

# Entering the European market for ready-made curtains

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The European ready-made curtain market offers opportunities, but competition is fierce. As mass-producing countries dominate the lower ends of the market, it is best to focus on the mid-end of the European market. Added value needs to be offered through design, craftsmanship, sustainability, and storytelling. In order to be allowed to enter the European market, the European Union's (legal) requirements must be complied with, as well as any additional or niche requirements buyers may have.

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## 1. What requirements must ready-made curtains comply with to be allowed on the European market?

Ready-made curtains must satisfy certain requirements in order to be allowed on the European market. For a more detailed overview, see our report on [buyer requirements for Home Decorations and Home Textiles \(HDHT\)](#).

### What are the requirements?

#### General Product Safety Directive

Europe's [General Product Safety Directive](#) (2001/95/EC) is a legislative framework, stating that all products marketed in the European Union (EU) must be safe to use. Unsafe products are rejected at the European border or withdrawn from the market.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.

For internal blinds specifically, the [European Committee for Standardisation](#) (CEN) has developed three product standards:

- EN 13120 + A1: performance requirements including safety
- EN 16433: protection from strangulation hazards - test methods
- EN 16434: protection from strangulation hazards - requirements and test methods for safety devices

In 2021 the European Commission adopted a [proposal for a General Product Safety Regulation](#), to replace the current directive. This new legislation would be applied in its entirety across the EU.

### Tips:

Familiarise yourself with the EN standards for internal blinds and comply with those that are relevant

for your products.

Read more about the [General Product Safety Directive](#) and stay up to date on the proposed rollout of a new [General Product Safety Regulation](#).

Use your common sense to ensure that normal use of your product is not dangerous.

Search the [Safety Gate alerts](#) for ready-made curtains to get an idea of what kinds of issues may arise.

## 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](#)
- certain flame retardants, such as TRIS, TEPA and PBBs

### Tips:

Make sure you comply with the restrictions for the use of chemicals as laid down in [REACH](#).

Do not use azo dyes that release forbidden aromatic amines. This includes checking your own suppliers and asking for certified azo-free dyes. Be aware of the fact that the legislation lists the aromatic amines, not the azo dyes that release them.

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

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

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

## Textile Regulation

The European [Textile Regulation](#) states that textile products must be labelled or marked, to ensure that consumers know what they are buying. The regulation applies to all products that contain at least 80% (by weight) of textile fibres. These products must have a label that states their full fibre composition and, if applicable, the presence of non-textile parts of animal origin. The label needs to be durable, easily legible, visible, accessible, and printed in all the official national languages of the European countries the product is sold in.

There is no EU-wide legislation on the use of symbols for washing instructions and other care aspects of textile articles. To give consumers clear information, you should follow the [ISO 3758:2012](#) standard for the use of graphic symbols in care labelling.

## Tips:

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

Make sure you know your product and how it should be labelled in Europe. For example, if you use the name of type of cotton, trademark, or other term that implies the presence of a type of cotton, the generic fibre name 'cotton' must be used. Find out more about [textile labelling rules](#) from Access2Markets.

## Packaging legislation

The [Packaging Directive](#) (94/62/EC) is aimed at preventing or reducing the impact of packaging and packaging waste on the environment. Buyers may therefore ask exporters to minimise the use of packaging and/or to use sustainable (recycled) materials. The EU's new [Circular Economy Action Plan](#) identifies packaging one of the sectors that uses the most resources, with high potential for circularity. All packaging on the European market should be reusable or recyclable in an economically viable way by 2030. To help achieve this, the Packaging Directive is under review.

Europe also has [requirements for wood packaging materials](#) (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, see the EU's [packaging and packaging waste legislation](#) and [wood packaging material factsheet](#).

Stay up to date on the [review of the Packaging Directive](#).

## What additional requirements do buyers often have?

### Sustainability

Requirements with regard to social and environmental sustainability are becoming increasingly common on the European market. These include requirements with regard to sustainable raw materials and production processes, as well as the impact a company has on the environment, the well-being of its workers and the community. These topics can be included in the "story" behind a product and company. Buyers appreciate good storytelling as it helps create an emotional connection with their customers.

