honestly and effectively, use the Dutch [guidelines regarding sustainability claims](#) and/or the British [guidance for businesses on making environmental claims](#).

## What additional requirements do buyers often have?

Buyers often have additional requirements for:

- Sustainability;
- Labelling and packaging; and
- Payment and delivery terms.

## Sustainability

Social and environmental sustainability are becoming increasingly important in the European HDHT market, due to buyer and consumer values as well as new Green Deal legislation. Environmental sustainability focuses on your company's impact on the environment, for example via your raw materials and production processes. Social sustainability focuses on your company's impact on the wellbeing of your workers and the community. Key topics include issues like fair wages and safe working conditions. You can highlight your sustainable activities and policies in the 'story' behind your product and company. Buyers appreciate good storytelling that invokes an emotional connection.

## Consumers value sustainability

The increasing importance of sustainability is reflected in a Maison&Objet Barometer, where **62% of HDHT retailers noticed growing interest from their customers in ethical products**. 92% indicated that their customers think natural materials are (very) important, 77% that they value socially responsible production methods, and 71% that they care about recyclable/recycled materials.

In addition to legal compliance, a growing number of European buyers would like you to comply with:

- **Business Social Compliance Initiative (BSCI)**: an initiative of European retailers to improve social conditions in sourcing countries. They expect their suppliers to adhere to the [BSCI Code of Conduct](#).
- **Ethical Trading Initiative (ETI)**: an alliance of companies, trade unions and voluntary organisations. ETI aims to improve the working conditions in global supply chains via their [ETI Base Code of labour practice](#).
- **Sedex**: a membership organisation striving to improve working conditions in global sourcing chains. The [Sedex platform](#) lets you share your sustainable performance, based on a self-assessment.

You can learn about sustainable options from standards like [ISO 14001](#) and [SA 8000](#). However, only niche market buyers demand certification.

Organic cotton is becoming increasingly popular for home textiles. Although this is not (yet) a mainstream requirement, you can explore your options for certification via the [Global Organic Textile Standard \(GOTS\)](#). The easiest way to use certified organic cotton is by sourcing certified organic yarn or fabric.

Adhering to such initiatives and standards may help your buyers comply with the proposed CSDDD and FLR, which require 'proof' of sustainable practices.

### Tips:

Optimise your sustainability performance. Study initiatives like [BSCI](#) and [ETI](#) to learn what to focus on.

Demonstrate your sustainability performance for a competitive advantage. You can use self-assessments like that of the [Sedex platform](#), or a code of conduct like the [ETI Base Code](#).

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

For more information, see our special [study on sustainability in HDHT](#), our [tips to go green](#) and [tips to become socially responsible](#), and our webinars on [sustainability in the European HDHT market](#), [sustainable innovations for your HDHT business](#) and the [sustainable transition in apparel and home textiles](#).

Read more about [BSCI](#), [ETI](#), [Sedex](#) and [SA8000](#) in the ITC Standards Map. You can also conduct a [free online self-assessment](#).

## Labelling

The information on the outer packaging should match the packing list sent to the importer.

Outer packaging labels should include:

- Producer name;
- Consignee name;
- Quantity;
- Size;
- Volume; and
- Caution signs.

The most important information on the product labels of table and kitchen linen 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. In Europe, [EAN or barcodes](#) are commonly used on the product label. For more information, please refer to the labelling-specific rules under the Textile Regulation.

## **Packaging specifications**

### **Importer specifications**

You should pack table and kitchen linen according to the importer's instructions. They have their own requirements for packaging materials, filling boxes, palletisation and stowing containers. Always ask for the importer's order specifications, which are part of the purchase order. Packaging for table and kitchen linen 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 that the items inside a 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 their size.

### **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 and must be specified by the buyer.

### **Cost reduction**

Boxes are usually palletised for transport, and you have to maximise the use of pallet space. Packaging should provide maximum protection, but you must also avoid using excess materials or shipping 'air'. Waste removal is a cost for buyers.

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

- Partitioning inside the boxes, using folded cardboard;
- Considering packing and logistical requirements when designing your products;
- Asking your buyer for alternatives.

