

European T-shirt Supply/Demand Report



2009

Knitted Hosiery. Workwear. Outerwear. Sportswear. Knit Babywear. carpets & rugs. Brassieres. Pyjamas. Socks. Bed linen. Table linen. Kitchen Linen. Men & Boy's Knitted T-shirts. cotton trousers. cotton-wovens. swimwear. knitted dresses & shirts. Dresses. Skirts. Wool Jumpers. Curtains. Coats & Mittens. Handkerchiefs. Overcoats. Ties. Denim Trousers.

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**European T-shirt
Supply/Demand Report
2009**

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Introduction

The supply and demand for T-shirts in Europe is more complicated than it might at first appear. Per capita consumption of this seemingly ubiquitous and straightforward product shows a great deal of variation across Europe and the prospects for future growth are equally mixed.

Within the product group, the nature of the demand for T-shirts has changed over time and is forecast to continue to do so. There is currently a trend away from T-shirts and vests worn as undershirts towards T-shirts for everyday and fashion clothing: the evolution appears present to some degree or other in most countries in Europe, albeit to differing degrees. Some recent market developments are also very important, in particular the widespread and strong increases in availability that followed both the end of global textile quotas and EU enlargement.

The most significant market development of recent times is the continuing financial crisis and recession. But just as we have been forecasting a slow down in the volume of apparel consumption across Europe for the past five years, our modelling technique can also help shed some light on when the volume of supply and demand might likely recover.

The information presented in this report covers the market for T-shirts in almost all European countries (and we hope the revised issue, scheduled for publication later this year, will include the missing countries of Albania, Bosnia & Herzegovina, Serbia & Montenegro and TFYR Macedonia). We use a combination of summary text, tables and graphics to show some possible short-term movements and long-term forecasts. Nowadays only a few seem willing to forecast beyond a few years, or perhaps do make long-term forecasts but only in specific areas of interest. But we understand the complexity of home textile and apparel markets and believe the more accurate approach is a holistic one. In this report you will find forecasts to 2015 for market supply and for consumer demand.

The information is taken from our detailed analysis of the European textile and apparel market, this undertaken by Xavier Research Limited, and made available through **Textrends.org**, a subscription-based Internet information service. A little more information on Textrends.org can be found at the back of this report, or you might like to visit the website www.textrends.org for a more complete explanation of our work.

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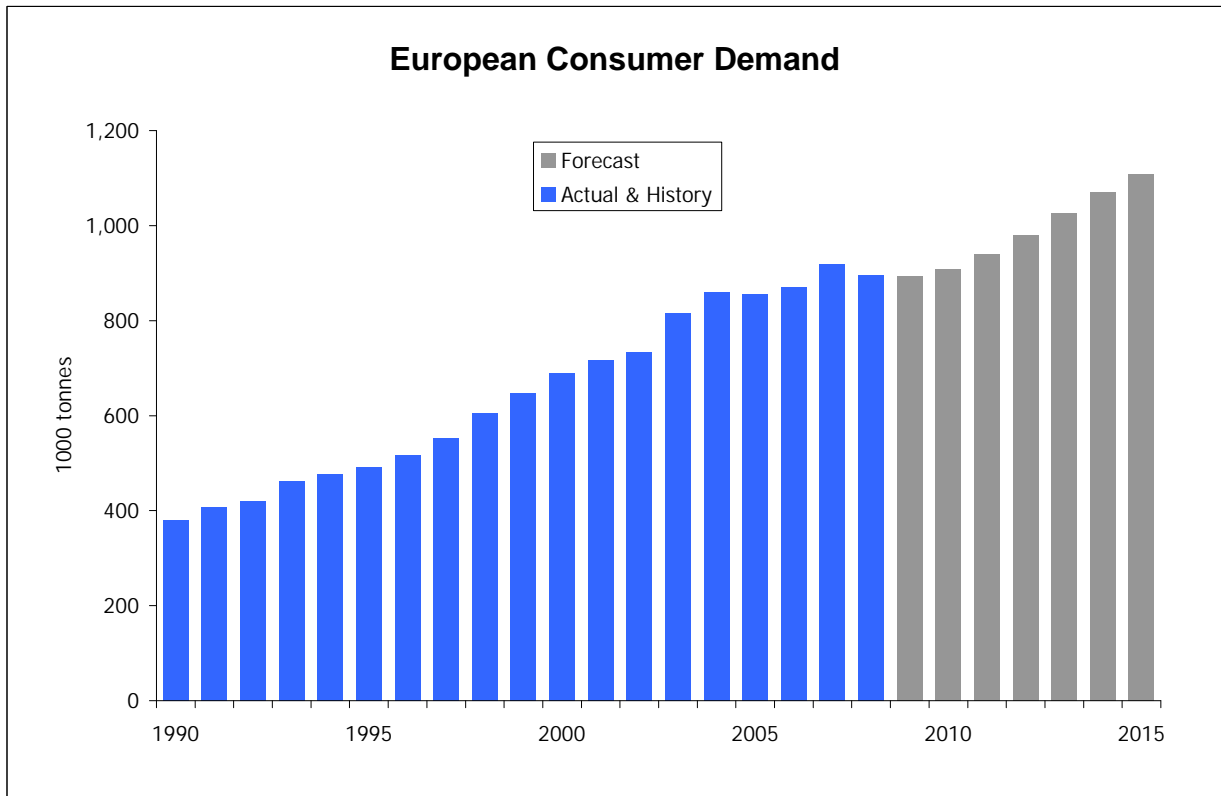
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Executive Summary

