



D1.1 – Synthesis Report of the 4 national surveys (Spain –Greece-UK-Belgium)

WP1: Conduction of a sectoral Survey

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CONTENTS

1.	INTRODUCTION AND METHODOLOGY	2
2.	The European Fashion Sector	3
2.1.	Overview	3
2.2.	Financial information of the European Fashion Sector	3
2.3.	Structure of the Fashion Retail sector.....	4
2.4.	Recent trends in the structure and strategies of European retailers	5
2.5.	Human Capital.....	7
2.6.	The consumer market.....	8
2.7.	The Children's Fashion Sector in Europe	10
3.	UK REPORT	11
3.1.	Structure of the Children's Fashion Sector in the UK.....	11
3.1.1.	Introduction	11
3.1.2.	General information that affects the children's fashion sector	12
3.2.	UK's Market Structure.....	17
4.	BELGIUM REPORT	19
4.1.	Structure of the Children's Fashion Sector in Belgium	19
4.1.1.	Introduction	19
4.1.2.	General information concerning the children's fashion sector	20
4.2.	Belgium's Market Structure	20
5.	SPAIN REPORT	22
5.1.	Structure of the Children's Fashion Sector in Spain	22
5.1.1.	Introduction	22
5.1.2.	General information concerning the children's fashion sector	22
5.2.	SPAIN's MARKET STRUCTURE	24
6.	GREECE REPORT	28
6.1.	Structure of the Children's Fashion Sector in Greece	28
6.1.1.	Introduction	28
6.1.2.	General information concerning the children's fashion sector	35
6.2.	Greece's Market Structure	36
7.	CONCLUSIONS AND NEXT STEPS.....	40
8.	BIBLIOGRAPHY	42

1. INTRODUCTION AND METHODOLOGY

The SCORE project aims to set up a quick and efficient process of Recognition and Validation of professional competencies for the Children's Products Retail personnel and entrepreneurs throughout Europe, which will be adopted by the labor market of the sector and will lead to the further certification of these competencies by the competent National Authorities in each country.

The first WP of the SCORE project aims at setting the scene for all the planned activities of the project by examining the current status of the children's fashion sector in the four participating countries: Spain, Belgium, Greece and the UK.

This deliverable presents the general situation of the fashion sector in Europe, with particular focus on the retail side, followed by details of the sector in the four countries participating in the project (UK, Spain, Belgium and Greece). It focuses on the market sector and the current trends, guiding the partners to the next stages of the project.

Each country report examines the following aspects:

- 1) The structure of the children's fashion sector (clothing-shoes), including:
 - 1) A brief presentation of the fashion sector and its recent developments
 - 2) General information concerning the children's fashion sector, such as:
 - Population data with geographical and age breakdown and family income
 - External trade figures, especially for the period 2010-2011
 - Turnover, Consumption per habitat
 - Number of retail shops
 - Retail employment
- 2) Market structure
 - 1) Description of the structure of the distribution channels and number of companies in each distribution category / shops / size
 - 2) Number of employees per category of company
 - 3) Geographical allocation of retail shops
 - 4) List of the most important companies in children's fashion (clothes, footwear, retail) and % of market
 - 5) Consumer behavior
- 3) Conclusions per country including the market tendencies

The Deliverable provides an overall synthesis of the sector and sets the framework for the implementation of WP2, where the professional profiles of the children's fashion sector are collected and analyzed.

2. The European Fashion Sector

2.1. Overview

Fashion is, and has always been, a major sector for European economy. With almost 850.000 companies, the vast majority of which are SMEs, the European fashion industries form complex, strongly interlinked value chains, embracing design, manufacturing of materials and fashion goods (such as textiles, clothing, footwear, leather and fur products, jewelry and accessories), as well as their distribution and retail to final consumers. These value chains provide employment for over 5 million people, which is equivalent to 3.7% of the total non-financial business economy (2009). Nearly 2 million are employed in fashion manufacturing alone, which represents 6% of all EU manufacturing jobs. Another 3 million European jobs can be found throughout the supply chain, from design, branding and marketing, to supply chain management and retail, which is the face of the industry for many European citizens (1, 11, 12).

The fashion industries are in constant transformation. In the past decades, the European fashion industries shifted many of their labor-intensive activities to countries with cheaper labor. This shift contributed to the reduction in the number of companies and people active in fashion manufacturing. The decreasing trend has not ceased: between 2004 and 2009, the total number of persons employed in fashion manufacturing declined significantly, from almost 2.9 million to 1.9 million. However, in fashion distribution this trend is reversed, with over 500,000 jobs created over the same period of time.

2.2. Financial information of the European Fashion Sector

In 2009, the total turnover of the EU fashion industries amounted to 525.5 billion €, implying an increase of 5.6% since 2004. The turnover share of fashion distribution amounted to 73% (383.5 billion €), an increase of 24.3% compared to the situation in 2004. On the other hand, turnover in fashion manufacturing decreased with nearly 25% in the same time span. This evolution strongly reflects the evolution in the industries' structure (2, 8, 11, 12).

Looking at the turnover share in total GDP, the EU fashion industries represented nearly 3% of total GDP in the EU27 in 2009. The share of fashion industries in GDP is highest in Italy, where turnover of fashion manufacturing and distribution represents 7.9% of the GDP, far above the EU27 average. Other countries with a share of fashion turnover above 5% of GDP are Portugal, Bulgaria and Lithuania.

Compared to fashion manufacturing profitability rates in the EU fashion distribution are significantly higher (9.3% versus 6.3% for fashion manufacturing). This is similar to the trends in productivity (and in line with the rest of the economy where services on average show a higher profitability rate than manufacturing). Whereas the top 5 countries in terms of profitability in manufacturing were largely dominated by Eastern European countries, for fashion distribution the picture is rather different with a mix of both higher wage cost countries and lower wage cost countries in the top 5. Wage costs seem to have less influence on the profitability rate in distribution than they have in manufacturing.

2.3. Structure of the Fashion Retail sector

Most European clothing retailers can be classified according to six main categories:

- *non specialised*: department stores, variety stores, hyper- and supermarkets, mail-order retailers
- *specialised (clothing)*: specialty chains, independent stores (6)

Department stores

A department store is a retail establishment which specializes in selling a wide range of products organized into departments. Main important product categories usually are: clothing, accessories, fragrances, cosmetics and home collections with no predominating merchandise line. Additionally, they may select other lines of products such as toiletries, electronics & photographic equipment, jewelry, toys, and sporting goods. Department stores mostly offer brands and they give those brands a dedicated space in terms of visual and merchandize (wall units, shop-in-shops, corners). Private labels represent a limited part of the offer. Examples include House of Fraser, La Rinascente, Coin, Printemps, Galeries Lafayette, Selfridges, El Corte Inglés, Kaufhof, Debenham and others.

Variety Stores

Frequently these stores will be located in high streets or covered shopping centres. In covered shopping centers variety stores can often be used in a secondary anchor role and are strategically placed to influence the pedestrian flow between the main anchor units. Examples include Woolworth's, Boots and W H Smith in the UK and Kiabi and Monoprix in France. It is a retail format which offers a wide range of product categories. Convenience is the common characteristic among the different product families. To give value for money they mostly offer private labels. The cosmetics department is less developed than in department stores: it is usually represented by mass market brands. Main sectors usually are: clothing, underwear and socks, home textile, childrenswear.

Hypermarkets

Hypermarkets are superstores combining a supermarket and a department store. The result is a gigantic retail facility which carries an enormous range of products under one roof, including full lines of groceries and general merchandise. Hypermarkets, like other big-box stores, typically have business models focusing on high-volume, low-margin sales. Due to their large footprints and the need for many shoppers to carry large quantities of goods, many hypermarkets choose suburban or out-of-town locations that are easily accessible by automobile. Aggressive pricing is not only financed by high sales volumes, but also by the low cost of sales space, greater autonomy in terms of logistics when compared with smaller retail outlets, a faster turnover of goods and longer opening hours. Examples include Auchan, Carrefour, Tesco.

Mail order retailers

Mail order retailers, such as La Redoute in France and Otto Versand in Germany, sell products by mail delivery. The buyer places an order for the desired products with the merchant through some remote method such as through a telephone call or an internet website. Then, the products are typically delivered directly to an address supplied by the customer, such as a home address, but occasionally the orders are delivered to a nearby retail location for the customer to pick up. Some merchants also allow the goods to be shipped directly to a third party consumer, which is an effective way to send a gift to an out-of-town recipient.

Specialty chains

Specialty chains (or multiples) have a wider geographical reach, with some very large players, such as H&M, C&A and Zara (Grupo Inditex). Some are directly owned and operated (e.g. C&A) while others have a franchise structure (e.g. Benetton). The economics of sourcing and marketing differ from those faced by independent retailers. Specialty chains are also called verticals as their main characteristic is the control of these companies over the products they sell. Specialty chains sell their own branded production, produced by favoured suppliers. For larger chains, network economies are achieved through the use of advanced information and management systems (electronic point of sale, electronic data interchange and just-in-time) and national media advertising. They can be further classified as *single-industry specialists* (e.g. Promod, Mango, Pimkie, Benetton, Terranova, Gap, Zara, Kiabi, Top Shop, C&A), *single-product specialty* (e.g. Yamamay and Tezenis for lingerie or Tie Rack for accessories), *single-client specialty* (e.g. Prenatal for mothers-to-be), and *single-occasion of use specialists* (e.g. Decathlon and Sportscheck in sportswear and activewear).

2.4. Recent trends in the structure and strategies of European retailers

In recent times, structural changes in the clothing retail industry have been occurring at three different levels:

- *Format changes*: similarly to what is occurring in food retailing, clothing retailing is displaying a tendency towards increasing store size and the diffusion of self-service. These two trends are associated to a re-configuration of formats whereby larger formats with lower price and less service are gaining market share (hypermarkets and specialty chains).
- *International competition*: the international scope of the commercial and sourcing activities of large retailers is increasing, along with the redefinition of supply policies. Specialty chains and hypermarkets are increasingly expanding the scope of their commercial activities; domestic players are facing an intensification of competition driven by the entry of large international retailers.
- *Reconfiguration of value-chains*: the international relocation of production is frequently accompanied by the increasing involvement of retailers in upstream activities such as product design; this process results in an asymmetric structure with the balance of power tipped towards those who manage the distribution process. The increased role of retailing in the textile-clothing pipeline derives not only from its bargaining power (which comes into play in transactions) but above all from its market power (its capacity to orient the final consumer's preferences) (6).