### **Material**

Importers are increasingly banning wooden crating and packaging. Economical and sustainable packaging materials are more popular. Using biodegradable packing materials can be a market opportunity. Some buyers may even demand it.

## Consumer packaging

Table and kitchen linens are usually displayed unpacked, making attractive consumer packaging less important. In general, consumer packaging must protect against stains but can be simple in design. However, in the mid-high and high-end segments you should provide consumer packaging matching the design, quality and price of the product.

Gift sets should be attractively packed, for example in an attractive box. In such cases, your buyer will inform you about the requirements.

### Tips:

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

See [Packaging Europe](#) for more information on the latest packaging developments

## Payment and delivery terms

Payment terms are usually confirmed in the buyer's 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, known as [Incoterms](#), depend on the type of distribution partner. HDHT importers generally prefer Free On Board (FOB) or Free Carrier (FCA) arrangements.

### Tips:

Read our [tips to organise your export](#) for more information.

Study the different types of Incoterms, including what your and your buyer's rights and obligations are.

See our [study on terms & conditions](#) for a more detailed explanation of terms and conditions, how to work with them, and the benefits of having your own.

## What are the requirements for niche markets?

Fair-trade practices and sustainability certification are the most common niche market requirements.

### Fair trade

The concept of fair trade supports fair pricing and improved social conditions for producers and their communities. Fair-trade certification can give you a competitive advantage, especially if the production of your items is labour-intensive. It often includes aspects of environmental sustainability too.



Common fair-trade labels are the [World Fair Trade Organization \(WFTO\) Guarantee System](#) and [Fair for Life](#) certification. For most fair-trade oriented buyers in Europe, however, complying with WFTO's [10 principles of fair trade](#) is enough.

#### 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.

Determine which label would be the best fit for you and apply if you can.

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

Read more about [Fair for Life](#) in the ITC Standards Map.

## Sustainable textiles

While sustainability is increasingly common in this sector, the actual use of certification has yet to catch up. However, buyers are becoming more interested in certification to 'prove' their sustainability, especially organic certification.

Popular certifications for home and other textiles are:

- [Global Organic Textile Standard \(GOTS\)](#) - a textile-processing standard for organic fibres that ensures environmental and social responsibility throughout the production chain
- [OEKO-TEX Standard 100](#) - certification that guarantees textile articles are free from harmful substances

OEKO-TEX [Made in Green](#) combines Standard 100 and [STeP](#). Other options include the [Nordic Swan eco-label](#) (in Nordic countries) and the [EU Ecolabel](#).

#### Tips:

Read more about [GOTS](#), [OEKO-TEX Standard 100](#) and [Made in Green](#), and the [EU Ecolabel](#) in the ITC Standards Map.

Explore the possibility of sourcing organic cotton. Textile products containing  $\geq 70\%$  organic fibres can be GOTS-certified. The easiest option is to use certified yarn or fabric.

Determine which certification would fit you best and apply if you can.

## Recycled materials

The [Global Recycle Standard \(GRS\)](#) is a standard for products containing recycled material, with criteria for environmentally friendly production and good working conditions. Products containing  $\geq 20\%$  recycled material can be GRS-certified, but only if the entire production process is certified. If the end product is not produced in a

certified factory, it may not carry a GRS quality mark. If you use GRS-certified material, you can highlight in your communication that this material is certified.

#### Tips:

Check for GRS-certified versions of the materials you use, as an alternative or addition.

Carefully check the specifications of the available GRS-certified materials. Sometimes composition changes due to the recycling process.

When using GRS-certified materials, indicate this correctly in your communication.

Read more about [GRS](#) in the ITC Standards Map.

## 2. Through which channels can you get table and kitchen linen on the European market?

The European table and kitchen linen market consists of low-, mid- and high-end (premium) segments. The items are put on the market through importers/wholesalers that supply to retailers, as well as retailers that buy directly from suppliers.