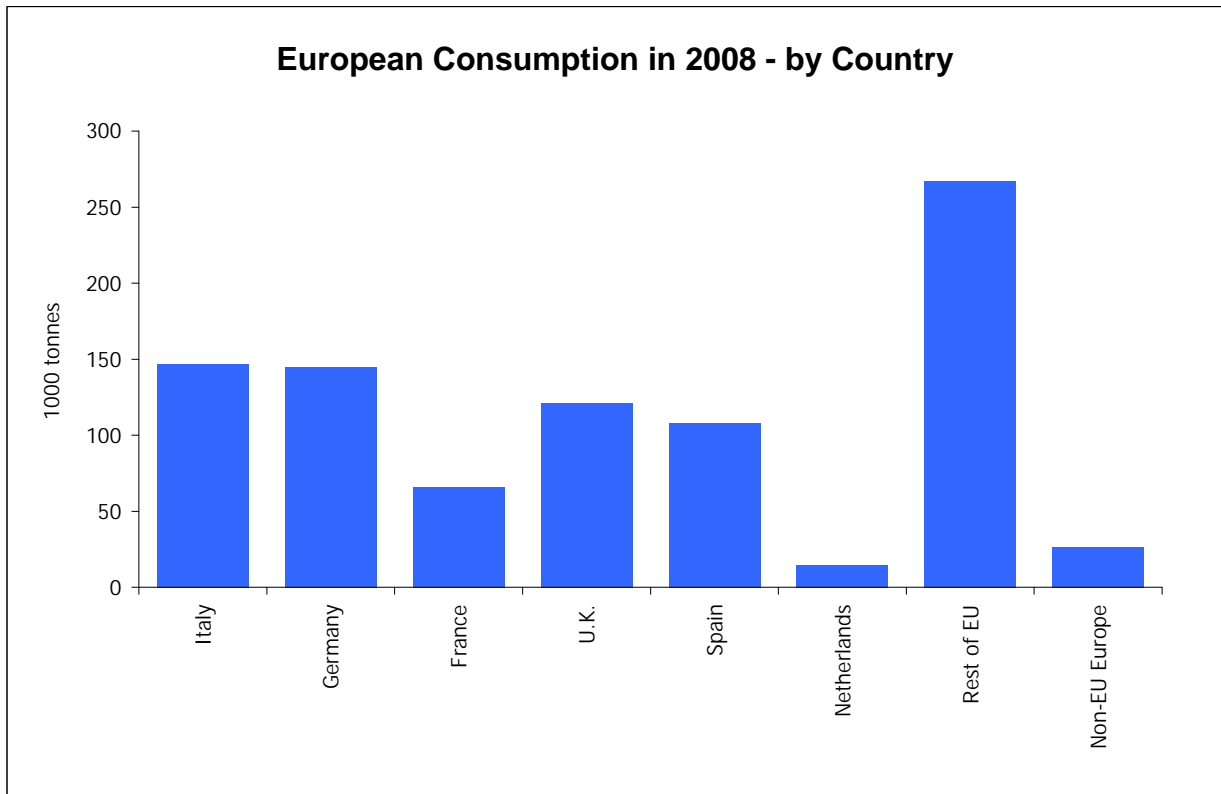
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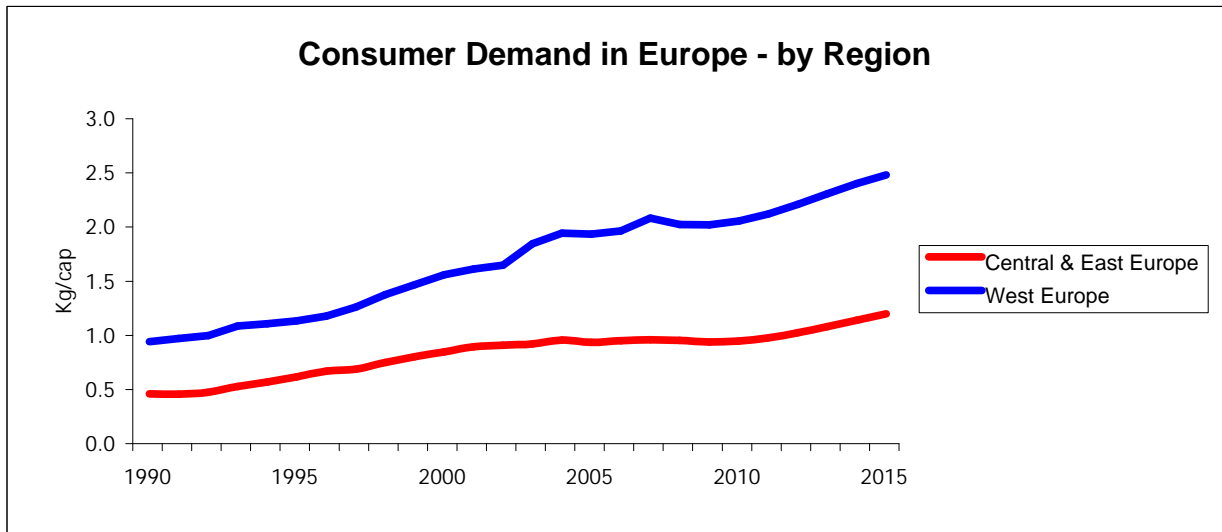
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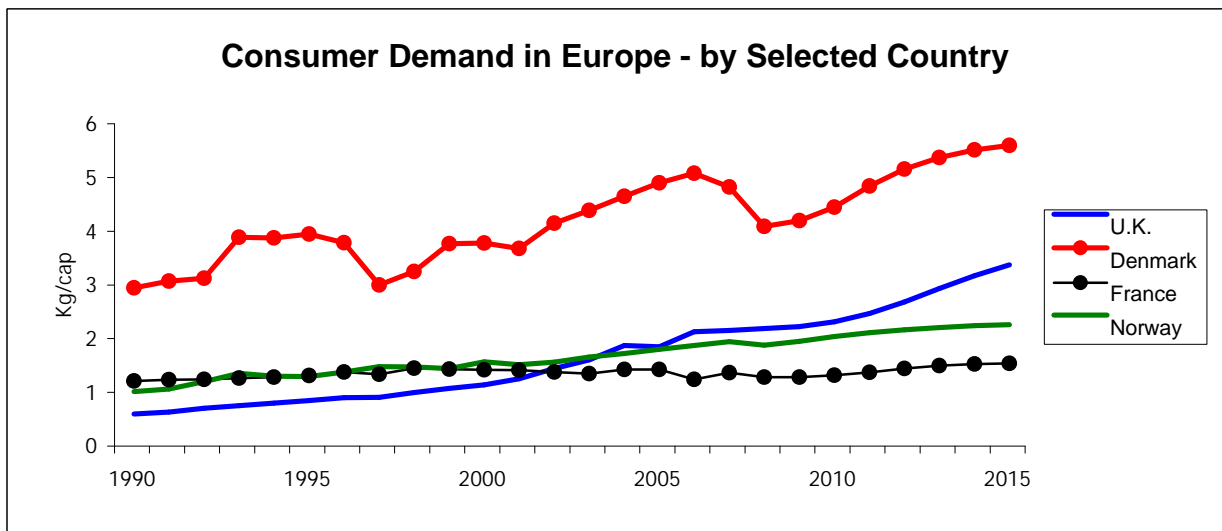
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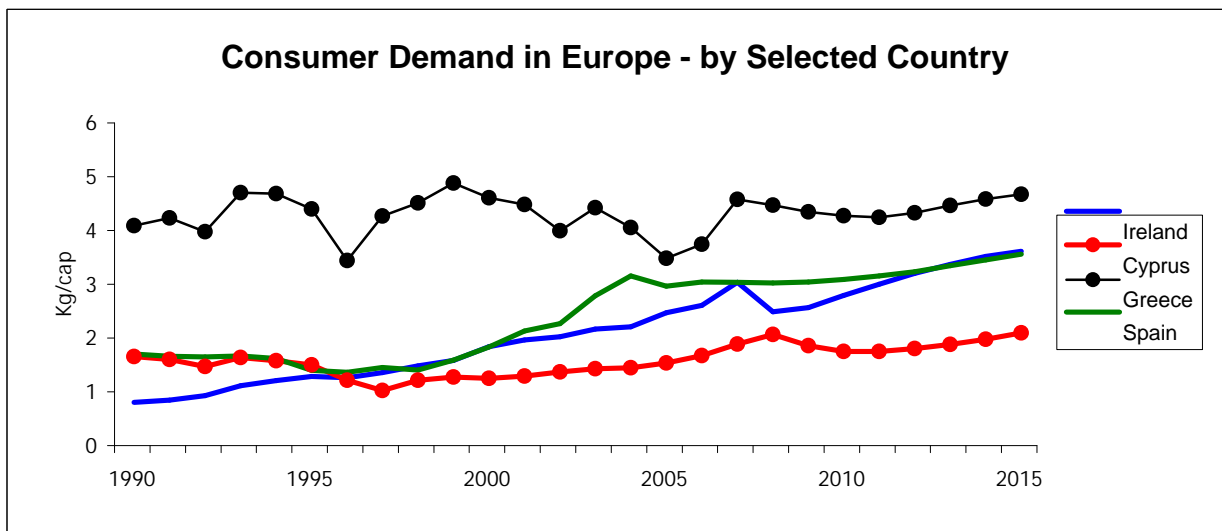