In part, these changes are driven by a continuous search for cost reductions, economies of scale and efficient exploitation of corporate assets, pushed by rising pressure of financial markets on listed companies – a phenomenon which is more pronounced in the UK (where most large retailers are listed), but which seems to be spreading also to France and Scandinavia.

Some trends are common to several European markets, and can be considered as the reflections of a more general re-configuration of the competitive landscape of the clothing retail industry:

- The increasing share of hypermarkets

- The increasing share of specialty chains
- The decreasing share of department stores

In 2009, over 3.1 million persons were employed in the EU fashion distribution. In terms of persons employed, fashion distribution represented around 7.6% of the total wholesale and retail trade in 2009. Within the fashion distribution activities, the following categories of sub-industries are identified:

- Wholesale and agents
- Retail sale of clothing
- Retail sale of other fashion goods

In 2009, 80% of the fashion distributors were active in retail sale, while the remaining 20% were active in wholesale (i.e. 'wholesale and agents'). In terms of employment, the shares are more or less comparable, with 82.2% of the persons working in retail sales and 17.8% in wholesale (and agents).

Within the group of retailers, 70.1% are retailers of clothing while 29.9% are retailers of other fashion goods. In terms of employment, the distribution is rather similar with 73.7% of the persons employed working for clothing retailers and 26.3% for retailers of other fashion goods (2).

In Europe, major differences in retail structures do exist from one country to another: the distribution structure is more concentrated in the North of Europe (United Kingdom, the Netherlands...). But the distribution structure which is still largely controlled by small independent retailers in the South of Europe and in some new Member States is rapidly changing with the arrival in those countries of mass retailers (H&M, Zara, etc).

Retail in the United Kingdom and France is dominated by specialised chainstores, who take over point of sales as independent stores disappear. In Germany the existence of buying groups has enabled independents to retain a significant market share. On those three markets the most dynamic outlets are young fashion chainstores like H&M, Esprit, Zara, and discounters like Matalan, Vêt'Affaires, to the detriment of classical apparel stores and department stores. In Spain the distribution system is rapidly changing as Zara, Mango, Cortefiel develop their retail networks. Italian independent retailers retain an exceptionally high share of the market, however decreasing to the benefit of chainstores, like H&M or other European players, but also to the benefit of industrial firms which gradually integrate distribution, like Vestebene.

The structural make-up of clothing retailers in the EU has changed considerably over the past 15 years, according to a 2007 report on 'Business relations in the EU clothing chain' carried out for and funded by the European Commission. The market share of independent retailers in the five largest EU markets (Italy, Spain, France, Germany and the United Kingdom, that together account for almost three quarters of the EU-25's clothing market) declined from 46.8 % of total clothing sales to 27.1 % by 2007. In contrast, there was steady growth in the share of speciality chains (from 18.7 % to 25.1 %), hypermarkets and supermarkets (5.1 % to 6.8 %) and emerging formats such as variety stores and large sports chains (whose share of clothing sales collectively rose from 14.0 % to 27.2 %) (2, 9, 11).

The following table presents the different size of the companies in retail in the EU27 countries, which clearly demonstrate the differences between south and north Europe (highlighted are the countries participating in the SCORE project) (8).

Industry, trade and services
Structural business statistics
Value added by enterprise size-class, distributive trades and transport, hotels and restaurants, 2007 (1)

	Distributive trades: size class share in total value added (%)			
	Micro	Small	Medium-sized	Large
EU-27	26,5	24,4	18,2	30,9
Belgium	26,9	29,0	18,6	25,5
Bulgaria	25,7	35,0	23,7	15,7
Czech Republic	29,3	28,0	21,2	21,6
Denmark	21,4	29,3	22,5	26,9
Germany	17,6	25,4	21,1	35,9
Estonia	27,7	33,4	23,2	15,6
Ireland	16,6	37,0	23,3	23,1
Greece	40,5	29,5	16,5	13,6
Spain	33,3	24,2	16,6	25,9
France	27,4	24,7	16,4	31,5
Italy	47,4	25,7	12,1	14,8
Cyprus	34,6	30,1	25,5	9,8
Latvia	22,4	35,2	25,9	16,4
Lithuania	16,2	31,0	25,9	26,9
Luxembourg	33,5	30,1	22,9	13,6
Hungary	28,6	26,4	26,1	19,0
Malta	:	:	:	:
Netherlands	24,9	27,3	23,1	24,7
Austria	22,1	26,3	21,7	29,9
Poland	31,8	19,6	22,8	25,8
Portugal	31,7	28,5	18,2	21,5
Romania	23,8	28,7	25,0	22,5
Slovenia	28,1	27,3	21,0	23,6
Slovakia	33,0	35,9	15,7	15,4
Finland	26,5	23,5	16,7	33,3
Sweden	22,7	25,8	20,1	31,4
United Kingdom	19,6	17,4	15,9	47,1
Norway	24,9	30,6	19,0	25,5

2.5. Human Capital

Over the past decades, the structure of the workforce in the European fashion industries has changed significantly. The availability of properly skilled workers has become one of the key concerns, and is likely to become even more important in the future. There are several reasons behind this situation, in particular an ageing workforce, difficulties in attracting young people to some parts of fashion manufacturing, a mismatch between education systems and the industry's needs, and low mobility of industry workers. Moreover, many companies and the associated

jobs are lost because of problems with succession, transfer and takeover of businesses (1).

In line with demographic changes in Europe, employment in the EU fashion industries is ageing. Between 2000 and 2010 the share of the 15-39 age group in fashion employment has declined, whereas the share of the 50+ age group has increased. The ageing of the workforce especially affects manufacturing activities, whereas shifts in wholesale and retail trade are less pronounced. Also, although the ageing process can be observed in both the EU15 and NM12, this process is much slower in the last group. In this context, Economix (14) remarks that due to less flexible labor markets in the EU15, especially younger people (15-39) have been hit by the job cuts in the fashion industries whereas older people – in particular the 50+ age group – more often could keep their jobs thanks to more legal protection and thus gained in relative terms. Moreover, the structural decline of the manufacturing sub-industries in Europe has provided these sub-industries with a rather negative image, making especially the manufacturing activities in the fashion industries unattractive for many young people. The ageing process that affects the European economy in general, thus affects the EU fashion industries more than average due to declining economic activities.

Necessary skills include:

- Increased demand for marketing and sales skills, brand management skills
- Increased focus on creative and innovative skills
- Increased importance of strategic market intelligence
- Growing need for more managerial skills in creative businesses

2.6. The consumer market

The European consumer market – comprising clothing, footwear, furniture and household textiles – amounts to 531 billion euros. The clothing market represents more than half of the whole, followed by furniture which accounts for 27% of the total. Footwear is the third largest market, followed by household textiles. The three largest markets are by far Germany, the United Kingdom and Italy, followed by France and Spain. New Member States represent less than 4% of the total EU 25 (3, 4).

The “Big Five” i.e. Germany, the United Kingdom, Italy, France and Spain with a combined population of more than 300 million represent two thirds of the total EU 25 population and 78% of consumption. Germany is the largest market in all consumer sub-sectors, with the exception of footwear for which Italy is the largest one and of household textiles for which the United Kingdom ranks first.

Consumers in Europe are able to purchase clothing and footwear from a wide variety and large number of retailers, specialized and nonspecialised. Specialist clothing and footwear retailers comprise chains (such as H&M, C&A or Zara) and independent clothes stores. Non-specialist retailers include department stores (that have clothing and footwear departments), hypermarkets and supermarkets, as well as mail-order retailers. According to the Institut Francais de la Mode (3), almost two thirds (62%) of clothing expenditure in the EU-25 was carried out within specialist clothing stores

(chain stores or independents) in 2004. One important point is the relative popularity of independent clothing stores in the EU-25, which accounted for the second highest proportion of clothing expenditure (28%) among the categories shown, behind specialist clothing multiples/chain stores. There are generally higher levels of retail concentration in northern Europe. The overwhelming majority of clothing and footwear sales in Germany, France and particularly the United Kingdom are made in non-specialist stores. The popularity of independent clothing and footwear retailers is considerably higher in southern Europe. For example, in Italy and Spain, the highest proportion of clothing sales was among independent retailers (65% and 53% respectively in 2004), and this tendency was even stronger in terms of footwear (76% and 88% respectively in 2003). Despite these differences, clothing markets in Europe are generally becoming more concentrated, as clothing chains, department stores and supermarkets/ hypermarkets selling clothing and footwear open additional outlets in many of the countries that have joined the EU since 2004.

This recent survey also reflects the dichotomy in the structure of clothing and footwear retailing across the EU. Retail chain stores specializing in clothing and footwear were the most common format for shopping in 13 of the Member States in 2008, while consumers in 12 of the Member States preferred small, independent shops. Denmark, Ireland, France and the Netherlands had a relatively high proportion of consumers who preferred shopping in retail chains specializing in clothes and footwear, while consumers in the vast majority of southern and eastern Member States chose small, independent stores. Among those surveyed in Denmark and the United Kingdom, a relatively large share made purchases of clothing and footwear in supermarkets and hypermarkets, whereas department stores were a popular retail format for clothes and footwear purchases in Germany, Ireland and Luxembourg (4, 5).

The Distribution channels mostly used in the four countries participating in the SCORE project, together with the mean % for EU15 and EU27 and the max and min % are presented below (9). Again this clearly demonstrates the differences in the various countries, with Greece having the highest % of small stores / boutiques.