### How is the end-market segmented?

Figure 1: Table and kitchen linen market segmentation in Europe



Source: Globally Cool, GO! Good Opportunity & Remco Kemper

### Low-end market

In the low-end segment, simple and inexpensive linens are common. Retailers include low-end department stores like [Zeeman](#). Products from China, Pakistan and India generally dominate this market. Competing with this type of cheap mass production is almost impossible. Instead, the middle- and higher-middle market segments offer you the best opportunities.

## Mid-end market

The mid-end segment has a stronger focus on design and finish, while prices are still reasonable. [Zara Home](#) and [Habitat](#) are examples of players in this segment. For this market, you need to pay attention to design and quality.

If your production is very efficient and mechanised and you have access to cheap raw materials, you can target the lower-middle market. For the higher-middle segment, you must offer added value through your materials and/or craftsmanship. In this segment, your story becomes more important.

## High-end/premium market

In the high-end segment, designer quality is common and private labels are the standard. The emphasis is on excellent quality of the raw materials and finish. The finish is often done by hand, using traditional techniques. Luxury department stores like [Harrods](#) play an important role. European brands like [weissfee](#) and [Alexandre Turpault](#) hold part of this market, using precious raw materials and elaborate techniques.

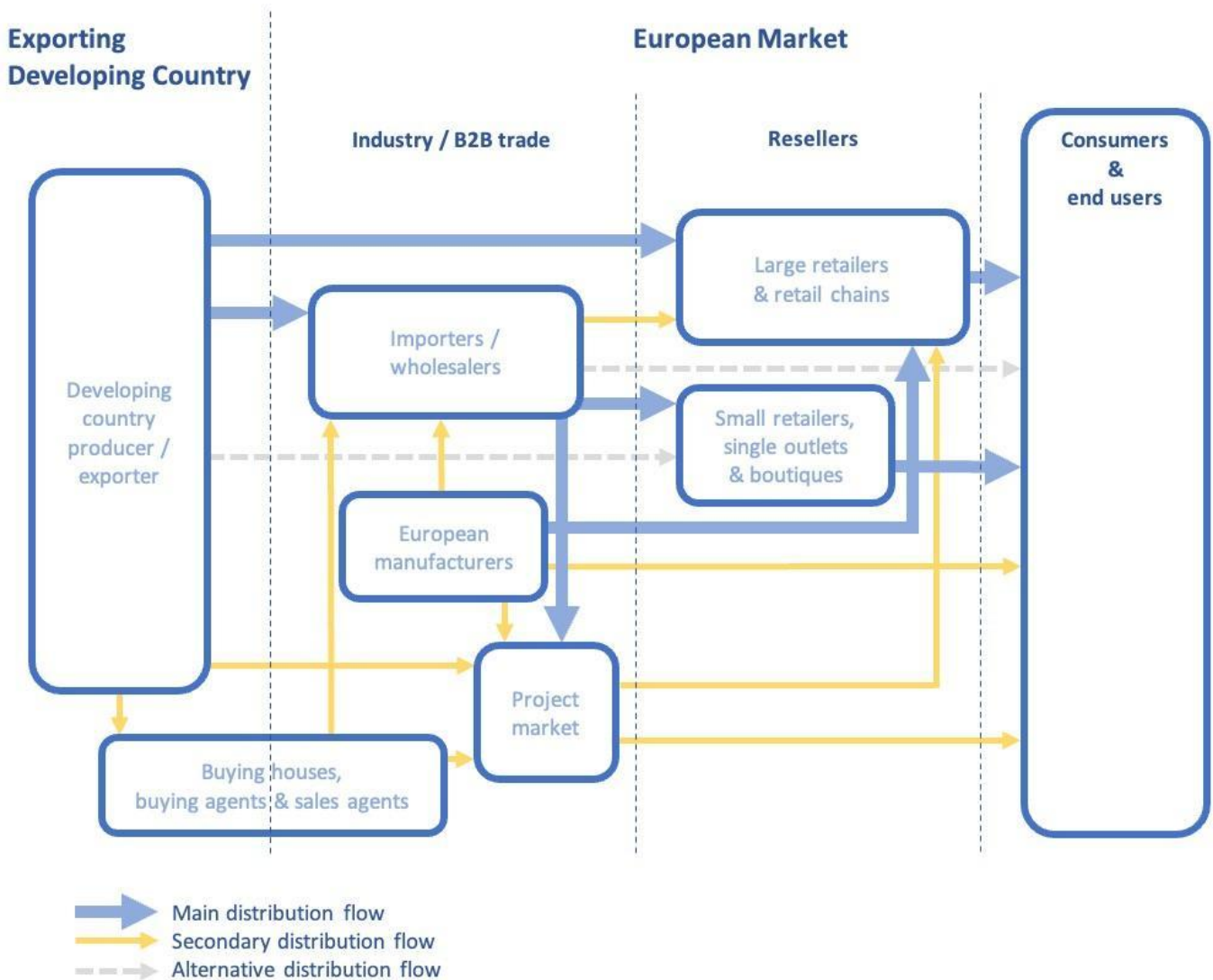
Figure 2: Hand-embroidered and upcycled tablecloth with complementary napkins