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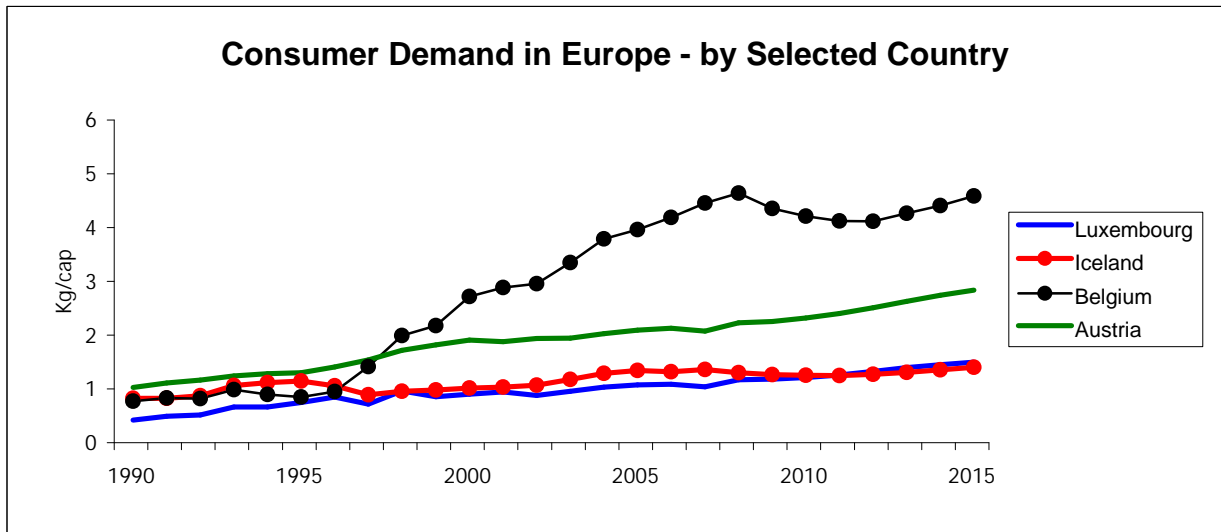
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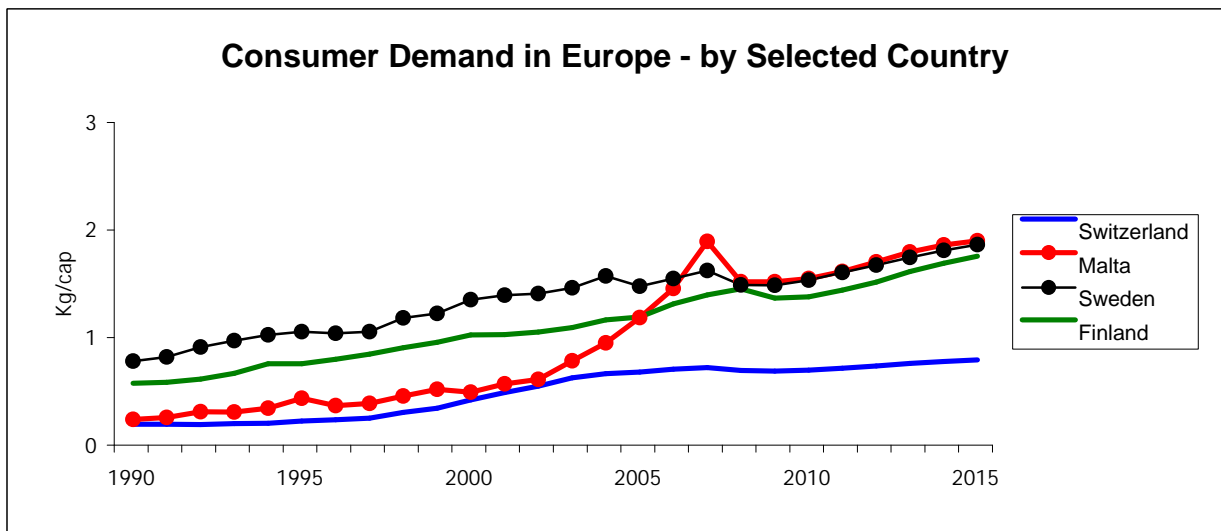
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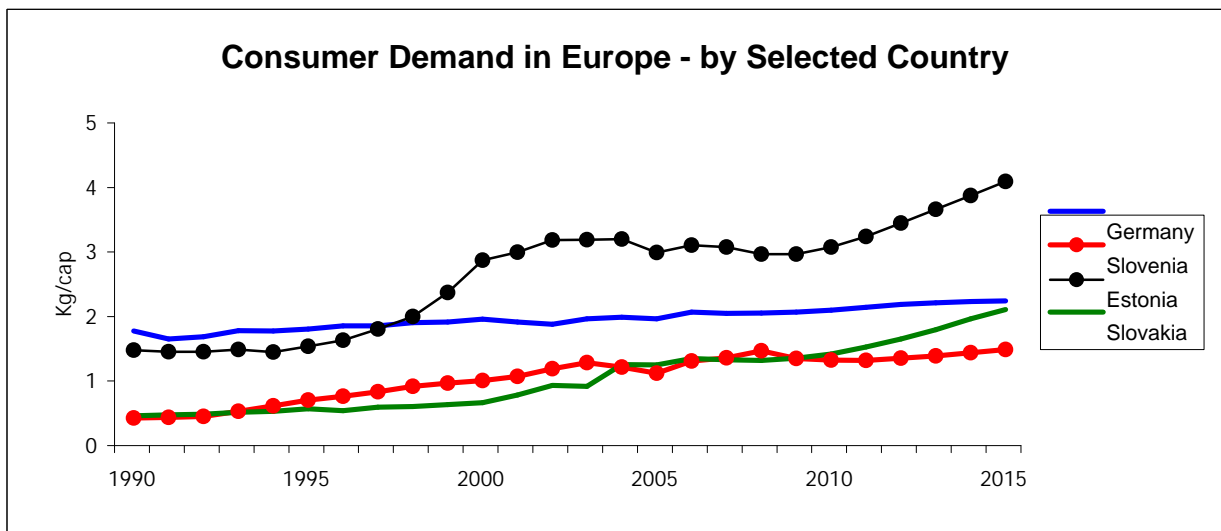