### Consumers value sustainability

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

An increasing number of European buyers prefer to work with exporters which comply with the following schemes:

- [Business Social Compliance Initiative \(BSCI\)](#): an initiative of European retailers to improve social conditions in sourcing countries. They expect their suppliers to comply with the [BSCI Code of Conduct](#).
- [Ethical Trading Initiative \(ETI\)](#): an alliance of companies, trade unions and volunteer organisations. ETI aims to improve 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 Advance](#) platform allows you to share your sustainability performance, based on a self-assessment.

Standards such as [ISO 14001](#) and [SA 8000](#) can be consulted to find out more about on sustainable options. However, only niche market buyers demand compliance with such standards.

## Greenwashing - be honest about sustainability

[Half of green claims are not supported by evidence](#), according to a recent screening of websites by the European Commission and national consumer authorities. With this so-called 'greenwashing', companies pretend to be doing more for the environment than they really are. In 42% of the cases the claims were believed to be exaggerated, false or deceptive and could potentially qualify as unfair commercial practices under EU rules. Unsurprisingly, many consumers (and importers) do not trust generic sustainability claims. In a 2021 study, [just 20% of Western European respondents had a great deal a lot of trust in claims about sustainable business practices](#).

Clearly, being honest yet effective is key. For help with communicating about sustainability performance, see the [guidelines sustainability claims](#) published by the Netherlands Authority for Consumers and Markets. The British Competition and Markets Authority's [guidance for businesses on making environmental claims](#) also lists 6 principles to follow.

Organic cotton is becoming an increasingly popular sustainable option for home textiles. Although this is not (yet) a mainstream requirement, you can research your options for certification from the [Global Organic Textile Standard \(GOTS\)](#). The easiest way to use certified organic cotton is by sourcing certified organic yarn or fabric. See an example of [handmade organic cotton khadi curtains](#).

The European Commission has 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](#). One goal of this strategy is to boost the European market for sustainable and [circular textiles](#).

## Tips:

Optimise your sustainability performance. Reading up on the issues addressed by the initiatives such as [BSCI](#) and [ETI](#) will give you an idea of what to focus on.

If you can show your sustainability performance, for instance with a self-assessment like the [BSCI Producer Self-Assessment](#) and [Sedex' Self-Assessment Questionnaire](#), or a code of conduct such as the [ETI Base Code of labour practice](#), this may give you a competitive advantage

Stay up to date on the launch of the [strategy for textiles](#). For more information on European developments in the field of human rights and sustainability, also see the [proposal for a Directive on corporate sustainability due diligence](#). This Directive requires larger companies to identify and – where necessary – prevent, end or mitigate the negative impacts of their activities on human rights and the environment.

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

See the ITC Standards Map for more information on [BSCI](#), [ETI](#), [Sedex](#), [SA8000](#) and [GOTS](#).

## Labelling

The information on the outer packaging of ready-made curtains should correspond to the packing list sent to the importer.

External packaging labels should include:

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

The most important information on the product labels of ready-made curtains is the composition, size, origin and care labelling. The buyer will also 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 often included on the product label. For more information, please refer to the chapter on the Textile Regulation.

## Packaging specifications

### Importer specifications

You should pack ready-made curtains according to the importer's instructions. They have their own specific requirements for the use of packaging materials, filling boxes, palletisation and stowing containers. Always ask for the importer's packaging specifications, which are included in 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 as a result of dirt, temperature or humidity. Packaging should ensure the items inside a cardboard box stay clean. This is particularly important for textiles. The packaging 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 quantities, 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, as specified by the buyer.

### Cost reduction

Boxes are usually palletised for air or sea transport, and it is important to maximise the use of pallet space.

While packaging has to provide maximum protection, it is essential to avoid using excess materials or shipping

'air'. Buyers incur costs for waste removal.

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

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

## Materials

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

## Consumer packaging

Ready-made curtains are usually displayed hanging. They are often sold in packaged sets of 2 or 4. Consumer packaging must be functional: it needs to protect against water and staining. The design can be simple. Sometimes, a simple paper-based sleeve is used with the retailer's branding on it – but only if the retailer specifically requests this.

### Tips:

Always ask for 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 and delivery 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, 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.

### Tips:

See our [tips on how to organise your exports](#) for more information on payment and delivery terms.