Source: [Alexandre Turpault @ YouTube](#)

## Through which channels does table and kitchen linen end up on the end-market?

Market access channels mainly follow the traditional HDHT patterns. Importers/wholesalers supply to retailers. Larger retail chains often import for themselves, while more and more smaller retailers have also started buying directly from the supplier. In some cases, buying agents play a role.

Figure 3: Trade channels for table and kitchen linen in Europe



Source: Globally Cool, GO! Good Opportunity & Remco Kemper

## Importers/wholesalers

Importers/wholesalers sell products to retailers in their own country or region, or re-export across Europe. Supplying to buyers in the project market (such as hotels and spas) is another distribution flow for them.

These importers/wholesalers handle the import procedures. They take ownership of the goods when they buy from you (unlike 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, types 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 even have their own buying offices in developing countries. Others - mainly smaller independent stores - order in Europe from wholesalers.

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

## Buying agents, buying houses and sales agents

You can encounter several types of intermediaries when doing business with European buyers:

- European buying agents represent European buyers in sourcing countries and do not import products themselves. Sometimes they have a more limited role, such as checking the quality of the products. They can work individually or as part of a purchasing company.
- Buying houses are comparable to buying agents, but they are based in your country and usually offer more services. These can range from raw material sourcing to design and sampling services.
- European sales agents can help you find European buyers. However, you should be careful before entering into agreements with commercial agents, because [European legislation protects their position](#).

Agents and buying houses mostly work on commission. They may approach you directly, or your buyer may request an intermediary. However, you should always try to work with your buyer directly. This saves on commission and allows you to communicate with your buyer.

## E-commerce

E-commerce has grown in recent years. Your easiest way to benefit is by supplying to a European wholesaler or retailer with a strong online presence. This is usually not a separate channel. Retailers often combine online and offline channels, and they are supplied in the same way. Companies that only sell online also need to take stock before they can sell.

### Direct business-to-consumer (B2C) sales

Selling directly to European consumers can be complicated and costly. You are responsible for factors such as aftersales obligations and payment systems. For most exporters from developing countries this is not feasible. In addition, according to Dutch consumer association Consumentenbond, [Dutch consumers bought less from non-EU web shops](#) after [new EU VAT rules](#) were rolled out in 2021. This could make direct online sales even less attractive.

Tips:

To find buyers, search the exhibitor lists or attend the main European trade fairs: [Ambiente](#) and [Heimtextil](#) (January/February) in Frankfurt and [Maison&Objet](#) (January and September) in Paris.

Search member lists of relevant industry associations like [EURATEX](#).

See our [tips for finding buyers](#).