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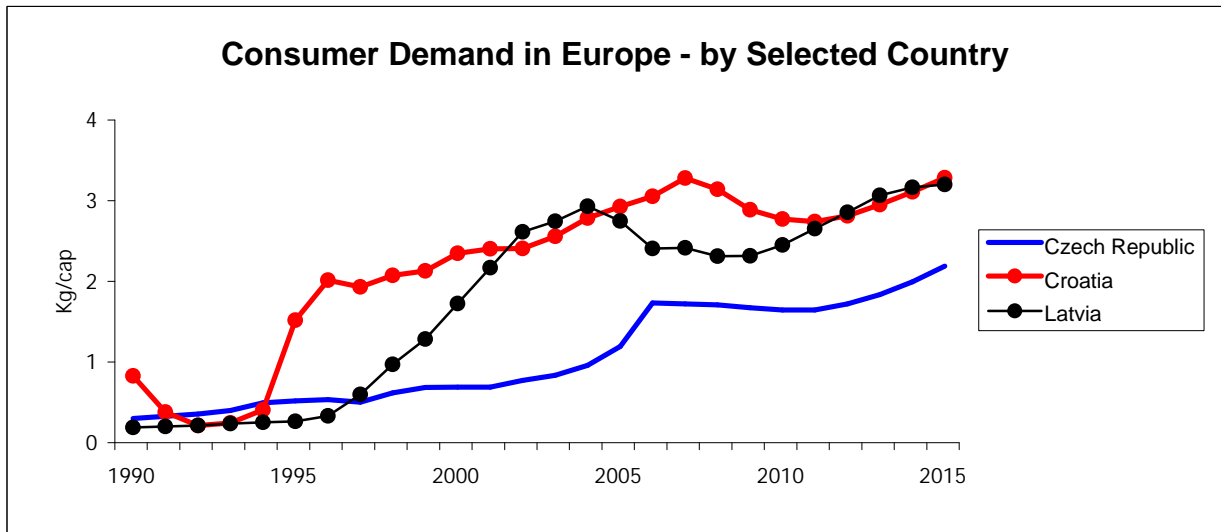
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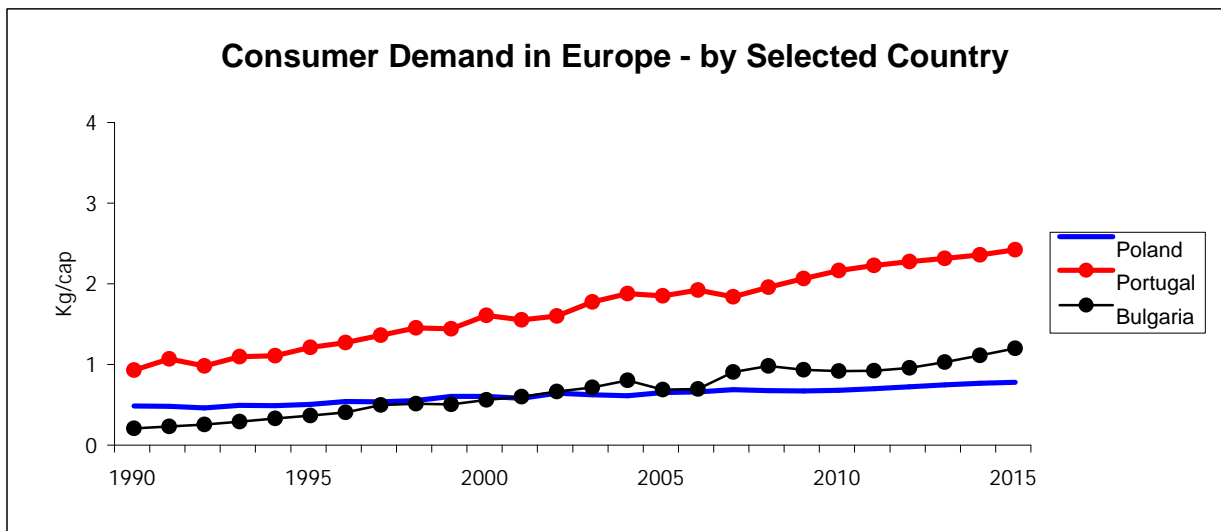
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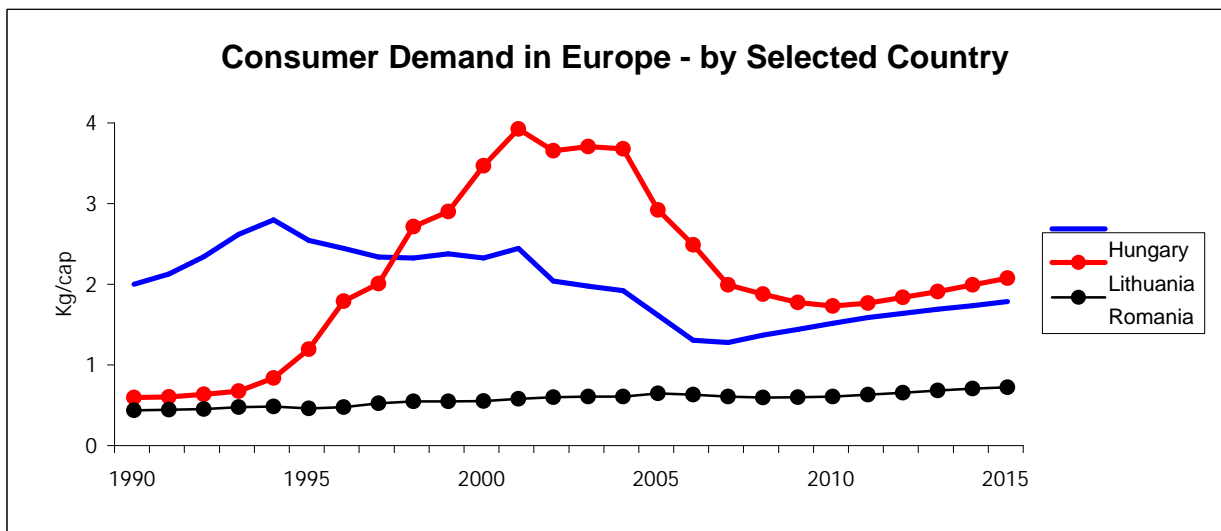
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Consumer Demand - by Country

