THE GLOBAL TEXTILE, CLOTHING, AND FOOTWEAR SUPPLY CHAIN IN EUROPE: STRUCTURE, TRADE FLOWS, AND RISKS

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Abstract: *This paper analyzes the structure, dynamics, and risks of the global textile, clothing, and footwear supply chain in Europe. For the purposes of this research, the analysis of textile, clothing and footwear import into Europe is limited to the European Union (EU-27) for two reasons: it is the most important market on the continent, and the second is the existence of comparable and official statistical data. The paper examines the transformation of the European fashion industry from local production to a globally distributed supply model, with Asian countries, in particular China, Bangladesh, and Turkey, playing a dominant role. The analysis indicates that these counties are the primary suppliers of textiles and clothing to the EU, whereas China, Vietnam, and Indonesia are predominant in footwear production. At the same time, the paper highlights the role of logistics hubs, such as Dubai, as a key transit point in the distribution of goods from Asia to Europe. Attention is paid to the risks arising from the global nature of the supply chain, including geopolitical tensions; disruption of transport routes such as the Suez Canal and the Red Sea; disruptions in transit hubs; rising energy prices; and the impact on the "fast fashion" model. These factors lead to increased transport and production costs, delays in deliveries, and reduced profitability of companies. The paper points to the need to diversify and increase the resilience of supply chains to better cope with global economic and geopolitical challenges.*

Keywords: textile, footwear, clothing, global supply chain.

GLOBALNI LANAC SNABDEVANJA TEKSTILA, ODEĆE I OBUĆE U EVROPI: STRUKTURA, TRGOVINSKI TOKOVI I RIZICI

Apstrakt: *Ovaj rad analizira strukturu, dinamiku i rizike globalnog lanca snabdevanja tekstila, odeće i obuće u Evropi. Za potrebe ovog istraživanja, analiza uvoza tekstila, odeće i obuće u Evropu ograničena je na Evropsku uniju (EU-27) iz dva glavna razloga: ona predstavlja najvažnije tržište na kontinentu, kao i zbog dostupnosti najkompletnijih i uporedivih zvaničnih statističkih podataka. Rad razmatra transformaciju evropske modne industrije iz lokalno zasnovanih proizvodnih sistema u globalno distribuiran model snabdevanja. U tom okviru, azijske zemlje, Kina, Bangladeš i Turska, imaju dominantnu ulogu kao ključni dobavljači tekstila i odeće za EU. U segmentu obuće, kao glavna proizvodna čvorišta izdvajaju se Kina, Vijetnam i Indonezija. Pored toga, studija ističe stratešku ulogu logističkih čvorišta poput Dubaija, koja funkcionišu kao važna tranzitna mesta u redistri-*

buciji robe iz Azije ka evropskim tržištima. Posebna pažnja posvećena je rizicima koji proizilaze iz globalizacije lanaca snabdevanja. Oni uključuju geopolitičke tenzije, poremećaje ključnih transportnih ruta kao što su Suecki kanal i oblast Crvenog mora, nestabilnost tranzitnih čvorišta, rast cena energije i sve veći pritisak na model brze mode (fast fashion). Ovi faktori doprinose povećanju troškova transporta i proizvodnje, kašnjenjima u isporukama i smanjenju profitabilnosti kompanija koje posluju u ovom sektoru. Rad zaključuje da postoji sve veća potreba za diverzifikacijom i jačanjem otpornosti lanaca snabdevanja kako bi se efikasnije odgovorilo na aktuelne globalne ekonomske i geopolitičke izazove.

Ključne reči: tekstil, obuća, odeća, globalni lanac snabdevanja.

1. INTRODUCTION

Fashion is an integral part of culture and is expressed through textiles, clothing, footwear, jewelry, interior design, and similar mediums [1]. It is a socio-cultural phenomenon that mirrors the authentic lifestyle, trends, and occurrences within society [2]. The fashion business is a global economic sector valued at 1.7 trillion dollars in 2023 [3] and employs well over 300 million individuals globally [4]. The textile, clothing, and footwear industries form an integrated system, with the supply chain of these sectors playing a crucial role. The fashion industry comes up with ideas for and makes products, giving them market value. The textile, clothing, and footwear industries, on the other hand, focus on making those products. The textile industry manufactures fibers, yarns, and materials; the clothing industry produces clothes, and the footwear sector makes footwear. The supply chain serves as a crucial mechanism linking all stages, from material sourcing to the end consumer [5].