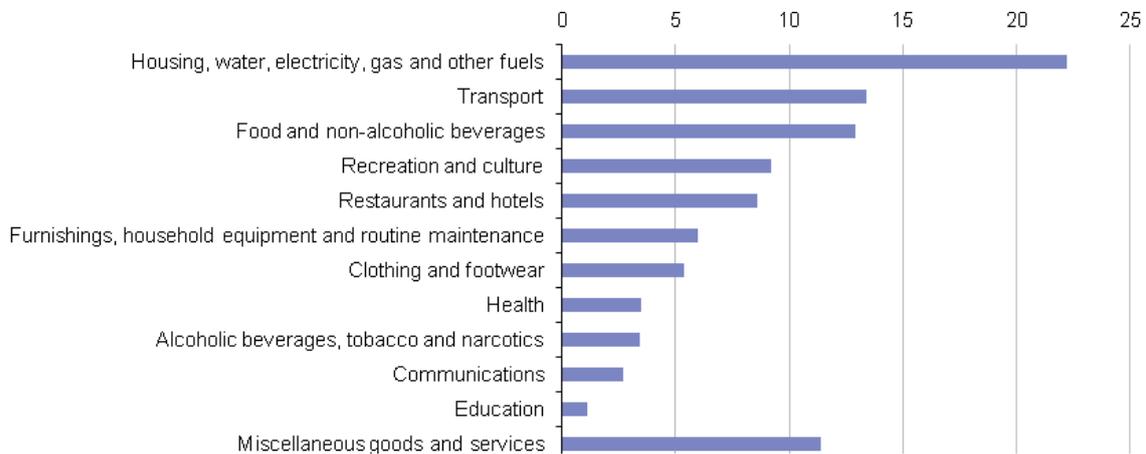
	Retail chains stores	Small stores / boutiques	Department stores
EL	44%	91%	21%
ES	46%	46%	30%
BE	65%	42%	11%
UK	65%	30%	38%
EU 15	59%	52%	32%
EU 27	56%	50%	31%
MAX	94% (IE)	91% (EL)	80% (IE)
MIN	23% (BG)	23% (LT)	7% (PT)

Annual expenditure on clothing and footwear averaged EUR 800 per person in the EU-27 in 2006, with national averages ranging from EUR 100 per person in Romania to EUR 1200 per person in Italy. For the majority of Member States, average expenditure in 2006 did not change much compared with 2000.



The following table and diagram present the consumption expenditures of households in Europe (4, 8) per main categories.

Economy and finance	
National accounts - GDP	
Consumption expenditure of households, EU-27, 2008	
(% of total household consumption expenditure)	
Housing, water, electricity, gas and other fuels	22,2
Transport	13,4
Food and non-alcoholic beverages	12,9
Recreation and culture	9,2
Restaurants and hotels	8,6
Furnishings, household equipment and routine maintenance	6,0
Clothing and footwear	5,4
Health	3,5
Alcoholic beverages, tobacco and narcotics	3,4
Communications	2,7
Education	1,1
Miscellaneous goods and services	11,4



2.7. The Children's Fashion Sector in Europe

The European childcare products industry has a €28,000 million annual turnover, employing over 350,000 citizens through more than 10,500 companies, 90% of which are SMEs. Childrenswear sums up a 75% of this whole industry.

The European SME childrenwear products community is facing serious and prolonged competitive pressure from manufacturing bases outside of the EC, specifically strong price competition for equivalent products from Low Labor Costs countries. This has made trading extremely difficult for products manufacturers and has led many of these SMEs into bankruptcy or acquisition during the last years and to a loss of market share. It is becoming clear that we will not maintain our market share by competing on price alone, and in any case, this has proven to be extremely difficult to achieve, particularly where quality and leadtimes are constantly improving in these locations. It is therefore imperative that we develop new innovative products, with additional features and benefits, to differentiate the products technically. Cutting down costs has showed to be insufficient and not sustainable by itself for European companies if not accompanied by wider product differentiation and continuous innovation strategies. Despite fashion (where Europe is the world leader) and price (where LLCs have their main competitive advantage) have traditionally been the main buying drivers for this kids products, children ergonomics and environmental concerns are increasingly becoming more important for parents in mature markets.

3. UK REPORT

Much of the information in this report has been taken from various UK government sources. Children's wear is not a separate category but is included within textiles and apparel, footwear and leather goods are listed separately. There are independent market research surveys but these have to be purchased at considerable cost. The two main ones do not hold the same views concerning the potential growth of the sector. Included in this report are extracts from each of these. Also included is intelligence gathered through various meetings and discussions with employers.

3.1. *Structure of the Children's Fashion Sector in the UK*

3.1.1. Introduction

The UK market for childrenswear, comprises clothing designed for children under the age of 14. The main sectors of the market include girls' clothing (ages 2 to 14), boys' clothing (ages 2 to 14) and infants' clothing (for under-2 year-olds). In 2010, the total UK market for childrenswear was valued at £5.91bn, after increasing by 6.5% from 2009.

Many factors have helped the growth of the childrenswear market; however, the necessity for children's clothing will always be the main influence. Other factors, including the fast growth rate of children and consumers disposing of or recycling clothes more frequently, rather than keeping them for other siblings, also have an impact on the industry as more items are being purchased. Furthermore, the growing child population has boosted sales in the industry, while the family structure has changed to benefit sales. Many parents are having children at an older age,

when they generally have a higher disposable income, while more families are having fewer children, resulting in an increase per capita being spent on children's clothing.

Sales slowed down considerably during the recession, owing to consumers being more cautious about spending, while many opted to shop at value and cheaper retailers. However, it is believed that consumers were more likely to cut back on luxuries for themselves rather than reduce their purchasing of clothing for their children during financial hardship.

The recent economic climate in the UK also affected a number of businesses in the children's clothing market. Both national and independent retailers were forced out of business, while value retailers benefitted from their lower pricing points. Despite this, prices of children's clothing have recently increased due to many factors, such as the global shortage of cotton, which saw the price of the raw material rise considerably, and the increase in value-added tax (VAT) in the UK in January 2011. The high cost of transportation and the current weak pound are also affecting the cost of clothing and imports into the UK. This has resulted in retailers being forced to increase prices at the tills; some believe these changes could further impact on the decline of the cheap clothing phenomenon.

The forecast period (2011 to 2015), estimates that the UK childrenswear market will witness continual growth. This will be achieved through an increase in prices, adding value to the industry, while the media will further help influence children's own opinions of clothing (wanting to imitate the latest fashion trends, etc.). Technological advances, including retailers having a greater presence online, will also boost sales. In 2015, Key Note estimates that the total childrenswear market will be worth £6.99bn.

3.1.2. General information that affects the children's fashion sector

The UK Office for National Statistics produces data and the information below is taken from excerpts of the various reports produced by this office.

Population data

- In 2012 there were 18.2 million families in the UK. Of these, 12.2 million consisted of a married couple with or without children
- The number of opposite sex cohabiting couple families has increased significantly, from 1.5 million in 1996 to 2.9 million in 2012. The number of dependent children living in opposite sex cohabiting couple families doubled from 0.9 million to 1.8 million over the same period
- In 2012, 38 per cent of married couple families had dependent children, compared with 39 per cent of opposite sex cohabiting couple families
- There were nearly 2.0 million lone parents with dependent children in the UK in 2012, a figure which has grown steadily but significantly from 1.6 million in 1996
- There were 26.4 million households in the UK in 2012. Of these, 29 per cent consisted of only one person and almost 20 per cent consisted of four or more people.

Family structure with dependant children

Number of families with dependent children	2012	
	Estimate	CI +/-
Married couple family	4,610	66
One child	1,903	60
Two children	1,991	54
Three or more children	715	31
Civil partner couple family	6	3
Opposite sex cohabiting couple family	1,131	47
One child	615	37
Two children	380	28
Three or more children	137	16
Same sex cohabiting couple family	6	3
Lone parent family	1,986	55
One child	1,139	46
Two children	607	32
Three or more children	240	19
All families	7,739	54
One child	3,663	78
Two children	2,983	59
Three or more children	1,093	34

Geographical split of population

	2011 population (thousands)
North East	2,597
North West	7,052
Yorkshire and the Humber	5,284
East Midlands	4,533
West Midlands	5,602
East of England	5,847
London	8,174
South East	8,635
South West	5,289
Wales	3,064
England	53,013
England and Wales	56,076

Family income

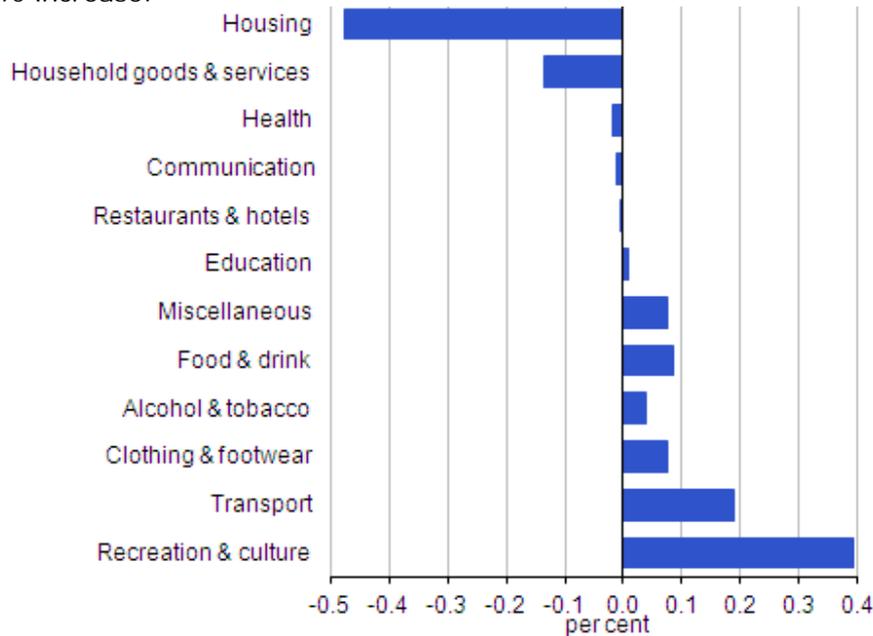
The average annual earnings of full-time workers in the UK rose by 1.4% to £26,500 in the year to April 2012. The figures have been published by the Office for National Statistics (ONS) in its annual survey of hours and earnings.



There was a cut in the real value of pay, however, as inflation was higher during the same period, at 3.5%. And the ONS data also reveals that inflation has outstripped the rise in average pay for the past 12 years.

Consumption per habitat

Spending by Product per consumer household is presented in the following diagram as a % increase/decrease in 2012, where clothing demonstrates an approximate 0,8% increase.



The following diagrams give details of expenditure per household and the clothing and footwear figures. It is clear that in the UK both garments and footwear expenditure is increasing almost constantly in the past 4 years.