Kg/cap	1990	2000	2005	2006	2007	2008	2009	2010	2011	2012	2015
Austria	*	*	*	*	2.02	2.18	2.20	*	*	*	*
Belgium	*	*	*	*	4.40	4.59	4.30	*	*	*	*
Bulgaria	*	*	*	*	0.77	0.84	0.80	*	*	*	*
Cyprus	*	*	*	*	1.53	1.71	1.50	*	*	*	*
Czech Republic	*	*	*	*	1.69	1.68	1.64	*	*	*	*
Denmark	*	*	*	*	4.62	3.88	3.99	*	*	*	*
Estonia	*	*	*	*	2.78	2.67	2.67	*	*	*	*
Finland	*	*	*	*	1.29	1.35	1.26	*	*	*	*
France	*	*	*	*	1.16	1.08	1.08	*	*	*	*
Germany	*	*	*	*	1.75	1.76	1.77	*	*	*	*
Greece	*	*	*	*	4.22	4.11	3.99	*	*	*	*
Hungary	*	*	*	*	1.04	1.13	1.20	*	*	*	*
Ireland	*	*	*	*	2.68	2.13	2.21	*	*	*	*
Italy	*	*	*	*	2.80	2.52	2.50	*	*	*	*
Latvia	*	*	*	*	2.38	2.28	2.28	*	*	*	*
Lithuania	*	*	*	*	1.75	1.64	1.54	*	*	*	*
Luxembourg	*	*	*	*	0.99	1.12	1.13	*	*	*	*
Malta	*	*	*	*	1.79	1.42	1.42	*	*	*	*
Netherlands	*	*	*	*	0.87	0.87	0.82	*	*	*	*
Poland	*	*	*	*	0.55	0.54	0.54	*	*	*	*
Portugal	*	*	*	*	1.70	1.82	1.93	*	*	*	*
Romania	*	*	*	*	0.37	0.36	0.36	*	*	*	*
Slovakia	*	*	*	*	1.03	1.02	1.06	*	*	*	*
Slovenia	*	*	*	*	1.06	1.17	1.05	*	*	*	*
Spain	*	*	*	*	2.68	2.67	2.69	*	*	*	*
Sweden	*	*	*	*	1.52	1.39	1.38	*	*	*	*
United Kingdom	*	*	*	*	1.95	1.99	2.02	*	*	*	*
Total EU	*	*	*	*	1.82	1.78	1.77	*	*	*	*
Croatia	*	*	*	*	3.25	3.11	2.85	*	*	*	*
Iceland	*	*	*	*	1.31	1.25	1.21	*	*	*	*
Norway	*	*	*	*	1.74	1.67	1.75	*	*	*	*
Switzerland	*	*	*	*	0.62	0.59	0.59	*	*	*	*
Other Europe	*	*	*	*	1.63	1.56	1.51	*	*	*	*
Total Europe	*	*	*	*	1.82	1.77	1.77	*	*	*	*