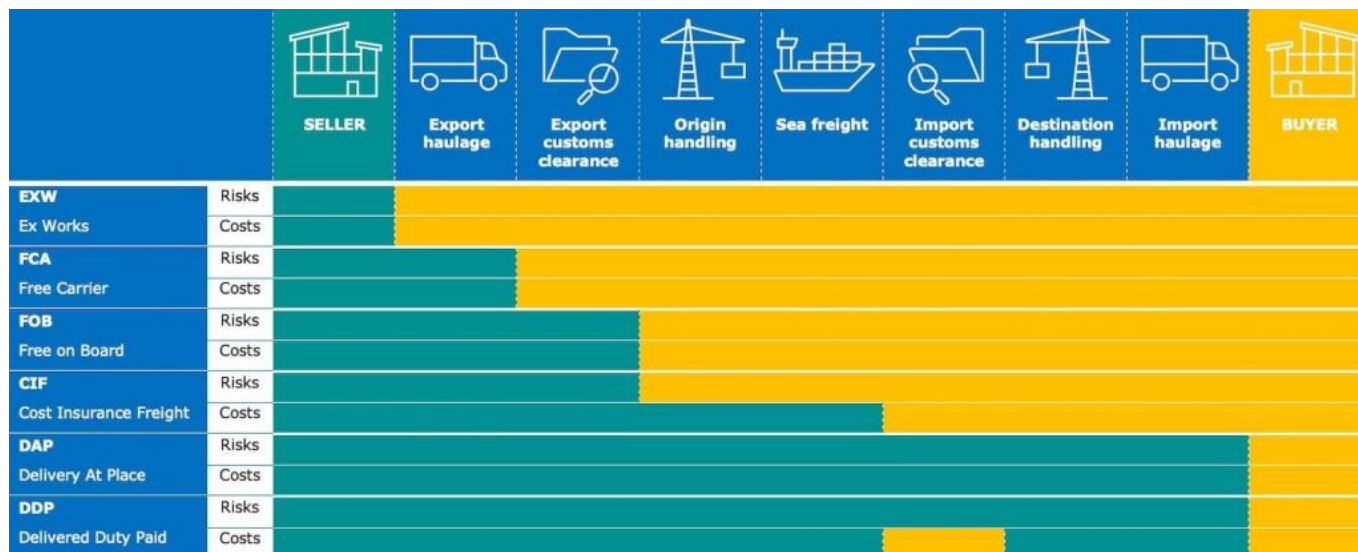
For more information about trading directly with smaller retailers and e-commerce, see our [study on alternative distribution channels](#).

## What is the most interesting channel for you?

Importers/wholesalers are the main channel between exporters in developing countries and European retailers.

They are interesting if you want to develop a long-term relationship. These importers usually know the European market well, so they can provide you with valuable information and guidance on market preferences. They generally prefer FOB or FCA Incoterms.

Figure 4: Incoterms



Source: Globally Cool, GO! Good Opportunity & Remco Kemper

Large retailers are increasingly importing for themselves to cut the margins of importers/wholesalers, reduce time to the market, and have more control over product design and finish. In the lower-end market segments, self-importing retailers might want to drive a much harder bargain with you to keep prices as low as possible. However, price is a bit less sensitive in the middle- and higher-middle segments, which offer you the most opportunities.

Smaller, independent retailers continue to buy mainly from domestic importers/wholesalers. But as in other sectors, independent HDHT retailers struggle to compete with retail chains. They need to differentiate on value-added service, specialised offers and authenticity. An interesting way for them to do so is by buying directly from producers in developing countries. They typically prefer small order quantities per item, small total order volumes, and delivery to their doorstep via Delivered Duty Paid (DDP) or Delivery At Place (DAP). Repeat orders are less likely.

Smaller, independent European retailers continue to purchase mainly from domestic wholesalers/importers. As in other sectors, they struggle to compete with retail chains. They need to differentiate on value-added service, specialised offers and authenticity. Buying directly from producers in developing countries is an interesting way for them to do so. They typically prefer small order quantities per item, small total order volumes, and delivery to their doorstep via Delivered Duty Paid (DDP) or Delivery At Place (DAP). Repeat orders are less likely.

The trend of direct sourcing is expected to continue. This may create more opportunities for you, as a growing pool of buyers could improve your bargaining position. Because importing retailers order for their own shops, they can place orders much quicker than importers/wholesalers who may need to show samples to their retailers before ordering. You need to calculate whether trading directly with smaller retailers is cost-effective for you.

**Tips:**

Consider targeting retailers directly to improve your bargaining position and potentially close 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, the better you will be able to set prices.