0.CN Household final consumption expenditure														E million		
Summary																
Current prices - not seasonally adjusted																
UK NATIONAL ¹																
UK DOMESTIC ²																
	Total	Net tourism	Total	Food & drink	Alcohol & tobacco	Clothing & footwear	Household goods & services	Health	Transport	Communication	Recreation & culture	Education	Restaurants & hotels	Miscellaneous		
COICOP	-	-	0	01	02	03	04	05	06	07	08	09	10	11	12	
2008	875 806	13 489	862 314	77 580	30 539	49 224	188 336	45 918	14 534	125 835	17 049	99 258	13 341	86 678	114 022	
2009	860 434	9 510	850 924	79 238	30 891	48 912	195 619	45 006	15 494	122 407	17 418	96 225	13 170	82 619	100 930	
2010	909 959	8 033	895 926	81 670	32 154	51 632	209 814	46 440	15 796	130 221	18 668	98 939	13 578	89 045	106 089	
2011	934 570	5 979	928 591	84 544	34 649	55 517	222 424	46 884	16 911	132 924	20 890	99 245	14 062	93 364	107 237	
Percentage change, year on previous year																
2008	1.7		1.5	5.4	2.2	2.1	7.6	-2.6	-2.4	-0.5	-2.4	0.6	1.4	1.7	-4.5	
2009	-1.9		-1.3	2.1	1.2	-0.6	3.9	-2.0	6.6	-2.7	2.2	-3.1	-1.3	-4.7	-8.9	
2010	5.1		5.3	3.0	4.1	5.6	7.3	3.2	1.6	6.4	7.2	2.8	3.1	7.8	4.0	
2011	3.4		3.7	3.6	7.8	7.5	6.0	1.0	7.5	2.1	11.9	0.3	3.6	4.9	-0.8	
Not seasonally adjusted																
2010 Q1	214 867	1 658	213 209	19 447	7 383	10 912	54 432	10 780	3 755	31 931	4 476	22 828	3 358	18 754	25 173	
Q2	224 439	1 928	222 511	20 854	7 970	12 129	49 591	11 328	3 895	32 621	4 493	24 742	3 377	22 792	26 709	
Q3	238 712	4 433	234 279	20 181	7 842	12 555	48 418	11 576	3 895	35 488	4 680	24 498	3 416	24 481	27 248	
Q4	237 941	14	237 927	21 128	8 959	16 036	57 373	12 756	4 191	30 171	5 019	26 871	3 447	23 018	28 958	
2011 Q1	225 549	1 315	224 234	20 468	7 844	11 782	58 743	10 996	4 086	32 615	5 053	23 573	3 473	20 075	25 576	
Q2	229 383	1 722	227 661	20 887	8 477	13 256	52 920	11 371	4 189	33 152	5 034	24 776	3 501	23 683	26 415	
Q3	235 274	3 028	232 246	20 986	8 584	13 410	52 241	11 630	4 228	34 390	5 144	24 147	3 530	23 689	26 227	
Q4	244 364	-186	244 550	22 203	9 744	17 119	58 520	12 887	4 408	30 767	5 659	25 749	3 558	23 917	29 019	
2012 Q1	232 819	1 231	231 588	21 436	8 467	12 403	61 657	11 038	4 229	34 098	5 491	23 828	3 590	20 870	24 481	
Q2	237 778	1 862	235 916	21 768	8 714	13 447	57 481	11 885	4 214	35 125	5 437	24 616	3 620	24 611	24 998	
Q3	245 315	3 687	241 628	21 609	8 706	13 829	55 886	11 797	4 176	38 795	5 480	25 511	3 652	26 953	25 234	
Percentage change, quarter on corresponding quarter of previous year																
2010 Q1	2.7		2.9	2.1	3.3	-0.4	1.4	4.0	3.8	12.7	6.8	1.0	1.3	2.2	-1.5	
Q2	6.3		6.7	3.5	4.5	3.8	7.1	3.5	0.5	9.6	3.9	4.6	2.8	3.9	9.9	
Q3	6.0		5.9	4.4	2.7	7.8	7.6	3.4	0.1	9.2	9.3	3.6	4.0	8.9	5.7	
Q4	5.3		5.7	2.0	5.7	9.7	13.3	2.1	2.0	-1.4	8.6	2.1	4.3	9.4	2.4	
2011 Q1	5.0		5.2	5.3	6.2	7.5	7.9	2.0	8.8	2.1	12.9	3.3	4.0	7.0	1.6	
Q2	3.1		3.2	0.2	6.4	9.3	6.7	0.4	7.5	1.6	12.0	0.1	3.7	3.9	-1.1	
Q3	2.9		3.5	4.0	9.5	6.8	7.9	0.5	8.5	2.5	9.9	-1.4	3.3	4.9	-3.8	
Q4	2.7		2.8	5.1	8.8	6.8	2.0	1.0	5.2	2.0	12.8	-0.5	3.2	3.9	0.2	
2012 Q1	3.2		3.3	4.7	7.9	5.7	5.0	0.4	3.5	4.5	8.7	1.1	3.4	4.0	-4.3	
Q2	3.7		3.6	4.2	2.8	1.4	8.6	4.5	0.6	6.0	8.0	-0.6	3.4	3.9	-5.4	
Q3	4.3		4.1	3.0	1.4	3.1	7.0	1.4	-1.2	6.6	6.5	5.6	3.5	4.9	-3.8	

1 Final consumption expenditure by UK households in the UK & abroad
2 Final consumption expenditure in the UK by UK & foreign households

03.CN Household final consumption expenditure Clothing and footwear Current prices - not seasonally adjusted										€ million
Clothing and footwear										
Clothing							Footwear			
	Total	Total	Clothing materials	Garments	Other articles of clothing and clothing accessories	Cleaning, repair and hire of clothing	Total	Shoes and other footwear	Repair and hire of footwear	
COICOP	03	03.1	03.1.1	03.1.2	03.1.3	03.1.4	03.2	03.2.1	03.2.2	
	ADFP	ADFQ	ADUD	ADUR	ADUS	ADUT	ADFR	ADUV	AWTX	
2008	49 224	42 145	575	38 275	2 036	959	7 079	7 020	59	
2009	48 912	41 869	557	38 216	2 119	977	7 043	6 974	69	
2010	51 632	44 323	545	40 228	2 673	877	7 309	7 242	67	
2011	55 517	47 827	490	43 728	2 803	806	7 590	7 439	51	
Percentage change, year on previous year										
2008	2.1	1.9	6.7	1.7	-1.8	15.3	3.2	3.2	-	-
2009	-0.6	-0.7	-3.1	-0.2	-3.3	1.9	-0.5	-0.7	16.9	
2010	5.6	5.9	-2.2	5.3	26.7	-10.2	3.8	3.8	-2.9	
2011	7.5	7.9	-10.1	8.7	4.9	-8.1	5.2	5.5	-23.9	
Net seasonally adjusted										
2010 Q1	10 912	9 428	90	8 542	585	209	1 484	1 464	20	
Q2	12 129	10 410	153	9 454	585	218	1 719	1 701	18	
Q3	12 555	10 717	147	9 735	611	224	1 838	1 823	15	
Q4	16 036	13 768	153	12 497	892	226	2 268	2 234	14	
2011 Q1	11 732	10 157	131	9 265	542	219	1 575	1 562	13	
Q2	13 256	11 401	136	10 957	661	208	1 855	1 843	12	
Q3	13 410	11 502	121	10 528	665	188	1 908	1 896	12	
Q4	17 119	14 767	108	13 538	935	191	2 352	2 338	14	
2012 Q1	12 403	10 774	114	9 835	619	206	1 629	1 613	16	
Q2	13 447	11 599	99	10 606	698	196	1 848	1 834	14	
Q3	13 829	11 857	124	10 921	611	201	1 972	1 959	13	
Percentage change, quarter on corresponding quarter of previous year										
2010 Q1	-0.4	0.1	-5.2	-0.4	18.2	-18.4	-3.0	-3.2	17.6	
Q2	3.8	4.9	-5.6	4.8	15.4	-9.5	-2.5	-2.6	5.9	
Q3	7.8	7.9	-2.0	7.5	25.7	-5.5	7.0	7.1	-6.2	
Q4	9.7	9.4	3.4	8.0	41.4	-7.0	11.6	12.0	-26.3	
2011 Q1	7.5	7.7	-2.4	8.5	-7.4	4.8	6.1	6.7	-35.0	
Q2	9.5	9.5	-11.8	10.0	13.0	-4.6	7.9	8.3	-33.3	
Q3	6.8	7.3	-17.7	8.1	8.8	-16.1	3.8	4.0	-20.0	
Q4	6.8	7.3	-32.7	8.3	4.8	-15.5	3.7	3.7	-	
2012 Q1	5.7	6.1	-13.0	6.2	14.2	-5.9	3.4	3.3	23.1	
Q2	1.4	1.7	-26.7	2.0	5.6	-5.8	-0.4	-0.5	16.7	
Q3	3.1	3.1	2.5	3.7	-8.1	6.9	3.4	3.3	8.3	

- Number of retail shops – as mentioned above, a major trend for the retailing of childrenswear is via the multiples and retailers classed as grocery therefore the statistics available do not give an accurate reflection of the situation. The UK now has a successful market with out of town shopping centres where many of the grocery and multiple outlets are based. Some of the main reasons for the success of these out of town shopping centres is ease of reach, free parking facilities and long opening hours, seven days a week. There has been a lot of debate over these shopping centres with Councils being concerned over the “death” of the traditional high street shopping area. Pedestrianised areas and park and ride facilities have been used in an attempt to lure back the shopper. High business rates in the City/Town centres has meant that the small independent retailer has been driven away, with those that have survived tending to be in the more affluent suburbs where there are good facilities for families and good schools.

Consideration also needs to be given to the growth of on line shopping and mail order shopping.

The top retailers in the UK are the following:

Rank	Retailer	Turnover in UK 2011 in	Nr of
------	----------	------------------------	-------

		Million €	stores
1	Tesco	46,224	2,715
2	Sainsbury	24,314	934
3	Asda	23,794	523
4	Morrison	21,227	474
5	Co-operative	15,227	2,884
6	Kingfisher	12,041	492
7	Marks&Spencer	10,062	724
8	John Lewis	8,483	282
9	Boots	7,365	2,637
10	Home Retail	6,742	1,092

- Retail employment

Currently there are about 4,1 million people employed in 'Wholesale, retail & repair of motor vehicles' out of a total workforce of 29,7 million people. The positions of the total workforce is presented in the following table:

Jul-Sep 2012	
All	29.692
Managers & senior officials	4.821
Professional occupations	3.945
Associate professional & technical	4.495
Admin & secretarial	3.130
Skilled trades	2.995
Personal services	2.585
Sales & customer services	2.228
Process, plant & machine operatives	1.887
Elementary occupations	3.425

3.2. UK's Market Structure

Childrenswear declined by 1% in 2011 in value terms but grew 1% in volume terms. Grocery retailers maintained strong growth, aiming to outstrip high street retailers in sales of childrenswear. Grocery retailers held around 30% of the market in value terms in 2011, growing from 28% in 2010. Supermarket chains, such as Asda, Tesco and Sainsbury's, announced improvements in the design of their childrenswear in an effort to boost sales.