The textile supply chain begins with the procurement of raw materials such as cotton, wool, or synthetic fibers, which are then processed into fabrics through processes such as spinning, weaving, and finishing. The materials are transported to clothing factories where the clothes are made [6]. The footwear supply chain encompasses materials including leather, rubber, fabrics, and synthetics, which undergo many production steps, including design, cutting, assembly, and final processing. In both cases, the supply chain is internationally distributed, with several countries specializing in specific stages of manufacturing [7].

This global supply chain is intrinsically connected to the fashion industry, which imposes demands regarding speed, cost, and aesthetics. Fashion brands and designers dictate trends, which creates the need for a flexible and efficient supply chain able to respond quickly to changes in demand. The advent of "fast fashion" has notably accelerated manufacturing cycles, hence intensifying the demand for suppliers and manufacturers, leading to challenges such as increased pressure to meet tight deadlines and maintain quality standards while reducing costs [8].

However, this complexity also brings risks. Dependence on global suppliers makes the system sensitive to health, economic, and geopolitical crises; transport disruptions; and changes in energy and raw material prices.

2. TRANSFORMATION OF THE EUROPEAN FASHION INDUSTRY: FROM LOCAL PRODUCTION TO GLOBAL SUPPLY CHAINS

The European fashion industry is one of the most developed and stable in the world. Europe is a leading design hub, a significant market for clothing consumption and a key factor in luxury fashion [9]. The value of the European clothing market exceeds 500 billion dollars [10], whereas the European luxury fashion market was estimated at €98 billion in 2023. European consumers are characterized by high textile consumption, 26 kg per capita per year [11], fast tracking of fashion trends, and extensive online shopping. In such conditions of strong demand and a developed market, the European supply chain has undergone significant transformations at different times.

During the 90 years of the past century, the fashion industry in Europe underwent a substantial transition in its supply chain due to economic globalization, trade liberalization, and technical advancement, moving from local and regional production to a globally distributed model. One of the key factors for this transformation is the liberalization of international trade, which allows for the reduction of trade barriers and the easier movement of goods and services.

Before the 1990s, the production of textiles, clothing, and footwear in European countries was local in their factories. For example, Italy, Spain, Germany, and France were hubs for high-quality textiles and clothing, while this region of Europe accounts for approximately 35% of global footwear production [12].

In the 1990s, economic globalization, trade liberalization, and technical advancements led to a substantial transformation of the supply chain in the European fashion sector, shifting from local and regional production to a worldwide-spread model. During this period, regional outsourcing took place, i.e., part of the European production of textiles, clothing, and footwear was moved to countries in Southeast Europe and the Western Balkans, including Bulgaria, Poland, Romania, the Czech Republic, and North Macedonia, due to lower costs and geographical proximity to the EU [13, 14, 15, 16].

In the 2000s, European brands moved production to Asian countries such as China, Bangladesh, Vietnam, India, and Indonesia because these countries offered even lower production costs [17]. During this period, the share of European countries in mass footwear production decreased to less than 3% [18].

In recent decades, since 2010, European fashion companies have continued to diversify their supply chains. The EU has been looking for alternative markets close to Europe and is shifting towards North Africa. This does not mean replacing Asia but rather the enhancement of the supply chain through the integration of proximate neighboring markets that are more flexible, have faster delivery times, and are less susceptible to global disruptions, such as the coronavirus pandemic [19]. Despite the significant role of neighboring regions in the supply chain of the European Union, Asian countries continue to dominate as the main source of textile and clothing imports, accounting for around 60% of total imports. This confirms the leading role of the Asian region in supplying the European market [20].