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

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

## What are the requirements for niche markets?

### Fair trade

According to the World Economic Forum, [86% of people want significant change in order to make the world a fairer and more sustainable place after COVID-19](#). The concept of fair trade supports fair pricing and improved social conditions for producers and their communities. A competitive advantage can be gained with fair trade certification, especially if the production of the items is labour intensive.

Well-known fair trade certifications are issued by the [World Fair Trade Organisation \(WFTO\)](#) and [Fair for Life](#). For most fair trade-oriented buyers in Europe however, simply complying with WFTO's [fair trade principles](#) is enough.

Figure 1: [URBANARA - ethically produced curtains of natural materials](#)

Source: [URBANARA @ YouTube](#)

#### Tips:

Ask buyers what they are looking for. In the case of fair trade products, the story behind the product is especially useful for marketing purposes.

Determine which certification programme would be the best fit for your products and apply for it if you can.

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

Check the ITC Standards Map database for more information on [Fair for Life](#).

## Sustainable textile certification

While sustainability is becoming more and more common in this sector, the actual use of certification is lagging behind. However, buyers are increasingly interested in certification to “prove” their sustainability – particularly organic certification.

Some of the most popular certification processes for home textiles are:

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

Other options include the [Nordic Swan eco-label](#) (used in the Nordic countries) and the [EU Ecolabel](#). The Ecolabel is only awarded for products with the lowest environmental impact in a product range.

### Tips:

Check the possibility of sourcing organic cotton. The easiest way to do this is to use certified organic cotton yarn if you are weaving fabric, or certified organic cotton fabric if your processes involve CMT (Cutting Making Trimming). Textile products containing a minimum of 70% organic fibres can be GOTS-certified.

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

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

## Woolmark

Woolmark certification provides consumers with guaranteed wool fibre content and an assurance of quality. It includes specific standards for several product groups, including ready-made curtains.

### Tip:

If you supply woollen products, find out [how to become Woolmark-Certified](#).

## 2. Through what channels can you get ready-made curtains on the European market?

The European market for ready-made curtains is segmented into low-, mid- and high-end (premium) market segments. Ready-made curtains are marketed mainly in the lower and middle segments. They are bought and sold 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 2: Segmentation of the European market for ready-made curtains





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

## Low-end market

In the low-end segment, ready-made curtains are generally simple and inexpensive. Typical retailers include [IKEA](#) and [La Redoute](#). Curtains in this segment are usually made of man-made fibres such as polyester, acrylic, polyamide (nylon), or blends of these fibres such as microfiber. These may be blended with cotton, but curtains made of 100% natural fibres are rare in the low-end segment due to price constraints.

Competing with the type of inexpensive, mass-produced curtains that dominate the low-end segment is almost impossible. Instead, the mid-end markets offer small or medium-sized enterprises (SME) from developing countries the most opportunities. If your production is mechanised (power looms, knitting machines, et cetera) you can also target the middle-low end.

## Mid-end market

In the middle-end segment, there is more emphasis on design and finish, while prices are still reasonable. [Urban Outfitters](#) and [Habitat](#) are examples of players in the mid-end market. This segment offers the most opportunities for exporters in developing countries, especially if special natural fibres such as organic cotton, bamboo or linen are used. Sustainability is increasingly important to consumers in this segment. Trends play a role in this segment, which may affect colours, patterns, texture and the length of curtains. This is influenced by home magazines, and DIY and make-over TV programmes.

## High-end/premium market

In the high-end segment, most of the curtains are tailormade. This segment is relatively small. To appeal to these consumers, you need to innovate by combining materials and/or adding value with techniques such as velvet or chenille weaving, embroidery and printing or embellishments. Designer quality is common and private labels are standard.