Geographical allocation of retail shops – as mentioned earlier, retail shops are in city and town centres and out of town shopping centres. These are spread throughout the UK. Rural areas are poorly serviced and people in those areas depend upon on line/mail order shopping or visits to the nearest city or town

List of the most important companies in children's fashion (clothes, footwear, retail) and % of market

Main retailers of Children's wear in the UK are:



- John Lewis (departmental store)
- Marks and Spencer
- Next
- George
- Mothercare
- Tesco (grocer)
- T.K.Maxx
- Argos (catalogue shop & on line shopping)
- Debenhams (departmental store)
- Sainsburys (grocer)
- Peacocks
- M&Co
- Asda (grocer)

4. BELGIUM REPORT

4.1. *Structure of the Children's Fashion Sector in Belgium*

4.1.1. Introduction

Belgium fashion sector has a great tradition in producing designers, and the proof is the number of formative centres devoted to it, highlighting the famous fashion departments of the Royal Academy of Fine Arts – Artesis Antwerp, the Royal Academy of Fine Arts Ghent and La Cambre Brussels.

Belgian fashion companies have differentiated from the other industries in the country by the prompt effect of the globalization on them, which made since mid 20th century defend themselves from the outer competition with more efficient production processes, with a replacement of labour forces by capital.

Nowadays, as an industry that demands creativity and innovation, it needs highly technically skilled workforce, but it is starting to meet a lack of sufficiently qualified personnel.

Industry

The local production of clothing industry, with data from 2011, shows a solid industry, although it has been decreasing its results as consequence of the international crisis. As an example, employment has decreased from 17.000 in 2007 to 15.000 in 2011. The number of companies has also decreased, in about 200, with approximately 500 in 2011. The industry of clothing reached a volume of 1.459 million euro in 2010. Net exports have traditionally in this sector a negative sign which continued in the last exercise, with 2.855,6 million euro for in exports and 3.133,0 in imports.

Customers

The domestic economy is characterized by high buying levels, with an average income of 40.000 € by family. The distribution of average expenses in fashion for a Belgian family is based in a total of 1.570 € a year, with a 74% dedicated to clothes, 21% to shoes and a 5% to different complements.

The last data for the distribution of clothing in Belgian families determined an average expense of 488 euro dedicated to women, 275 euro for men, and 231 for children. The expenses in clothing represent a an important consume for Belgian families.

Belgian fashion industry is normally characterized by a traditional and classic design, although likes vary depending on the region; the Flamands give more importance to the brand, and look for more original designs. The Wallons are more directed to French style. In general, they are aware of prices and quality.

Suppliers

Belgian market is considered one of the most opened in Europe. External suppliers in clothing market are mainly Chinese, which represent the 25% of imports, France with a 13%, Netherlands with an 11%, and Germany, with a 10%.

Distribution

In retailing there is a high competence in the market. Belgium is considered to be a "market test" for West and North Europe, so many foreign companies site in Belgium to test the acceptance of their products in the market.

4.1.2. General information concerning the children's fashion sector

Considering total family expenses in garments, during the past few years baby clothes have grown the fastest. By cons, clothes for girls are still the largest share of sales of children's clothing. The economic crisis has certainly had an impact on consumer behavior. If the economic situation continues to deteriorate, consumers say they will decrease their spending on clothing.

Although there is limited data on children fashion sector in particular, we can observe some data on trade exports referred to baby articles.

EXPORTS PER ARTICLE				
in 1000 euro	2009	2010	2011	%11/10
Baby-articles	24.629	23.891	25.397	6,3%
TOTAL	2.972.970	2.855.600	3.065.558	7,4%

IMPORTS PER ARTICLE				
in 1000 euro	2009	2010	2011	%11/10
Baby-articles	40.521	38.038	47.142	23,9%
TOTAL	3.407.947	3.132.952	3.453.436	10,2%

4.2. Belgium's Market Structure

The market for retail in Belgium had a total turnover of 5,887 million euro in 2010 in the textile and garment sector, with a growth of 3,3% respect the latest exercise. The distribution depending on the way of distribution is of 116 mm/€ in department stores, 216 in branches, 164 in other commerce and 185 retail stores.

Specifying in our sector of study, the figures below show the employment and number of stores in retail sale of baby and children clothing.

	Employment	Stores
2007	1.082	383
2008	930	361
2009	973	368



For the whole of fashion sector in Belgium there were 16,461 stores in early 2011, with 38,305 workers in the retail fashion, which represent 16% of employment in the retail.

Apart from buying in physical stores, 39% of customers buy clothes online. It is considered in the industry that finding qualified and motivated staff is a difficult task for the fashion industry too. It is a varied job that requires different skills: easy contact with clients, feeling commercial fashion sense, etc.

Considering retail in products for babies and children up to three years, the sector in Belgium employs 834 people in 2010, been one of the few sectors with growth in 2011, with an increase of 7.5 % in its turnover.

The level of e-commerce in Belgium lags behind neighboring countries. This is partly explained by the fact of a high regulation in business in comparison with other countries.

Distribution is usually through specialized retailers (Zara, H & M, C & A, Etam, Esprit, Benetton, Mango) in store sales, which represent approximately 60% of the market share. Department stores and variety stores occupy the second hand market (Inno and Hema). In recent years, there has been growth in the share of non-food in supermarkets and hypermarkets (Carrefour). Traditional independent small businesses are losing more and more ground.

Distance selling is performed by catalog or Internet (3Suisses, La Redoute). Despite its potential, the success of distance selling in Belgium is limited because of the high concentration of stores in a small area and strict rules relating to electronic commerce. Sector as catalog sales, he knows significant declines.

Sales in end of the season are subject to strict regulations. They are allowed only at certain times, in January for the winter sales in July and the summer sales.

5. SPAIN REPORT

5.1. *Structure of the Children's Fashion Sector in Spain*

5.1.1. Introduction

Supply Structure

The garment industry in Spain comprises about 10,150 companies, which employ approximately 54,500 employees and freelancers, both indicators maintain their downward trend for more than a decade.

In late 2011 there were around 1,401 companies operating in the footwear sector, a figure that has been recorded in the recent years as downward trend, so now the weak demand and before the deslocalization has resulted in the closure of more than 300 companies since 2009. The production in 2011 stood at 94.8 million pairs of shoes, identical to that recorded in 2010, halting the downward trend that the industry had been experiencing. The value of shoe production stood at 1,572.4 million euro at the end of 2011 with an increase of 1.3% over the previous year, reversing the negative trend since 2006, the year in which the value of production was 2,059.0 million euro.

Demand

Between 2007 and 2011 the annual expenditure per capita on clothing in Spain fell a 22%, from the 564.4 to 440 euro per year. The greatest decrease in average spending occurred between 2008 and 2009 when it was reduced expenditure per capita in 53.9 euro, from 535.4 to 481.5 euro annually. Between 2010 and 2011 was when the decline was smaller and the Spanish inhabitants only reduced their 15 euro budget. The child consume most of families budget devoted to clothing. Between 2007 and 2011, this segment has reduced its budget by 22.5% to 532.4 euro per year per child. Four years ago, the average cost per child per year stood at 687.2. Which still represents the second highest percentage of women is spending. The consumers have reduced their spending by 21% since 2007, from EUR 601.9 to 475.4 spend per year a fashionable woman. Men are on average spending less on fashion and more have reduced their budget between 2007 and 2011. The male consumer spending has dropped by 24.2% in four years, rising from 488.3 to 370.2 euro annually.

Between 2007 and 2011 the annual per capita expenditure on footwear in Spain has remained stable at around 39 euro. The greatest decrease in average spending occurred between 2008 and 2009 when the payment was reduced 3 euro per capita, from 40.3 to 37.3 euro per year. Between 2010 and 2011 was when the decline was smaller and Spanish residents only reduced their budget in 7 euro cents.

5.1.2. General information concerning the children's fashion sector

Structure of demand **Nativity**

After a period 2000-2008 characterized by growth interrupted of birth in 2009 there was a change in trend, according to official estimates will remain until 2020. This unfavorable behavior is associated with the current economic situation and, in parallel, declining foreign population in Spain, at a time where is increased the return to their countries of origin. Thus, it is noteworthy that recent developments in fertility differs Spanish women and foreign residents in Spain, had lower average number of children per woman in the first case, around 1.33 - 1.64 against foreign women. The decline in the birth rate began in 2009 continued in 2010, 484,055 children this year, a 2.0% less than in the previous year and 2011, with the figure of 490,380 in this case children, a 1.3% over the previous year.

Child population

The population under 14 years at the end of 2011 amounted to 7.1 million people, representing 15.1% of the total census. By gender, approximately 51% of the population was Infant children, that is, 3.6 million children, which accounted for 15.7% of the male population, for their part, 3.4 million girls had a slightly lower weight on female population, with 14.5% of the total. For ages, the three age segments considered are about the same weight, no differences by sex. Thus, 35.1% of children less than 4 years 33.8% between 5 and 9 years, and the rest is aged between 10 and 14 years.

Expenditure on goods and services for children

According to the Consumer Expenditure Survey, household spending on clothing and children's footwear has fallen by 12.9% between 2007 and 2011, from 5776.8 to 5030.33 million euro. This expenditure represented, in 2011, 35.8% of spending on goods and services for children, having lowered down about four percentage points from 2007, reflecting the increase in the heading of education and related services.

The participation of the child clothing in the total value of infant clothing and footwear expenditure is has increased slightly in recent years, from 75.9% in 2007 to 76.4% in 2011, year amounted to 3840.85 million. Meanwhile, spending on children's footwear has past 1.395.05 million euro in 2007 to 1.189.48 million in 2011, which represents an average annual change of -5.2%. The average expenditure per capita on child clothing has gone from 98.2 euro in 2007 to 83.7 euro 2011, representing a reduction of about 15 euro, for his part, per capita spending on children's shoes fell between 2007 and 2011 at 5.4 euro, reaching 25.9 euro.