3. ANALYSIS OF THE IMPORT AND SUPPLY CHAIN OF TEXTILES, CLOTHING, AND FOOTWEAR IN THE EU

Although the analysis in the paper refers to the European market, due to the availability and consistency of statistical data, the paper uses data for the European Union (EU), which is the largest and most economically significant part of Europe. The main exporters of textiles and clothing in Europe are Asian countries, and according to the World Integrated Trade Solution (WITS), the largest suppliers of textiles and clothing to the EU in 2023 are China, Bangladesh, and Turkey, with values of US$ 35.959 billion, US$ 19.216 billion, and US$ 16.071 billion, respectively [21].

In 2023, these countries comprised the predominant portion of EU imports of textiles and clothing, with India, Pakistan, and Vietnam also contributing significantly [21, 22]. China, as the number one exporter to the EU, predominates in textile and clothing exports. Bangladesh is the European Union's second-largest supplier of ready-made clothing. Turkey is the third largest supplier of clothing, specifically knitted garments, to Europe [23]. These three countries are the EU's largest partners for textiles and clothing. The Asian countries, China and Bangladesh, have an advantage in terms of price, while Turkey has an advantage in terms of speed and geographical proximity.

The primary suppliers of footwear to the EU are China, Vietnam, and Indonesia. Data from the World Integrated Trade Solution (WITS) indicates that in 2023, the European Union will predominantly buy footwear from China, Vietnam, and Indonesia. China leads with a share of US$11.214 billion, succeeded by Vietnam at US$5.951 billion, and Indonesia at US$1.793 billion [24].