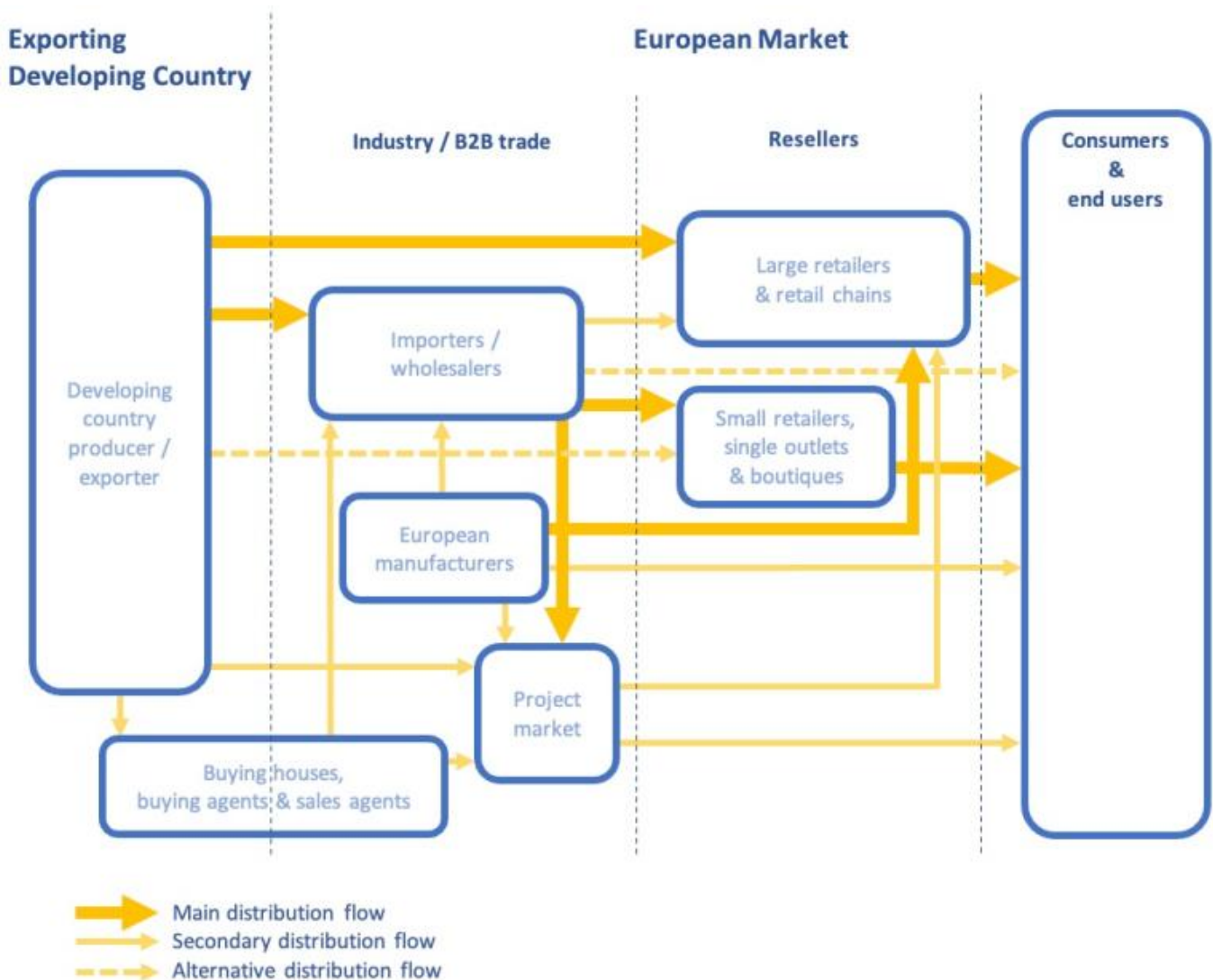
The designs in this market tend to be timeless and the focus is on the quality of the material and finish. These ready-made curtains can also be made with high-end materials such as silk, cashmere, other high-quality types of wool, and blends of these fibres. Luxury specialty stores such as [Perigold](#) and interior decorators play an important role in providing curtains and drapes to consumers in the higher ends of the market.

## Through what channels do ready-made curtains end up on the end-market?

The channels through which ready-made curtains are bought and sold on the market follow the traditional patterns: importation takes place via importers/wholesalers that supply to retailers. Larger retail chains often bypass the importers/wholesalers and import curtains themselves, while more and more smaller retailers have

also started buying directly from suppliers. In some cases, buying agents play a role.

Figure 3: Trade channels for ready-made curtains 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. Some European markets therefore source the products from importers/wholesalers from other European countries (intra-European trade). Supplying to buyers in the project market (such as hotels and spas) can be considered secondary distribution flow for them.