Structure of the offer

Productive activity clothing and children's footwear is developed in Spain from about 300 companies. The turnaround in the performance of sales recorded since 2008 has resulted in the disappearance of manufacturers, sometimes middle dimension. The business community is characterized by being composed mostly of mid and small size Spanish capital and shareholding purely familiar. By segment, about 80% of companies were principally engaged in manufacturing children clothing while 9% are focused on children's shoes, the rest being devoted to other activities, among which stands layette.

Manufacturers of children's clothing and footwear base industrial develop activities organized around a well-defined production process that are not necessarily concentrated in a specific geographical area, although there is a high business

concentration in the Mediterranean coast, which accounts for over 70% of the national total.

Production

The group of manufacturers of children's clothing and footwear ended the year 2011 with a turnover of almost 750 million euro, 2.7% less than in 2010, a year that ended with a turnover of 770 million euro. By segment, infant clothing account for 62.5% of the value of sales of clothing and children's shoes, children's shoes followed, with 13.8%, and baby clothing, with 13.7%

The above trend of clothing and footwear sector was due to children very negative Sales performance in the domestic market, in a context of paralysis of domestic consumption, which in 2011 resulted in a fall in turnover of 14% compared to 2010. By contrast, exports of children's clothing and footwear grew 21% which allowed to increase their weight in the total turnover, rising in 2010 to represent 33% sales to 41% in 2011.

In this regard, it is noteworthy that 7 out of 10 companies sold abroad to an average of 5-6 countries. Specifically, about 81.9% of associates who have exported during 2011 have led their products to the EU market, this fact on the one hand makes the product manufactured in value but, on the contrary, involves a risk too dependent on the evolution of this market.

Behind the European Union is North America (Mexico, Canada and the USA. UU.), which meets 6.7% of sales abroad. It follows further from the rest of Europe extra-community-with special reference to the Eastern European countries. The EU remains the main destination of Spanish products for children between which continues to lead the ranking countries such as Italy, Portugal, United Kingdom and France. To note is the fact that from the top ten countries that have implemented their brand clothing companies and children's footwear are two non-European. Thus, the number of companies exporting to Mexico and Russia is a recognition the ability of the Spanish business by opening new markets outside the Community

5.2. SPAIN'S MARKET STRUCTURE

Clothing - Distribution structure

In a scene of closing of small businesses and slower pace of openings in major retail chains, the total number of point of sales specialized in marketing garments and home textiles fell by about 13,000 between 2006 and 2011, reaching a late last year at 60,248 in just one year, missing a total of 650 points sales in this segment, and in 2010 the total stood at 60,898 stores. Subsidiary chains dominate the domestic market, while the formula franchise is primarily used to undertake international expansion projects, while has also been adopted by several low cost chains in Spain. In the industry there is a trend towards corporate concentration. The top five operators met in 2011 a share of the total market of 57.2%, a percentage which reached 67% when considering the top ten.

Evolution of retail sales

The deterioration of household disposable income has marked the recent evolution of sector clothing retail, impacting negatively on sales and causing growing demand orientation towards products with low price. The total turnover of the sector has remained stable, with a timid increase of 0.6% in the last three years. In 2009, the

distribution of clothing moved 15,300 million euro in Spanish market, up from 15,350 million euro 2010 and 15,390 million euro of 2011. The slight revenue growth while market points of sale disappear is due to the realignment of market shares by channel. While department stores and hypermarkets and independent distributors decreased in the last three years, specialized chains are growing, and only saw their business affected 2009, with a decrease of 2.6%.

Retail establishments with less volume -independent retailers- have gone from representing 14.9% of the total business in 2009, to 12.6% in 2011. In 2009, trade making independent business added a total of 2,320 million euro a figure, two years later, stood at 1,940 million euro, representing a decrease of 3% compared to 2010. This channel enchains three continuous years of declining sales, with consequent loss of weight over the total sales. By contrast, specialty chains have been expanding in four perceptual points since 2009, its market share at the expense of small businesses primarily independently to reach 58% in 2011, with net income of 8920 million euro, 1.9% more than in the previous year. This is the only format that grows in Spain while independent retailers and department stores and hypermarkets reduce sales since 2009. Department stores and hypermarkets and supermarkets maintained their shares virtually stable in the market in 2011, although sales have also been reduced. In 2009, 4,700 million euro contributed to the whole sector, a figure that in 2010 came to 4,600 million euro in 2011 and decreased to 4530 million euro. Thus, this surround channel has gone from 31% of total business to 29%.

Footwear - Distribution structure

Recent years have been characterized by the disappearance of a large number of independent specialized shops and by the expansion of the network operators of greater dimension, resulting in an increase of consolidation. In March 2011, around 10,000 specialized places operated in the sale of shoes, corresponding to about 24% of total specialty chain. The sectoral trade workload generated at that date 30,000 workers.

In the industry there is a trend towards corporate concentration. The top five operators met in 2010 a share of total market of 24.4%.

Evolution of retail sales

In the 2009-2010 biennium footwear retail sales were penalized by the contraction of private consumption or price suppression. Thus, the retail market for footwear recorded in 2009 and 2010 declines of 8% and 3%, respectively, reaching 2.900 million in the last year. Specialized chains recorded a turnover of 800 million euro in 2010, concentrating 28% of the total value of retail sales, about two percentage points in 2008.

Independent shoe stores were the most affected by the negative economic situation, recorded in 2010, with a decrease of 7.6% in its turnover, estimated at up to 1.022 million. The market share of these operators fell by five points percentage between 2008 and 2010, rising from 40.5% to 35.2% last year. The specialized distribution (hypermarkets, department stores, focusing on distribution of clothing and other establishments) met 37% of the market in 2010, accounting for a decrease of 1% in the last year, reaching a figure close to the 1,100 million euro. By product segment, women shoes gets most of the retail market, to represent about 55% of the total in 2010. The men's footwear accounted for about 25% of sales, the remaining 20% correspond to children's shoes.

CHILDREN

Structure of the distribution

Infant clothing sales have gained weight in the overall market articles of clothing, focusing in 2011 just over 14% of its total value. In 2011 the structure was maintained traditional channels for the products sector childhood that sells its products mainly in multibrand retail independent.

Chain stores are the main distribution channel for infant clothing, concentrating in 2011 51.9% of total market value, having risen more of 3 percentage points compared to 2009 then the department stores and hypermarkets met a combined share of 41.5% 42.1% in 2009 - 9.3% being the participation of other channels. The distribution trends have been marked by an expansion of the market share chains of stores, producing in parallel a specific weight loss of independent retailers. On the other hand finds a steady increase in the importance of e-commerce both through their own online stores as sales platforms, which has gone from concentrate in 2010 to 1% to over 3% in 2011, representing sales of 33 million euro. Thus, sales of children's clothing and footwear represent 6.9 & Billing added in 2011 web pages with content specific fashion for Spain

Evolution of retail sales

After growth rates of between 2% and 3% annually in the period 2003-2007, the value of infant clothing market during 2008-2009 accused to contraction of family spending, posting declines of 3.5% in 2008 and 4.5% in 2009, reaching the latter year to 2,100 million euro.

The infant clothing market stood at 2,090 million euro in 2011, which represented an increase of 0.5% on the figure recorded in 2010. Despite this trend, infant clothing sales have gained weight in the overall market for apparel products, accounting in 2011 for just over 13.8% of its total value, about a percentage point higher than the percentage in 2007. About 55% of the market value of infant clothing is in the hands of national operators, the remaining 45% corresponding to foreign companies, whose business in Spain generally focuses on the exploitation of point of sales sold the mainly imported garments.

The deterioration in domestic demand has led in recent years the disappearance of a large number of small independent companies, boosting the degree of concentration supply in the sector. The top five operators met in 2011 a share of the total market of 42.3%, which reached 59.0% when considering the ten first.

By segment, the clothing boy / girl aged 2 to 14 years concentrated around 80% of the total market value of infant clothing, corresponding the remaining 20% of baby clothes up to 2 years. This last segment has increased its stake in sales in recent years, driven by the increase in the birth and expansion of the offer by companies operating in the market.

SWOT Analysis for the children's fashion retailing sector in Spain.

– 2 WEAKNESSES	STRENGTHS
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	<ul style="list-style-type: none"> · Funding problems · Low professionalization in management in many cases · Weak bargaining power 	<ul style="list-style-type: none"> · Communication with important SMEs in the country · Experience
ENVIRONMENTAL	THREATS	OPPORTUNITIES
	<ul style="list-style-type: none"> · Safety standards differentiated by country supplier · Recession in domestic market · Decline in consumption and finance · Decline in birth rate 	<ul style="list-style-type: none"> · Support structure in 2014-2020 horizon · Sector resistant to the crisis · Positive cultural patterns

6. GREECE REPORT

6.1. *Structure of the Children's Fashion Sector in Greece*

6.1.1. Introduction

The apparel industry is one of the most important manufacturing sectors in the Greek economy. A traditional sector that was developed strongly during the decades of '70 and 80' being based mainly on the low labor and production costs, export subsidies, and on the outwork exports in Europe. By the end of the '90s and more over after the year of 2000, has started the gradual decline for the most of the sector's economic indicators. That is caused because of important changes that took place in the international environment and had adversely affected the Greek apparel industry. Some of the main causes are the trade liberalization of the apparel and textile products, the dynamic development of new producing countries from Asia, the accession of China in the World Trade Organization (WTO) that led the country later into explosive growth rates, the accession of countries by the former Eastern Europe to the European Union and finally the stagnation of consumption in many European markets.

The shrinkage of the apparel industry was greater during the decade of 2000, mainly for the export industries. At the time period after 1995 was recorded a significant downturn in production and employment mainly because of the production process' transfer to the neighboring countries in Balkan for taking advantage of the low labor costs.

In contrast though, the decade of 2000 was very creative for the industries focused on the domestic market. The great increase at the domestic demand in conjunction with the orientation of the industries to the commercial field led the sales of the domestic brands to a significant increase. However, from early 2009 onwards the continuous deterioration of the Greek economy has negatively influenced the industries operating in the domestic market in an even greater extent than the exporting ones.