Build a relationship based on mutual benefits by offering services like fast delivery and after-sales support.

If you are interested in selling to small independent retailers, make sure to have a policy for them when you participate in international trade fairs. You must have appropriate terms of trading, like low minimum order quantities.

### **3. What competition do you face on the European table and kitchen linen market?**

European table and kitchen linen imports are not clearly dominated by a single source country. Pakistan, China, Türkiye and India are Europe's leading suppliers. Much of their exports are mass-produced items for the lower-end segments. Instead of competing with this, your best opportunities are in the middle- and higher-middle market.

#### **Which countries are you competing with?**

Source: UN Comtrade

#### **Pakistan is Europe's leading supplier**

In 2020, Pakistan became Europe's leading table and kitchen linen supplier. The country has access to a large and cheap workforce. It is one of the leading cotton producers and has a large spinning capacity. This gives Pakistan a clear competitive edge in the production of cotton linens.

Pakistan's table and kitchen linen exports to Europe grew from €361 million in 2018 to €555 million in 2022, at an average annual rate (CAGR) of 11%. Almost all of it was kitchen and toilet linen made of cotton terry, and some made of 'regular' cotton.

#### **China supplies the lower-end market**

Europe's second-largest table and kitchen linen supplier is China. Chinese producers mainly supply the low-end market with low-priced products. This is reflected in the fact that more than half of their supplies were man-made fibres. China's table and kitchen linen exports to Europe grew from €423 million in 2018 to €437 million in 2022, peaking in 2019. This translates to a 0.8% CAGR, meaning China has let some market share slip.

The country is a competitive supplier because of its low-cost workforce, availability of raw materials and efficient shipping to Europe compared to other Asian countries. However, rising labour costs have affected its price competitiveness. In the coming years, China's trade war with the United States and other disruptions may affect its exports. This could benefit companies from other developing countries, like yours.

To avoid competing on costs, you should stay away from mass-produced items. Focus more on sustainability, materials and your story. This allows you to enter the middle and higher-middle market.

## **Türkiye's exports to Europe are recovering**

Türkiye has long been Europe's leading table and kitchen linen supplier. The country offers a low-cost workforce and a convenient location close to the market, allowing for relatively easy and affordable transport.

However, Türkiye's table and kitchen linen exports to Europe declined between 2016 and 2020. The country held on to its leading position until 2017-2018, but was then overtaken by Pakistan and China. Its supplies returned to €406 million in 2022. Most of this was cotton terry kitchen and toilet linen. The recent devaluation of the Turkish lira may have facilitated this recovery, making Turkish products more affordable for European buyers.

## **India holds on to its market share**

India offers skilled labour and transport at relatively low costs. As one of the biggest cotton producers, manufacturers have direct access to high-quality cotton at relatively low prices. This lets them target higher segments than the mass-produced products from countries like China.

The country's table and kitchen linen exports to Europe grew from €339 million in 2018 to €381 million in 2022 (CAGR 2.9%). This represents a strong comeback, after a drop of -24% in 2020. These exports mainly consisted of terry cotton table and kitchen linen.

## **Which companies are you competing with?**

The following companies are examples of your competition.

### **MagicLinen, Lithuania**

Lithuania is a popular sourcing destination for linen home textiles. [MagicLinen](#) is a representative example, using simple sophisticated designs that capitalise on the properties of linen fabric.

Figure 6: OEKO-TEX-certified handmade linen home textiles



The company's products are OEKO-TEX-certified. Their packaging materials are sourced from environmentally friendly packaging suppliers and consist of corn starch and bio-based polymers. MagicLinen strives to minimise waste by using textile leftovers to create smaller items like tote bags and Christmas decorations. They also cater to the project market with products for businesses like hotels, spas and restaurants.

Skinny laMinx, South Africa

South African producer [Skinny laMinx](#) sells both business-to-business (B2B) and business-to-consumer (B2C). Its designs are screen-printed onto fabric and have a mid-century look.