* Data removed in the free version only.

Consumer Demand - by Country

1000 tonnes	1990	2000	2005	2006	2007	2008	2009	2010	2011	2012	2015
Austria	*	*	*	*	17	18	18	*	*	*	*
Belgium	*	*	*	*	46	48	45	*	*	*	*
Bulgaria	*	*	*	*	6	6	6	*	*	*	*
Cyprus	*	*	*	*	1	1	1	*	*	*	*
Czech Republic	*	*	*	*	17	17	17	*	*	*	*
Denmark	*	*	*	*	25	21	22	*	*	*	*
Estonia	*	*	*	*	4	3	3	*	*	*	*
Finland	*	*	*	*	7	7	7	*	*	*	*
France	*	*	*	*	71	66	66	*	*	*	*
Germany	*	*	*	*	144	145	146	*	*	*	*
Greece	*	*	*	*	45	44	43	*	*	*	*
Hungary	*	*	*	*	10	11	12	*	*	*	*
Ireland	*	*	*	*	11	9	9	*	*	*	*
Italy	*	*	*	*	163	147	145	*	*	*	*
Latvia	*	*	*	*	5	5	5	*	*	*	*
Lithuania	*	*	*	*	6	6	5	*	*	*	*
Luxembourg	*	*	*	*	0	1	1	*	*	*	*
Malta	*	*	*	*	1	1	1	*	*	*	*
Netherlands	*	*	*	*	14	14	14	*	*	*	*
Poland	*	*	*	*	21	21	21	*	*	*	*
Portugal	*	*	*	*	18	19	21	*	*	*	*
Romania	*	*	*	*	8	8	8	*	*	*	*
Slovakia	*	*	*	*	6	6	6	*	*	*	*
Slovenia	*	*	*	*	2	2	2	*	*	*	*
Spain	*	*	*	*	108	108	109	*	*	*	*
Sweden	*	*	*	*	14	13	13	*	*	*	*
United Kingdom	*	*	*	*	118	121	123	*	*	*	*
Total EU	*	*	*	*	890	868	867	*	*	*	*
Croatia	*	*	*	*	15	14	13	*	*	*	*
Iceland	*	*	*	*	0	0	0	*	*	*	*
Norway	*	*	*	*	8	8	8	*	*	*	*
Switzerland	*	*	*	*	5	4	4	*	*	*	*
Other Europe	*	*	*	*	28	27	26	*	*	*	*
Total Europe	*	*	*	*	917	895	893	*	*	*	*

* Data removed in the free version only.

Market Supply - by Country

Kg/cap	1990	2000	2005	2006	2007	2008	2009	2010	2011	2012	2015
Austria	*	*	*	*	1.88	2.13	2.10	*	*	*	*
Belgium	*	*	*	*	4.70	5.03	4.40	*	*	*	*
Bulgaria	*	*	*	*	0.84	0.95	0.82	*	*	*	*
Cyprus	*	*	*	*	1.75	2.06	1.58	*	*	*	*
Czech Republic	*	*	*	*	2.10	1.96	1.77	*	*	*	*
Denmark	*	*	*	*	4.84	3.27	3.40	*	*	*	*
Estonia	*	*	*	*	2.67	2.32	2.20	*	*	*	*
Finland	*	*	*	*	1.38	1.44	1.22	*	*	*	*
France	*	*	*	*	1.13	0.96	0.95	*	*	*	*
Germany	*	*	*	*	1.75	1.74	1.74	*	*	*	*
Greece	*	*	*	*	4.45	4.23	3.97	*	*	*	*
Hungary	*	*	*	*	0.77	0.99	1.16	*	*	*	*
Ireland	*	*	*	*	3.11	1.91	1.95	*	*	*	*
Italy	*	*	*	*	3.05	2.46	2.38	*	*	*	*
Latvia	*	*	*	*	2.18	1.93	1.90	*	*	*	*
Lithuania	*	*	*	*	1.65	1.72	1.62	*	*	*	*
Luxembourg	*	*	*	*	0.89	1.11	1.10	*	*	*	*
Malta	*	*	*	*	2.15	1.35	1.31	*	*	*	*
Netherlands	*	*	*	*	1.02	1.00	0.88	*	*	*	*
Poland	*	*	*	*	0.57	0.53	0.51	*	*	*	*
Portugal	*	*	*	*	1.58	1.76	1.92	*	*	*	*
Romania	*	*	*	*	0.37	0.34	0.33	*	*	*	*
Slovakia	*	*	*	*	1.06	0.95	0.93	*	*	*	*
Slovenia	*	*	*	*	1.13	1.32	1.06	*	*	*	*
Spain	*	*	*	*	2.67	2.61	2.60	*	*	*	*
Sweden	*	*	*	*	1.58	1.31	1.30	*	*	*	*
United Kingdom	*	*	*	*	2.02	1.96	1.87	*	*	*	*
Total EU	*	*	*	*	1.88	1.75	1.70	*	*	*	*
Croatia	*	*	*	*	3.73	3.38	2.80	*	*	*	*
Iceland	*	*	*	*	1.42	1.27	1.18	*	*	*	*
Norway	*	*	*	*	1.79	1.61	1.71	*	*	*	*
Switzerland	*	*	*	*	0.65	0.58	0.56	*	*	*	*
Other Europe	*	*	*	*	1.79	1.61	1.47	*	*	*	*
Total Europe	*	*	*	*	1.88	1.75	1.69	*	*	*	*

* Data removed in the free version only.