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

### Importing retailers

Retailers come in many sizes: they may be large and part of a chain, or small and independent. Larger retail chains, in particular, often import directly from exporters in developing countries. Many even have their own buying offices in developing countries. Others, mainly the smaller independent stores, order goods 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 decorations and textiles, as well as fashion accessories and furniture.

## Buying agents, buying houses and sales agents

European buyers work through various types of intermediaries . In developing countries, there may be buying houses, and in Europe there are both buying agents and sales agents.

- European buying agents represent European buyers in sourcing countries. They act as intermediaries, meaning they 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 the exporting country and usually offer more services. These can range from the sourcing of raw materials to design and sampling services.
- European sales agents can help you find European buyers. However, you should be careful about entering into agreements with commercial agents, because [European legislation protects their position](#).

Agents and buying houses mostly work on commission. They may contact exporters directly, or a buyer may indicate they prefer using an intermediary. However, it is always best to try and work directly the your buyer. That way, no commission is charged and the buyer can be communicated with directly.

## E-commerce

E-commerce is growing, particularly since the start of the COVID-19 pandemic. The best way to benefit from this, is to focus on finding a European importing wholesaler or retailer with a strong online presence to supply products to. For most producers, this is not a separate channel. Catering to buyers that sell online does not differ from doing business offline. Retailers often combine online and offline channels, but the way of supplying to them is the same. Companies that only sell online also need to take inventory before they can sell their products.

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

Selling directly to European consumers via an exporter's own website can be complicated and costly. The exporter bears responsibility for factors like aftersales obligations and payment systems. For most exporters from developing countries this is not manageable. In addition, according to the Consumers' Association, [Dutch consumers have been buying less from non-EU web shops](#) since [new EU VAT rules](#) were rolled out in July 2021. This makes direct online sales even less appealing.

### Tips:

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

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](#) in the European HDHT market.

## What is the most interesting channel for you?

Importers/wholesalers are the main channel between exporters in developing countries and European retailers. Working with them can be a good option if the goal is to develop a long-term relationship. These importers usually know the European market well, so they can provide valuable information and guidance on market preferences.

However, as the market becomes more and more competitive, large retailers are increasingly importing goods directly instead of through wholesale importers. Cutting out the margins of the wholesaler and reducing the delivery time to the market are obvious advantages of this. In the lower-end market segments, self-importing retailers might drive a much harder bargain. However, price is less of an issue in the mid-end segment, which offers the most opportunities.

Smaller, independent European retailers continue to buy mainly from domestic wholesalers/importers. As in other sectors, independent HDHT retailers struggle to compete with retail chains. They need to differentiate themselves based on value-added service, specialised offers and authenticity. These buyers typically prefer to order small quantities of each item and small total volumes and to have the items delivered to their doorstep. Repeat orders are also less likely with these buyers. This may not be cost-effective for all exporters.

The trend of direct sourcing is expected to continue and may create more opportunities for exporters in developing countries. The pool of buyers will grow if more retailers become importers, which could improve exporters' bargaining position. Importing retailers order for their own shops and can therefore place orders much more quickly than some importers/wholesalers, who may need to show samples to their retailers before ordering.

Curtains in the higher-end market and the project market are commonly supplied through interior decorators. They are often interested in purchasing fabrics by the metre and form a specific distribution channel. The French [Maison et Objet](#) trade fair dedicates a specific hall to such 'specifiers', and valuable contacts can be made during a visit to this fair.

### Tips:

Consider targeting retailers directly to improve your bargaining position and potentially close deals faster.

Communicate your offer and terms to the targeted retailer (large or small). Ask your existing buyers how they operate if you are unsure. The better informed you are, the better able you will be to set prices. For more information on the pros and cons of dealing directly with smaller retailers, read our report on [alternative distribution channels](#).

Build a mutually-beneficial relationship by offering services such as fast delivery and after sales support. When you participate in international (European) trade fairs, make sure you have a policy for small, independent retailers which may visit your booth. If you choose to sell to them, you must have the appropriate terms of trading, such as low minimum order quantities or pre-stocking.

## 3. What competition do you face on the European ready-made

## curtains market?

Europe imports more than a third of its ready-made curtains directly from China. To avoid competing with these manufacturers, it is best to focus on in the mid-end market.