Figure 7: Skinny laMinx's story

Source: [Skinny laMinx @ YouTube](#)

In 2021 Skinny laMinx chose to continue their business online, working out of Cape Town. The company emphasises the importance of its local supply chain. They use water-based inks and fabrics of natural fibres and reuse offcuts and scraps to prevent waste. Their Kitchen & Dining range is part of a larger collection of home textiles, and they also sell their fabrics by the metre.

## **Cotton Concepts, India**

India's Cotton Concepts designs fine home textiles and furnishings for renowned global brands and retailers. They strive to 'make sure that the made-ups that come out of our factories cause no impact to the environment and foster the concepts of sustainable living'. The company relies on certification to verify its sustainable claims -including OEKO-TEX, Sedex, SA 8000, GRS and GOTS. They are also ISO9000:2015-certified, demonstrating their commitment to quality.

Figure 8: Recycling and reprocessing used cotton clothes into yarn

Source: [Cotton Concepts @ YouTube](#)

Cotton Concepts only works with organic fibres like cotton, jute and other natural materials. They also make new products from old cotton textiles that are collected, processed and recycled into yarn. Their collection of table and kitchen linen ranges from napkins and tablecloths to towels and potholders in various designs.

### **Which products are you competing with?**

Consumers are increasingly committed to a responsible lifestyle. Sustainably produced table and kitchen linen is therefore an ongoing trend, competing with mainstream products. It can be produced by, for example, using 100% organic cotton and natural dyes. You also face competition from disposable paper products.

#### Tips:

Compare your products and company to the competition. You can use [ITC Trademap](#) to find exporters per country.

Focus on design, craftsmanship, quality and the story behind your products.

## **4. What are the prices of table and kitchen linen on the European market?**

Prices for table and kitchen linen vary across market segments. After adding logistics costs, wholesaler and retail margins, and value added tax (VAT), European consumer prices are about 4-6.5 times your selling price.

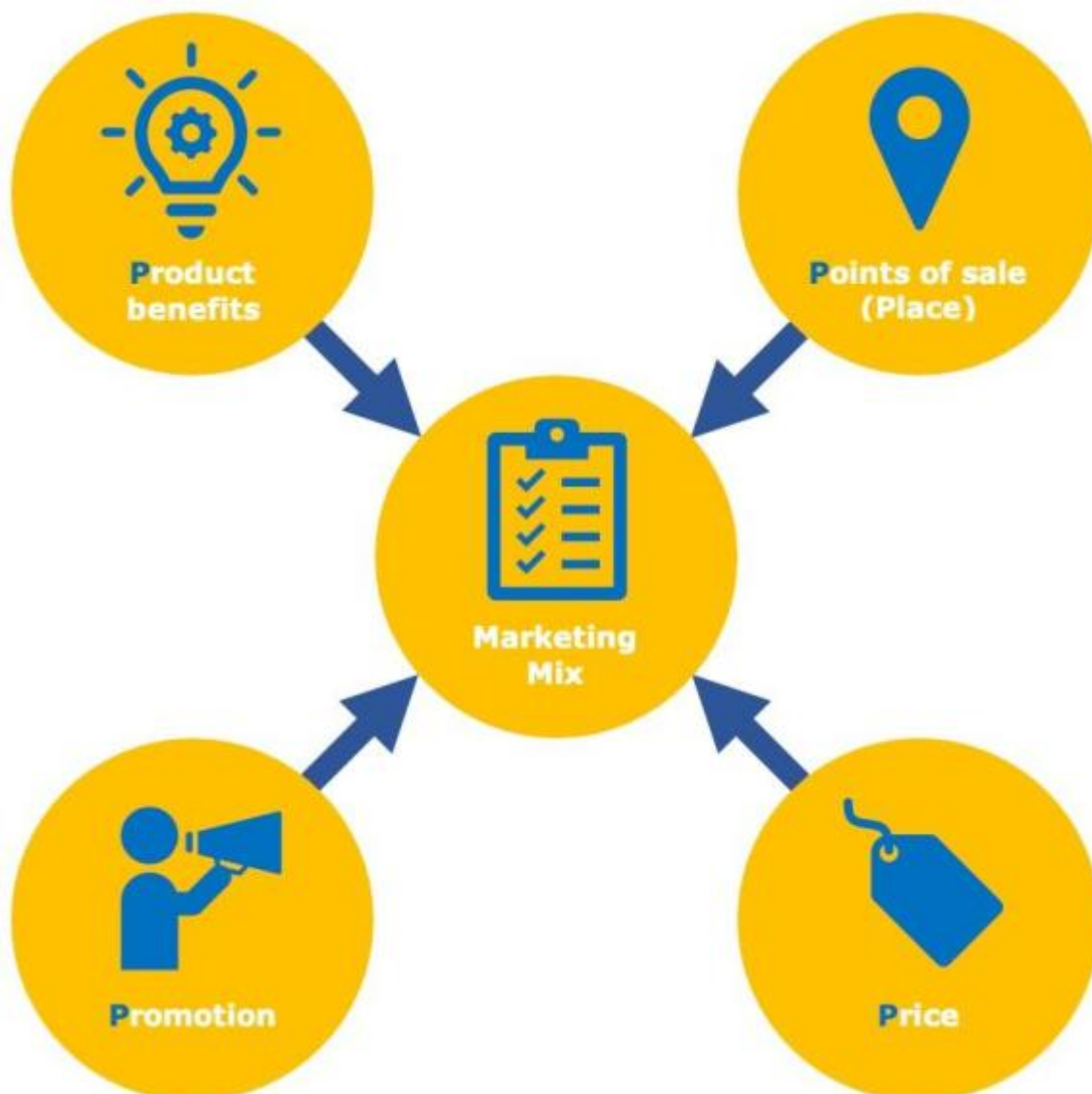
Table 1 gives an overview of prices across market segments. Be aware that these are just an indication, since prices vary depending on technique, size, material, design, brand and other ways of value addition, including a strong sustainable concept.