Market Supply - by Country

1000 tonnes	1990	2000	2005	2006	2007	2008	2009	2010	2011	2012	2015
Austria	*	*	*	*	15	17	17	*	*	*	*
Belgium	*	*	*	*	49	52	46	*	*	*	*
Bulgaria	*	*	*	*	6	7	6	*	*	*	*
Cyprus	*	*	*	*	1	2	1	*	*	*	*
Czech Republic	*	*	*	*	22	20	18	*	*	*	*
Denmark	*	*	*	*	26	18	19	*	*	*	*
Estonia	*	*	*	*	4	3	3	*	*	*	*
Finland	*	*	*	*	7	8	6	*	*	*	*
France	*	*	*	*	69	59	58	*	*	*	*
Germany	*	*	*	*	144	143	143	*	*	*	*
Greece	*	*	*	*	48	45	43	*	*	*	*
Hungary	*	*	*	*	8	10	11	*	*	*	*
Ireland	*	*	*	*	13	8	8	*	*	*	*
Italy	*	*	*	*	177	143	138	*	*	*	*
Latvia	*	*	*	*	5	4	4	*	*	*	*
Lithuania	*	*	*	*	6	6	6	*	*	*	*
Luxembourg	*	*	*	*	0	1	1	*	*	*	*
Malta	*	*	*	*	1	1	1	*	*	*	*
Netherlands	*	*	*	*	17	17	15	*	*	*	*
Poland	*	*	*	*	22	20	20	*	*	*	*
Portugal	*	*	*	*	17	19	21	*	*	*	*
Romania	*	*	*	*	8	7	7	*	*	*	*
Slovakia	*	*	*	*	6	5	5	*	*	*	*
Slovenia	*	*	*	*	2	3	2	*	*	*	*
Spain	*	*	*	*	108	106	105	*	*	*	*
Sweden	*	*	*	*	14	12	12	*	*	*	*
United Kingdom	*	*	*	*	123	119	114	*	*	*	*
Total EU	*	*	*	*	919	854	830	*	*	*	*
Croatia	*	*	*	*	17	15	13	*	*	*	*
Iceland	*	*	*	*	0	0	0	*	*	*	*
Norway	*	*	*	*	8	7	8	*	*	*	*
Switzerland	*	*	*	*	5	4	4	*	*	*	*
Other Europe	*	*	*	*	30	27	25	*	*	*	*
Total Europe	*	*	*	*	949	882	856	*	*	*	*

* Data removed in the free version only.

Consumer Demand - ranked by Kg/cap in 2008

1000 tonnes	2007	2008	2009	2010
Belgium	*	4.59	*	*
Greece	*	4.11	*	*
Denmark	*	3.88	*	*
Croatia	*	3.11	*	*
Spain	*	2.67	*	*
Estonia	*	2.67	*	*
Italy	*	2.52	*	*
Latvia	*	2.28	*	*
Austria	*	2.18	*	*
Ireland	*	2.13	*	*
United Kingdom	*	1.99	*	*
Portugal	*	1.82	*	*
EU27 Average	*	1.78	*	*
Total Europe Average	*	1.77	*	*
Germany	*	1.76	*	*
Cyprus	*	1.71	*	*
Czech Republic	*	1.68	*	*
Norway	*	1.67	*	*
Lithuania	*	1.64	*	*
Other Europe Average	*	1.56	*	*
Malta	*	1.42	*	*
Sweden	*	1.39	*	*
Finland	*	1.35	*	*
Iceland	*	1.25	*	*
Slovenia	*	1.17	*	*
Hungary	*	1.13	*	*
Luxembourg	*	1.12	*	*
France	*	1.08	*	*
Slovakia	*	1.02	*	*
Netherlands	*	0.87	*	*
Bulgaria	*	0.84	*	*
Switzerland	*	0.59	*	*
Poland	*	0.54	*	*
Romania	*	0.36	*	*

* Data removed in the free version only.

Other Europe is Croatia, Iceland, Norway and Switzerland.

Total Europe excludes Albania, Bosnia & Herzegovina, Serbia & Montenegro and TFYR Macedonia.

Please see the appendix for relevant notes about the comparison of per capita data for European countries.

Total Europe - T-shirts Supply/Demand

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	1.82	1.77	1.77	*	*	*
1000 tonnes	*	*	*	*	917	895	893	*	*	*
Market Supply										
Kg/cap	*	*	*	*	1.88	1.75	1.69	*	*	*
1000 tonnes	*	*	*	*	949	882	856	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	405	379	304	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	5.6	2.7	2.6
1000 tonnes	6.2	2.8	2.6
Market Supply			
Kg/cap	5.7	1.9	2.8
1000 tonnes	6.3	2.0	2.9
Accumulated Stock			
1000 tonnes	11.1	-0.2	-4.7

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	5.4	-2.6	-0.3	*	*	*
1000 tonnes	*	*	*	*	5.6	-2.5	-0.2	*	*	*
Market Supply										
Kg/cap	*	*	*	*	8.6	-7.2	-3.1	*	*	*
1000 tonnes	*	*	*	*	8.7	-7.1	-3.0	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	18.6	-6.4	-19.7	*	*	*

Austria

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	2.02	2.18	2.20	*	*	*
1000 tonnes	*	*	*	*	16.6	17.9	18.1	*	*	*
Market Supply										
Kg/cap	*	*	*	*	1.88	2.13	2.10	*	*	*
1000 tonnes	*	*	*	*	15.4	17.5	17.2	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	6.6	5.7	4.1	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	6.6	2.0	3.2
1000 tonnes	7.2	2.2	3.2
Market Supply			
Kg/cap	8.0	0.7	3.4
1000 tonnes	8.6	0.8	3.4
Accumulated Stock			
1000 tonnes	2.4	-10.2	-12.8

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	-2.6	7.8	0.9	*	*	*
1000 tonnes	*	*	*	*	-2.5	7.9	1.0	*	*	*
Market Supply										
Kg/cap	*	*	*	*	-8.5	13.2	-1.3	*	*	*
1000 tonnes	*	*	*	*	-8.4	13.3	-1.3	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	-26.3	-13.3	-29.0	*	*	*

Belgium

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	4.40	4.59	4.30	*	*	*
1000 tonnes	*	*	*	*	45.8	47.8	44.8	*	*	*
Market Supply										
Kg/cap	*	*	*	*	4.70	5.03	4.40	*	*	*
1000 tonnes	*	*	*	*	48.9	52.3	45.8	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	8.5	17.6	19.6	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	14.0	4.5	1.5
1000 tonnes	14.4	4.7	1.6
Market Supply			
Kg/cap	14.8	3.4	1.8
1000 tonnes	15.1	3.5	1.9
Accumulated Stock			
1000 tonnes	47.4	-3.9	7.2

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	6.5	4.2	-6.3	*	*	*
1000 tonnes	*	*	*	*	6.6	4.4	-6.2	*	*	*
Market Supply										
Kg/cap	*	*	*	*	11.5	6.9	-12.5	*	*	*
1000 tonnes	*	*	*	*	11.7	7.0	-12.4	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	264.7	106.2	11.6	*	*	*