Number of companies

As has been mentioned above, the number of companies began to decrease steadily after 1995. That year the number of apparel companies (of any form, even those with only one employee) was 14.420. In 2011 the number of companies was reduced to 5.198. During the period 1995 – 2011 the number of the sector companies declined by 64%.

Year	Number of industries	Variation %
1995	14.420	-
2000	14.480	0,40%
2005	12.430	-14,20%

2010	5.842	-53,0%
2011	5.198	-11,0%

Employment

Corresponding decline was also noted to the employment of the sector. In 1995 the number of employees in the apparel industry exceeded the 100.000 persons and specifically that number was 101.809 persons. After 1995, with the exception of year 2000, there was a steadily reduction in employment. In 2011 were employed 23.553 persons in the sector. That means that within 16 years were lost over than 78.000 jobs or else the 77% of the employees at the year 1995 in the apparel sector.

The main reasons of the continuous decline were three:

- First reason, as regards the number of employees and also the time period that this had happened, is the relocation of the production activity to the neighboring countries of the East Europe because of the low laboring cost.
- Secondly, the competition from countries of Asia, especially China, that led to a reduced employment. Also, caused closures and job losses.
- Third reason was the economic crisis that affects Greece since 2009, something that contributed to a loss of about 20.000 jobs over the last three years.

Year	Employees	Variation %
1995	101.809	-
1996	93.919	-7,74%
1997	87.576	-6,75%
1998	83.219	-4,97%
1999	73.376	-11,82%
2000	80.975	10,35%
2001	75.351	-6,94%
2002	71.530	-5,07%
2003	69.117	-3,37%
2004	53.449	-22,66%
2005	52.491	-1,79%
2006	51.777	-1,36%
2007	44.253	-14,53%
2008	41.059	-7,21%
2009	36.640	-10,76%
2010	26.240	-28,38%
2011	23.553	-10,24%

Turnover

The monitoring of turnover is done by using indicators and not with absolute numbers for statistical reasons. As base year for the Hellenic Statistical Authority (ELSTAT in Greek) is considered the year 2000 (2000=100). With the exception of year 2007, from 2005 to 2011 is recorded a continuous drop in the apparel industry turnover. The loss is intensified during the year period 2010 – 2011 with total losses of about 38%.

TURNONER INDEX OF CLOTHING

Year	2005	2006	2007	2008	2009	2010	2011
Index	86,2	82,7	87,1	77,0	73,5	57,4	48,3
Variation	-	-4,10%	5,40%	-11,70%	-9,30%	-21,90%	-15,80%

If would be separated the turnover of industries that are activated in the domestic market with the turnover of exporting industries, seems that the year period 2010 – 2011 the biggest problem were facing the industries of the domestic market. In a 3 year period, 2009 – 2011, those industries have lost over the 50% of their turnover.

TURNOVER INDEX OF DOMESTIC MARKET

Year	2005	2006	2007	2008	2009	2010	2011
Index	99,6	97,3	100,9	93,5	87,4	63,7	50
Variation	-	-2,30%	3,70%	-7,40%	-6,80%	-24,10%	-22,10%

Production

In the mid 90's, started the gradual transfer of the manufacturing process of Greek industries to neighboring countries of the Balkan region (Bulgaria, FYROM, Albania, Romania, Turkey). That situation, led the production of apparel to a continuous recession.

Furthermore, the growing tension of the manufacturing industries in converting to service providers and also into commercial companies led to the transfer of the manufacturing process in Asian countries (mainly in China). This aggravated even more the apparel production in Greece.

From 2005 onwards where the Hellenic Statistical Authority has started to consider as base year the production indicator (2005=100), the apparel production showed an actual precipitation. Between 2005 and 2011, the production in Greece reduced by 74%.

The last three years 2009 – 2011, firstly because of the global economic crisis and subsequently because of the crisis in Greece the value of production of apparel in the country reduced by 70%.

PRODUCTION INDEX

Year	2005	2006	2007	2008	2009	2010	2011
Index	100	108	99,7	82,3	64,4	48,3	36
Variation	-	8,00%	-7,60%	-17,40%	-21,60%	-23,10%	-25,40%

Retail sales

Approximately, 27% of retail companies in Greece sell clothing and footwear companies and they also represent about 27% of employees (including shop owners) of the total employment in retail.

The value of the retail sales in apparel in Greece showed an increase at the time period 2000 – 2005 that exceeded annually an average of 4% spurred by the continuous increase of the Gross Domestic Product and per capita income.

This tension continued until 2009 before the introduction of the economic crisis in Greece. The biennial 2010 – 2011 was very bad for retail sales of apparel in the domestic market since they were precipitated by 42%.

VARIATION OF THE INDEX OF THE RETAIL SALES APPAREL

Year	2005	2006	2007	2008	2009	2010	2011
Variation	-	3,40%	4,20%	-3,00%	3,90%	-21,90%	-19,80%

The following table presents the statistical data regarding the number of companies, the employment and the turnover in clothing and footwear retailing in Greece (estimation from KEAK-SEPEE(10)). The numbers clearly demonstrate a large reduction of companies and employees as well as turnover.

Year	Retail shops	Companies	Employees including owners	Employees	Turnover (m €)
2007 (*)	clothing	20.926	58.249	30.388	4.644
	footwear	5.613	13.324	6.930	1.090
2011 (**)	clothing	15.473	45.082	22.692	3.862
	footwear	4.208	10.049	5.266	906
2012 (**)	clothing	12.137	35.645	18.334	3.090
	footwear	3.283	8.670	4.548	725

(*) Source: ELSTAT

(**) Source: KEAK – SEPEE estimations

External trade

The apparel industry was for years the most important export sector of the Greek Economy and also one of the few having a positive trade balance. The decline of the industry sector led to a continuous and steady reduce of the exports. The parallel increase of the imports led firstly to a reduction of the positive trade balance and after 2004 caused the conversion of the trade balance to negative.

Exports – Main countries

The year 1997 was the best year for the Greek apparel exports with a value of 1.483 million euro. Between the years 1997 and 2000 the value of the apparel exports was ranged between 1.400 and 1.470 million euro. From 2000 onwards started the gradual reduction of the value of Greek exports. Between the years 2000 and 2011

the value of the Greek apparel exports declined by 62%, from 1.469 million euro in 2000 to 553 million euro in 2011.

VALUE OF THE GREEK APPAREL EXPORTS (IN MIL. €)

YEAR	EXPORTS	VARIATION
1995	1291	-
1996	1292	0,07%
1997	1483	14,78%
1998	1400	-5,59%
1999	1402	-0,14%
2000	1469	4,77%
2001	1306	-11,09
2002	1258	-3,67%
2003	1365	8,50%
2004	1246	-8,71%
2005	1080	-13,32%
2006	971	-10,09%
2007	913	-5,97%
2008	784	-14,12%
2009	639	-18,49%
2010	604	-5,47%
2011	553	-8,44%

Source: KEAK-SEPEE (10)

Regarding the two main subcategories of the apparel exports, the category of the knitted garments was by far the most important for Greece compared to the category of woven garments. However, the decline of the apparel sector that affected negatively the exports, has influenced more the exports of the knitted garments while the exports of woven garments stayed approximately at the same level as in 2007.

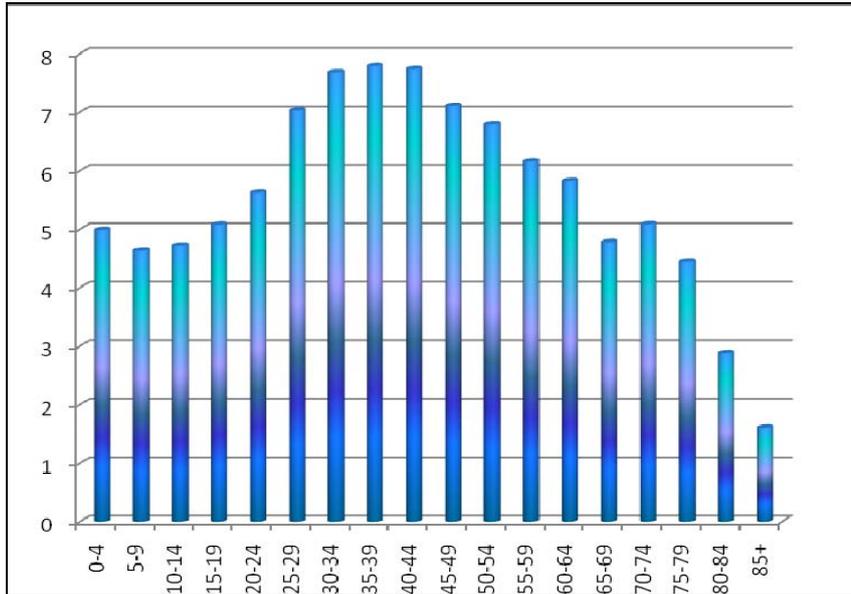
GREEK APPAREL EXPORTS (IN MILLION €)

	2011	2010	2009	2008	2007	VAR. '11/'07
Knitted garments	394,9	438,7	470,2	586,7	727,2	-45,7%
Woven garments	157,5	162,7	168,5	197,3	158,6	-0,6%
Total garments	552,4	601,4	638,7	784	912,8	-39,5%

The most important markets for the Greek apparel products are basically Germany (162 mil. €) and are following Cyprus (64 mil. €), Italy (40 mil. €), United Kingdom and France (31 mil. € each), Spain (18 mil. €) and Holland (14 mil.€). Finally having a 6 mil. € value of exports, are following Belgium, Austria, Switzerland and Turkey. An increase in exports between the years 2011 – 2010 is noticed in Germany (2,6%), Italy (13,8%) and a larger increase in Spain (15,2%) while the larger reduces in exports are noticed in Belgium (-19,6%), in France (-21,7%) and in the United Kingdom (-28%).