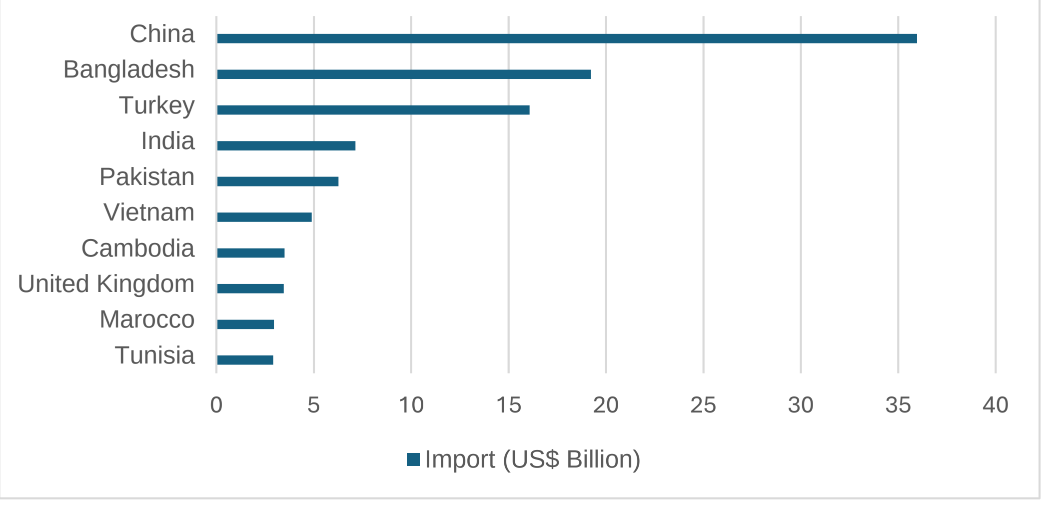

Figure 1: EU imports of textiles and clothing

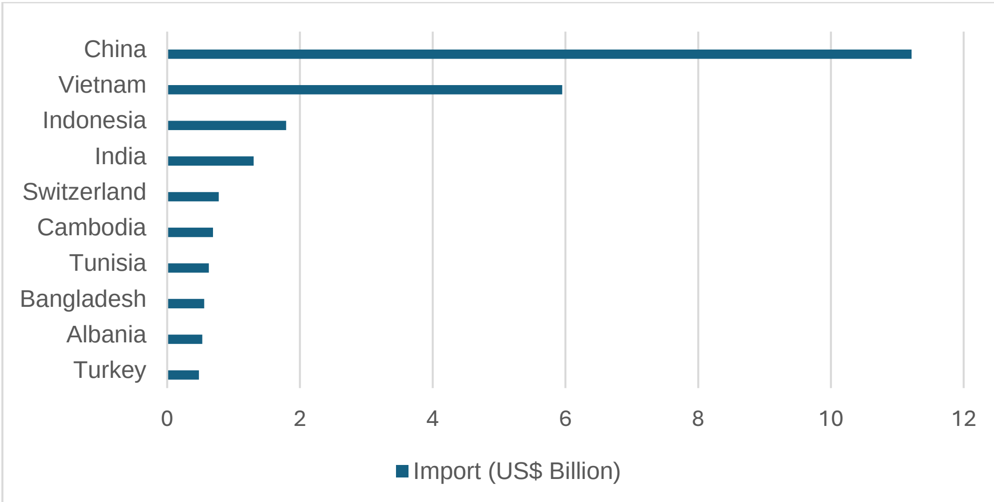

Figure 2: EU imports of footwear

In 2024, the European Union recorded substantial imports of textiles and clothing. China held a dominant position in the import structure, with a share of about 28% of total imports. This was followed by Bangladesh and Turkey, which were also key suppliers to the European market. In 2024, these three countries will still be the EU's main partners for buying clothes and textiles. This shows how important they are to the global supply chain [25, 26]. The same year, China, Vietnam, and Indonesia are the largest exporters of footwear to the European Union, indicating a similarly concentrated supplier structure [27]. In this period, these countries are dominant in the supply of footwear, thanks to the reduction of labor costs and to the high level of industrial specialization, which allows them to achieve high volumes of goods at competitive prices, thus satisfying the demand of the European Union.

The analysis indicates that China is the main supplier of textiles, clothing and footwear to the European Union in 2023 and 2024, which strengthens its dominant position in the global supply chain and its importance as a strategic trading partner for Europe.

The geographical distribution of suppliers requires the establishment of a complicated, multi-phase supply chain, which extends from Asia to Europe. The functioning of this chain begins in the producing countries, where textile products and footwear are manufactured, subsequently followed by their distribution via essential logistics hubs. In this context, Dubai is becoming a major transit and distribution center in the global supply chain.