Table 1: Indicative consumer prices of table and kitchen linen in Europe

	Low-end	Mid-end	High-end/premium
Tablecloth	€5-20	€20-100	€100 or more
Placemat (per piece)	€1-5	€5-20	€20 or more
Kitchen towel (per piece)	€0.75-7	€7-25	€25 or more

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

Figure 9: Marketing mix - the 4 Ps



Source: Globally Cool, GO! Good Opportunity & Remco Kemper

The European consumer price of your table and kitchen linen is around 4-6.5 times your FOB price. In addition to energy, labour and transport costs, FOB prices depend heavily on the availability and cost of raw materials. Occasional cost increases are not directly passed on to the consumer, so they put pressure on margins in the supply chain. However, recent disruptions have resulted in longer-term cost increases. This continuing pressure made many retailers raise their consumer prices. If costs drop again, consumer prices may follow.

Consumer prices generally consist of:

- Your FOB price;
- Shipping, import, handling costs;
- Wholesaler margins;
- Retail margins; and
- VAT - varies per country, about 20% on average.

Figure 10: Price breakdown indication for candles in the supply chain



Source: Globally Cool, GO! Good Opportunity & Remco Kemper

To illustrate: in Table 2 the FOB price is set at €10. Depending on the segment your product is designed for, the consumer price ranges from €41 (low-end) to €65.50 (high-end). In the high-end segment, prices could multiply even further.

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 including 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
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The FOB price of €10 includes your own margins. These depend on your efficiency and price setting. Margins in the lower segment are generally smaller than in the middle and higher segments.

Examples of consumer prices:

- Set of 2x2 cotton kitchen and tea towels, [Hema](#), €6.25;
- GOTS-certified organic cotton knitted kitchen towel, [Aspegren](#), €11,90;
- 180x180cm hemp tablecloth, [Draper's Organic](#), £40.00.

#### Tips:

Study consumer prices in your target segment to determine your price and adjust your cost accordingly. Your quality and price must match your target segment.

Calculate your prices regularly and carefully, especially if the prices of your raw materials fluctuate. When raw material prices put pressure on your margin for a longer period, consider increasing your price or finding an alternative.

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

[Globally Cool B.V.](#) carried out this study in partnership with Remco Kemper on behalf of CBI.

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