Population Pyramid

Age population (2009) ELSTAT				
	Males	Females	Total	%
Age groups	5.587.096	5.695.655	11.282.751	100,00
0-4	290.774	272.359	563.133	4,99
5-9	269.809	252.952	522.761	4,63
10-14	273.616	259.049	532.665	4,72
15-19	295.918	277.285	573.203	5,08
20-24	330.095	304.562	634.657	5,63
25-29	413.801	379.739	793.540	7,03
30-34	450.040	416.917	866.957	7,68
35-39	451.175	427.696	878.871	7,79
40-44	441.216	432.046	873.262	7,74
45-49	399.535	402.785	802.320	7,11
50-54	378.459	388.414	766.873	6,80
55-59	341.498	353.040	694.538	6,16
60-64	314.768	343.032	657.800	5,83
65-69	247.805	291.488	539.293	4,78
70-74	253.809	320.123	573.932	5,09
75-79	217.473	284.541	502.014	4,45
80-84	137.224	188.133	325.357	2,88
85+	80.081	101.494	181.575	1,61



According to statistical surveys of family spending on clothing the official total sales in 2007 are around € 7 billion, attributable to different regions as follows:

Geographic breakdown of population (persons)		Monthly spending on clothing per family (€ in 2007)
Attica (including Athens)	3,761,810	145
Continental Greece and Euboea	829,758	109
Peloponnese	1,155,019	106
Ionian Islands	212,984	99
Epirus	353,820	116
Thessaly	753,888	133
Macedonia (including Thessaloniki)	2,424,765	135
Thrace	362,038	98
Aegean Islands	508,807	118
Crete	601,131	117
Greece Total	11,237,068	130

Spending on clothing has been reduced considerably in the past three years, mainly due to the financial crisis.

Consumption (m €)		
Year	Clothing	Footwear
2009 (*)	6.350	1.779
2010 (**)	4.828	1.133
2011 (**)	3.862	906
2012 (**)	3.090	725

(*) Source: ELSTAT

(**) Source: KEAK – SEPEE estimations

6.1.2. General information concerning the children's fashion sector

The Children's fashion sector in Greece corresponds to approximately 25% of the total fashion sector, in terms of turnover, employment, and number of companies. That means that the turnover of retail shops in 2012 as approximately 773 m€ for children's clothing and 181 m€ for children's footwear.

The following table presents the most important Greek companies in the children's fashion sector in terms of turnover for 2011.

	Turnover of production 2011
1. LAPIN HOUSE	21.845
2. ALOUETTE	17.067
3. FRAGOS	15.281
4. MAYORAL	14.198
5. ENERGIERS	12.023
6. SAM	5.384
7. TRAX	3.620
8. LAVRENTIADIS	3.401
9. SPRINT	3.346
10. GOTZAMANIS	2.961
11. HARITIDIS	1.952
12. KOLLIS	1.286
13. PICCOLO MONDO	1.275
14. SOTIROPOULOS	1.178
15. GELATO	1.077
16. HARAKIDIS	611
17. THERA - RAVANIS	375
18. DAIRI	200

The children's fashion sector has been influenced by the financial crisis. The top 10 (in turnover) companies financial results demonstrate a 3rd year in a row of reduction of turnover. 2011 reduction was about 12% in comparison to 8% in 2010 and only 3% in 2009. Nevertheless, the reduction was less in comparison to other segments of the fashion industry.

6.2. Greece's Market Structure

The financial crisis appeared not to have dramatically affected the habits of the consumers as far as childrenswear is concerned, since children clothes are considered as being a necessity since children grow up continuously, 'buying' them can be considered as a psychological boost for the mothers, who at the same time prefer to cut some of their personal expenses rather than from their children's needs. Moreover, a large percentage of needs in children's clothes is covered from presents by friends and family, which makes the total expenditure not so unbearable.

In addition, the Greek market offers a wide range of products including some that are considered of low price, which appear to increasingly achieve a strong relationship with consumers, e.g. Zara.

At the same time, the financial crisis has trained mothers to:

- think as smart buyers, i.e. to be looking for the best quality in relation to price.
- To reduce spontaneous buying
- To limit the buying of children wear in order to get the clothes that a child needs for a season
- To wait for the sales, especially for mothers that have more than 2 children.

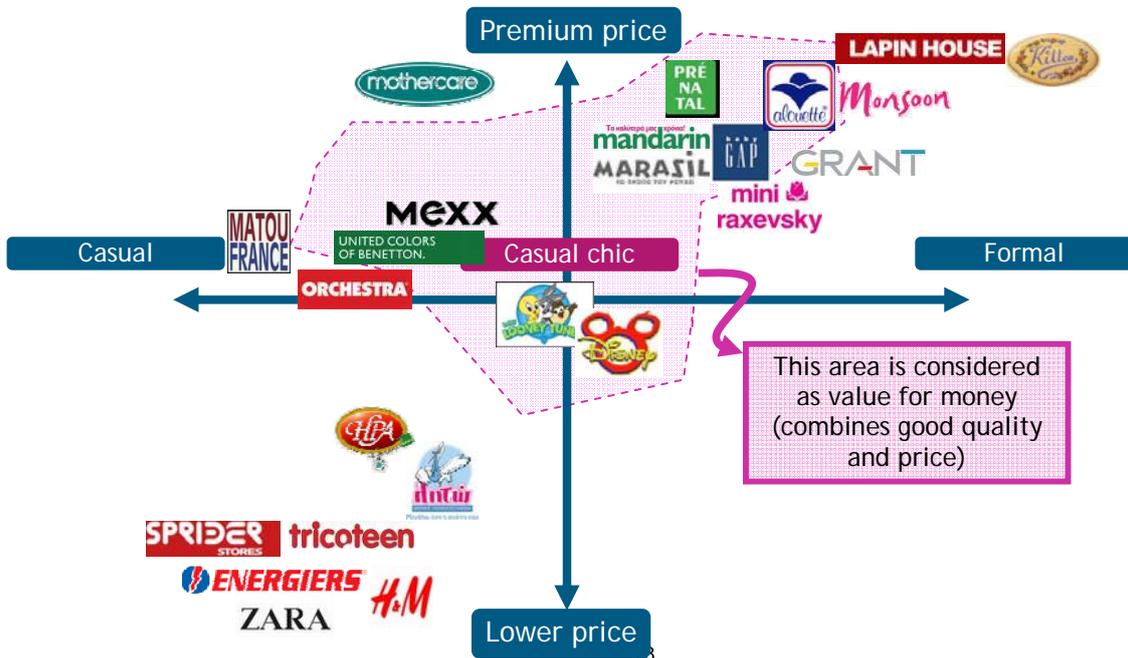
The selection criteria in childrenwear are related to the following parameters.



Criteria which when are met create a good 'word of mouth' for the corresponding brands:

- Price is more related to the households' needs rather than the financial crisis and defines the nature of clothes and the range of retail shops that the mother will visit.
- Quality includes attributes such as: washing strength (does not fade, etc.), easy to iron, soft tissues, eco-friendly, etc.
- Variety (which is missing in boys wear) is related to a wide selection of colours, interesting details, matching accessories, etc.
- Proximity: near the house or the shopping areas that the mother usually visits for her personal shopping.

Childrenwear Brands in Greece



Categorisation of brands:



Taking in account the changes in the international environment and the domestic economic situation of Greece, the strategic options from the Greek companies are the following:

A. For the private label companies

Those companies are based on the long term collaboration with the European customers, in flexibility, in sort delivering times and in the good ratio price/quality. Strategic options for the private label companies are:

1. The reduction of the administrative and production cost. The outsourcing of the "expensive operations" in Greece or in Bulgaria.
2. The approach of new customers in the E.U. or in other countries.
3. The orientation in new products of higher added value and also of better design.
4. The reduction, even more, of the lead time in the delivery of the products.
5. The emphasis on smaller orders, in flexibility and in custom service.

B. For the Greek brands

The companies of this category are in a much more difficult position because of the fact that their sales are orientated mainly in the domestic market. Strategic options for the Greek brands are:

1. Emphasize in exports. Given of the reduction in consumption and in retail sales of clothing in Greece at the last three years, the only way for the Greek brands is exports. The companies of that sector should organize their export departments with orientation in targeted markets, mainly in emerging countries.
2. Reorganization of their structure by reducing their administrative cost.
3. Reorganization of the distribution network. Reduction of the doubtful clients and reorganization of the retail network, so that would be created a safer environment.
4. Effort to reduce prices (wholesale-retail) through the reorganization of their structure and cost reductions.

7. CONCLUSIONS AND NEXT STEPS

The analysis of the economic structure and performance of the EU fashion industries has highlighted a number of important trends with respect to the competitiveness of the industry:

1. In the period 2004-2011 the overall EU fashion industry still is an industry in decline, characterized by significant job losses. Despite the clear difference in dynamics between the manufacturing sub-industries and distribution sub-industries, the positive trend in distribution has been insufficient to compensate for the important losses in manufacturing. Especially, in the period 2009 – 2012, due to the financial crisis in Europe, retail sales have faced considerable reductions, which cannot be quantified yet.
2. The evolutions in the structure of both types of activities (manufacturing versus distribution) point to significantly different drivers of industrial organization underlying these evolutions. Whereas the geographical spread of manufacturing activities is primarily driven by cost considerations, the location of distribution activities is mainly driven by consumer market developments.
3. For both manufacturing and distribution the competitive position is currently under pressure and fashion companies are faced with several challenges:
 - o On average, labour productivity is higher in other industries than in the fashion industries. Higher labour productivity normally is also reflected in higher wages. This puts pressure on fashion industries to increase labour productivity as well to be able to compete with other industries for the available skills in the labour market. Therefore, investing in increasing labour productivity is important for the industry to attract the necessary skills to remain competitive. As the EU fashion industries increasingly are on the outlook for higher skilled labour competition for human capital with other industries will only increase.
 - o In fashion manufacturing, many higher cost countries seem to have reached the boundaries of remaining competitive through productivity gains. Despite their above average level of productivity, they are not able to translate this sufficiently into profitable business. New models of competitiveness that are based on entrepreneurship, innovation and creativity are needed for the EU fashion manufacturing to remain competitive. In such growth model SMEs play a key role, as they often are engines for renewal and innovation.
 - o Despite a growing fashion distribution sub-industry in the EU, consumer market trends show that the European market for fashion is under pressure, with prices for fashion goods in relative decline and consumers spending relatively less on fashion. This pushes EU fashion companies to further internationalize and explore new markets.
4. For the children's fashion sector, the above mentioned challenges are important, since this sub-sector has managed to maintain a high level of competence in Europe despite the considerably difficult financial situation in Europe in the past years.



5. Finally, the retail sector, which comprises many different business models should reexamine the current situation and focus more on offering added-value services to the consumer. This calls for specialized personnel, which in particular for the children's wear sub-sector, should have particular skills and capabilities, which within the SCORE project will be analysed in WP2.

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