China is the leading ready-made curtain supplier to Europe, with a direct import market share of 39%. Germany trails behind with a share of 10%. The remaining top 6 suppliers are Poland (8.4%), Turkey (5.3%), Czechia (5.3%) and the Netherlands (3.1%).

### Re-exporters or producers

It is important to be aware of the fact that European countries play different roles in the market. Some are mainly importers and others 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 also distribute them across the continent.

European production mainly takes place in Eastern Europe, mostly because of the relatively low transport and labour costs. These countries can therefore be a good alternative for sourcing low- to mid-end products. Some high-end products from well-known premium brands with a long history are also produced in Western and Southern Europe.

Mass-produced curtains are produced at the lower ends of the market and in the most cost-effective country. It is best not to try to compete with these countries, but rather to focus on the mid-end market.

## Which countries will you compete with?



### China dominates the lower-end market

After fluctuating between 2017 and 2019, imports of ready-made curtains from China to Europe fell by 11% in 2020. In 2021 the import value recovered strongly, reaching a level of €754 million, resulting in overall average annual growth of 5.8%. However, the relatively high levels of imports in 2021 are likely to have included a considerable number of delayed shipments that carried over from 2020.

Its low-cost labour, 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 10 years, which has affected China's price competitiveness. In the coming years, disruptions caused by 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 inexpensive products to the lower ends of the market, as product development and creativity are not their key strengths. To avoid having to compete with Chinese suppliers in terms of cost, it is important for a company to differentiate itself and avoid selling mass-produced items.

### 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 increase its ready-made curtain exports to Europe in recent years. The country's supplies grew from €122 million in 2017 to €163 million in 2021, at an average rate of 7.6% per year. Most of these goods are exported to Poland's neighbouring country Germany, and the Netherlands. These are both important trade hubs that re-export across Europe.

## **Turkey benefits from its central location**

With some fluctuations, imports of ready-made curtains from Turkey to Europe grew from €86 million in 2017 to €104 million in 2021. This amounted to an average increase of 4.6% per year.

Turkey offers a low-cost labour and a convenient location close to the European market, allowing for relatively easy and affordable transport. This makes manufacturing locations in Turkey more appealing than others, primarily due to cost and lead times.

## **Czechia exports mainly to trade hubs**

Another competitor from Eastern Europe is Czechia. Czechia's supplier profile is similar to that of Poland. The country is also conveniently located, and it can offer relatively affordable labour and 'Made in Europe' concepts.

Imports of ready-made curtains from Czechia to Europe grew from €93 million in 2017 to €103 million in 2021, at an average annual rate of 2.6%. Like Poland, Czechia mainly supplies to European trade hubs Germany and the Netherlands.

## **Pakistan is a key player in cotton**

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 for the manufacture of textile products. This makes Pakistan a high-volume, inexpensive sourcing hub, and gives the country a competitive edge in the production of cotton curtains. Pakistani producers also have the wider power looms that are required to efficiently manufacture wider items.

After some fluctuations, ready-made curtain imports from Pakistan to Europe reached €45 million. This amounted to an average annual decline of 4.9% per year between 2017 and 2021. As a result, the country's direct market share fell from 3.4% to 2.3%.

## **India has lost some of its market share**

Imports of ready-made curtains from India to Europe have been in decline in recent years. After a decline in 2020, they bounced back to €41 million in 2021. This amounts to an average annual decline of 9.5% between 2017 and 2021. For this reason, India is no longer one of Europe's top 6 leading suppliers. The country now holds the 10th position, as its market share has fallen from 3.8% to 2.1%.

India offers skilled labour and transport at a relatively low cost. 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.

## **Which companies will you compete with?**

### **Arma Global Trade - Turkey**

The [Arma Global Trade](#) trading group sells a broad range of home textiles and garments. Its [Monciel](#) brand offers curtains and other home textiles, targeting both the consumer and project markets. Being quite vertical in their production and spanning both types of markets, it can meet any legal requirements related to flame retardation and waterproofing and offer easy maintenance and durability.

The company is firmly embedded in the domestic textile industry, making it a formidable competitor in the more price-sensitive segments. To move up into higher-end markets, it would need to adopt and communicate appropriate sustainability values and acquire a deeper knowledge of European consumers' preferences.