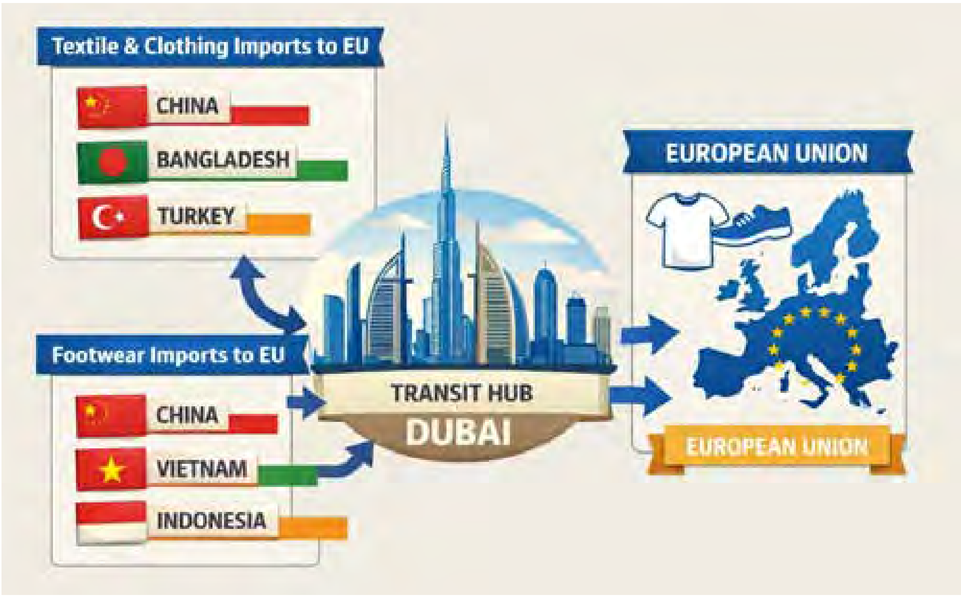

Figure 3: Multi-phase supply chain of textile, clothing, and footwear

Products from Asian markets are often sent to Dubai, where they are stored in modern logistics centers, repackaged, rebranded, and made ready to be sent to European markets in smaller shipments. Because Dubai is strategically located between Asia and Europe, re-export logistics can be done quickly and easily. In addition, developed infrastructure, such as the Jebel Ali Port Authority (the largest port in the Middle East) and the Dubai Airport Free Zone, enables a high level of transport efficiency, storage, and distribution. The favorable regulatory regime, which includes low or non-existent customs duties, as well as the absence of value-added tax on re-export, further reduces costs for companies and increases the attractiveness of Dubai as a global logistics hub [28].

4. RISKS POSED BY GLOBAL TEXTILE, CLOTHING, AND FOOTWEAR SUPPLY CHAIN

- The interruption of transportation pathways is a critical element of the global textile, clothing, and footwear supply chain.

The disruption of essential transportation routes constitutes a major concern in the global textile, clothing, and footwear supply chain. The prospective blockade of the Strait of Hormuz is particularly significant, as it is one of the world's crucial commercial routes for the transportation of a substantial amount of global oil and goods. In addition, increased risk in the Red Sea and the Suez Canal complicates the transport dynamics between Asia and Europe, with these routes being crucial for global trade and containerized cargo transport. Consequently, shipping companies are forced to reroute shipping routes around Africa, resulting in an extension of delivery times by approximately 10 to 15 days and an escalation in transport costs [29-33].

- Disruption of transit hubs.

The disruption of transit hubs poses a significant threat to the global textile, clothing, and footwear supply chain, especially given their essential purpose in linking production markets in Asia with consumer markets in Europe. The Persian Gulf region, encompassing Dubai, serves as a vital logistical center for the re-exportation and distribution of products. Such disruptions have a direct impact on the efficiency of the supply chain, as a significant portion of goods are stored, processed, and re-exported through Dubai. As a result, supply predictability is reduced, further increasing the vulnerability of the global supply chain [29-33].

- The increase in energy prices is indirect, yet the impact is significant.

This increase immediately impacts the energy-dependent textile sector. Rising energy prices result in elevated production costs due to increased electricity and fuel expenses, as well as a rise in the pricing of synthetic fibers. As polyester and plastic are petroleum derivatives, their prices climb considerably during an energy crisis. Consequently, the overall production costs escalate, which reverberate across the entire supply chain and influence the ultimate pricing of textile products and footwear on the market [29-33].

- Challenges within the Fast Fashion Concept.

Also, such diversions result in a decrease of container transit capacity and the appearing of a slowdown in global logistics networks. These delays adversely affect the textile and apparel industries, where fast delivery is essential. In the context of "fast fashion" models, such disruptions lead to delays in seasonal collections, interruptions in sales cycles, and a decrease in the competitiveness of enterprises within the European market [29-33].

- Increasing product prices.

The increase in transport prices directly affects the total cost of logistics operations. As a result, the final prices of products, especially clothing and footwear on the European market, increase. At the same time, companies face a decrease in profitability, as part of the increased costs cannot be fully passed on to consumers. This creates additional pressure on fashion brands to optimize their supply chains and seek more efficient and resilient logistics solutions [29-33].

5. CONCLUSION

The global supply chain for textiles, clothing and footwear in Europe is highly globalized and largely dependent on Asian suppliers, with China, Bangladesh, and Turkey dominating the textile and clothing segment and China, Vietnam, and Indonesia in footwear production. This model allows for competitive prices and efficient production, but at the same time it increases the vulnerability of the European market. Geopolitical tensions, disruptions of transport routes and crises in key transit hubs directly affect the stability of supply. Additionally, the rise in energy prices and logistics costs increases the pressure on companies and reduces their profitability. Therefore, further diversification of suppliers, development of regional alternatives and increased resistance to the supply chain is necessary to ensure its long-term stability and functionality.

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