## **Magic Linen - Lithuania**

Lithuania is known for its high-quality linen. Family-run manufacturer [Magic Linen](#) uses OEKO-TEX certified linen for their handmade home textiles, including curtains, bedding, and bath, table and kitchen linens. Its items "are inspired by the simplicity and the beauty of nature and bring harmony to your lifestyle".

Figure 5: Magic Linen - the production house

Source: [Magic Linen @ YouTube](#)

Sustainability is a key selling point for Magic Linen, which is taken into account in everything from their materials and certification to the shipment. Most of the textiles leftover from production are used to create smaller items, and for their B2C sales. Magic Linen uses 100% compostable primary product packaging and custom (reusable) linen dust bags.

## **Pimlico - Belgium**

Belgian household linen company [Pimlico](#) is a typical example of Europe-based competition. Pimlico offers tasteful and sophisticated collections of curtains and drapes made of linen, cotton, laces and voiles. Sourcing from European textile manufacturers and using techniques (lace) and fibres (linen) with a European heritage, it is able to cater to the mid-end segment and above. It states that it "[does] not follow trends, but [creates] products [it] [loves]", which is in line with the mentality of its customers in the higher-end market segments.

## **Which products will you compete with?**

Ready-made curtains are mainly in competition with products from the same category. For example, consumers can opt for more functional aluminium blinds, instead of textile-based curtains. Such blinds would mainly be used to block sunlight, whereas curtains offer benefits which are broader and more connected to emotions -

such as tactility, colour and pattern. Curtains can also filter the sunlight rather than just block it, adding to the amount of light and warmth in the home. As such, they play an important role in adding to the overall atmosphere of the home.

### Tips:

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

To differentiate your company from those of your main competitors, it is best to focus on design, craftsmanship, quality and the story behind your products.

## 4. What are the prices for ready-made curtains on the European market?

Prices for ready-made curtains 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 to 6.5 times your selling price.

Table 1 provides an indication of prices of ready-made curtains in the low-, mid- and high-end market segments. The key word here is 'indication', since prices for ready-made curtains mostly depend on size and material. Technique, design, brand and other methods for adding value - including a strong sustainable concept - also have an effect.

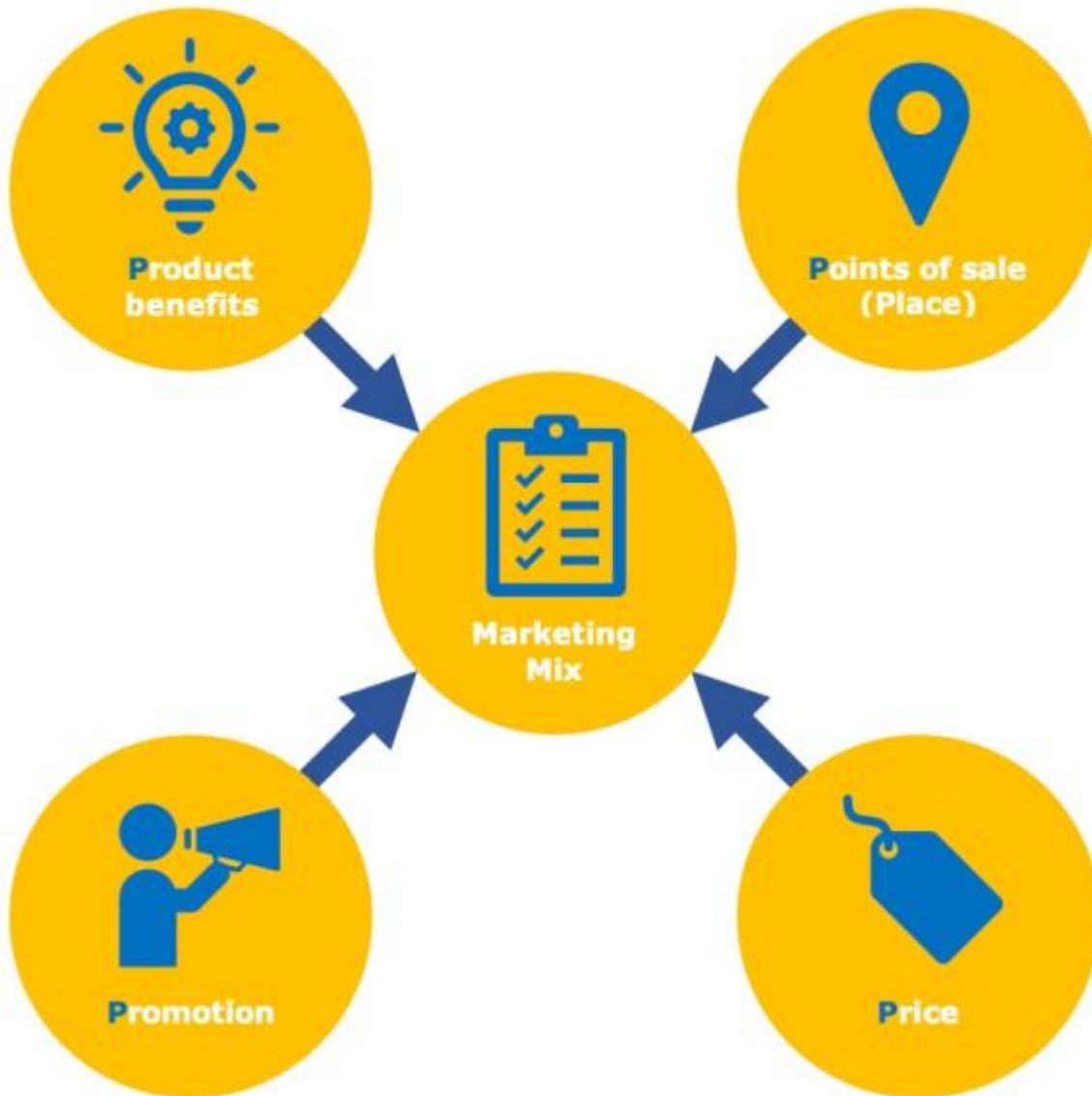
Table 1: Indication of consumer prices of ready-made curtains in Europe

	Low-end	Mid-end	High-end / premium
Ready-made curtains / set 2	Up to €50	Up to €200	€200 and over

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

Figure 6: Marketing mix - the 4 Ps





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

The European consumer price of ready-made curtains is about 4 to 6.5 times the selling (FOB) price. In addition to energy, labour and transport costs, FOB prices depend greatly on the availability and cost of raw materials. Occasional cost increases are not passed directly on to the consumer, so they squeeze the margins of exporters, importers and retailers margins. The recent pandemic-related disruptions have resulted in longer-term cost increases. Because of this continuing pressure, some European retailers have now decided to increase their consumer prices.

Consumer prices generally consist of:

- the FOB price
- shipping, import and handling costs
- wholesaler margins
- retail margins
- VAT, which varies per country, but is about 20% on average

Figure 7: Indication of price breakdown for ready-made curtains in the supply chain



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

For example, in Table 2 the FOB price is set at €10. Depending on the market segment your product is designed for, the consumer price will range from €41 in the low-end market to €65.50 in the high-end market.

Table 2: Example of the price breakdown by 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 the margins of the producer. These margins depend on efficiency and the way in which prices are determined. Margins in the lower-end segment, in which large volumes are sold at low prices, are generally smaller than those in the middle- and higher-end segments.

The following are a few examples of prices of ready-made curtains sold across Europe:

- cotton curtain panel, 140x280cm, [Leen Bakker](#) (Netherlands), €19.99
- OEKO-TEX certified cotton curtain panel, 140x250cm, [Maisons du Monde](#) (France), €34.99
- GOTS-certified organic cotton curtain panel, 140x245cm, [Bonilo](#) (Germany), €42.90
- viscose and linen blackout roman blinds, 150x140cm, [John Lewis](#) (United Kingdom), about €77

## Tips:

Research consumer prices in your target segment to determine your price and adjust your cost accordingly. The quality and price of your ready-made curtains must match what is expected in your chosen target segment.

Calculate your prices regularly and carefully, especially if the prices of your raw materials fluctuate. If raw material prices squeeze your margin for a longer period of time, you should consider increasing your price or finding an alternative.

Understand your segment and use the right 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 GO! GoodOpportunity.

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