Bulgaria

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	0.77	0.84	0.80	*	*	*
1000 tonnes	*	*	*	*	5.6	6.1	5.7	*	*	*
Market Supply										
Kg/cap	*	*	*	*	0.84	0.95	0.82	*	*	*
1000 tonnes	*	*	*	*	6.1	6.9	5.9	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	1.1	2.6	2.9	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	19.2	6.3	6.7
1000 tonnes	17.7	5.3	5.9
Market Supply			
Kg/cap	15.8	6.0	8.8
1000 tonnes	14.4	5.1	7.9
Accumulated Stock			
1000 tonnes	-1.3	13.9	-4.3

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	37.9	9.6	-5.4	*	*	*
1000 tonnes	*	*	*	*	36.7	8.7	-6.2	*	*	*
Market Supply										
Kg/cap	*	*	*	*	84.5	13.1	-13.7	*	*	*
1000 tonnes	*	*	*	*	83.0	12.2	-14.4	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	1520.2	139.8	11.5	*	*	*

Cyprus

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	1.53	1.71	1.50	*	*	*
1000 tonnes	*	*	*	*	1.2	1.4	1.2	*	*	*
Market Supply										
Kg/cap	*	*	*	*	1.75	2.06	1.58	*	*	*
1000 tonnes	*	*	*	*	1.4	1.6	1.3	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	0.5	1.1	1.2	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	-3.6	4.5	4.0
1000 tonnes	-2.6	5.1	4.5
Market Supply			
Kg/cap	-3.8	4.4	3.7
1000 tonnes	-2.8	5.0	4.3
Accumulated Stock			
1000 tonnes	4.8	24.0	14.9

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	16.2	12.0	-12.3	*	*	*
1000 tonnes	*	*	*	*	16.8	12.6	-11.8	*	*	*
Market Supply										
Kg/cap	*	*	*	*	26.4	17.5	-23.3	*	*	*
1000 tonnes	*	*	*	*	27.1	18.1	-22.9	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	256.2	112.1	12.5	*	*	*

Excludes Turkish Occupied Cyprus.

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Czech Republic

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	1.69	1.68	1.64	*	*	*
1000 tonnes	*	*	*	*	17.2	17.1	16.7	*	*	*
Market Supply										
Kg/cap	*	*	*	*	2.10	1.96	1.77	*	*	*
1000 tonnes	*	*	*	*	21.5	20.1	18.1	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	22.7	28.6	31.2	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	9.5	9.4	6.4
1000 tonnes	9.5	9.4	6.3
Market Supply			
Kg/cap	9.0	9.2	4.9
1000 tonnes	9.0	9.1	4.8
Accumulated Stock			
1000 tonnes	15.9	30.3	17.8

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	-0.6	-0.6	-2.2	*	*	*
1000 tonnes	*	*	*	*	-0.7	-0.6	-2.3	*	*	*
Market Supply										
Kg/cap	*	*	*	*	-6.3	-6.6	-9.8	*	*	*
1000 tonnes	*	*	*	*	-6.4	-6.7	-9.9	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	59.8	25.7	9.2	*	*	*

Denmark

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	4.62	3.88	3.99	*	*	*
1000 tonnes	*	*	*	*	25.3	21.3	22.0	*	*	*
Market Supply										
Kg/cap	*	*	*	*	4.84	3.27	3.40	*	*	*
1000 tonnes	*	*	*	*	26.5	17.9	18.7	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	20.0	13.4	6.9	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	2.7	1.7	1.4
1000 tonnes	3.1	2.0	1.7
Market Supply			
Kg/cap	2.5	1.1	0.9
1000 tonnes	2.8	1.4	1.1
Accumulated Stock			
1000 tonnes	11.7	-7.2	-1.9

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	-5.2	-16.0	2.9	*	*	*
1000 tonnes	*	*	*	*	-4.9	-15.7	3.2	*	*	*
Market Supply										
Kg/cap	*	*	*	*	-11.0	-32.4	3.9	*	*	*
1000 tonnes	*	*	*	*	-10.7	-32.2	4.2	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	14.2	-33.1	-48.5	*	*	*

Estonia

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	2.78	2.67	2.67	*	*	*
1000 tonnes	*	*	*	*	3.7	3.5	3.5	*	*	*
Market Supply										
Kg/cap	*	*	*	*	2.67	2.32	2.20	*	*	*
1000 tonnes	*	*	*	*	3.5	3.0	2.9	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	7.3	6.3	5.0	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	8.1	0.8	3.5
1000 tonnes	6.7	0.1	2.8
Market Supply			
Kg/cap	7.1	-3.0	3.1
1000 tonnes	5.8	-3.7	2.4
Accumulated Stock			
1000 tonnes	4.3	6.2	-26.5

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	-1.1	-4.0	0.1	*	*	*
1000 tonnes	*	*	*	*	-1.7	-4.6	-0.6	*	*	*
Market Supply										
Kg/cap	*	*	*	*	-6.4	-13.0	-5.2	*	*	*
1000 tonnes	*	*	*	*	-7.0	-13.5	-5.8	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	-4.5	-13.1	-20.0	*	*	*

Finland

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	1.29	1.35	1.26	*	*	*
1000 tonnes	*	*	*	*	6.8	7.1	6.6	*	*	*
Market Supply										
Kg/cap	*	*	*	*	1.38	1.44	1.22	*	*	*
1000 tonnes	*	*	*	*	7.2	7.6	6.4	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	1.4	2.4	1.9	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	6.9	3.3	4.3
1000 tonnes	7.3	3.5	4.3
Market Supply			
Kg/cap	6.2	2.3	5.0
1000 tonnes	6.6	2.4	5.0
Accumulated Stock			
1000 tonnes	32.2	-1.7	33.2

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	6.8	4.4	-6.5	*	*	*
1000 tonnes	*	*	*	*	7.0	4.6	-6.4	*	*	*
Market Supply										
Kg/cap	*	*	*	*	9.5	4.9	-15.5	*	*	*
1000 tonnes	*	*	*	*	9.6	5.1	-15.4	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	153.7	68.7	-19.4	*	*	*

France

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	1.16	1.08	1.08	*	*	*
1000 tonnes	*	*	*	*	71.0	66.1	66.1	*	*	*
Market Supply										
Kg/cap	*	*	*	*	1.13	0.96	0.95	*	*	*
1000 tonnes	*	*	*	*	69.3	58.8	58.1	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	49.4	35.0	19.1	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	1.9	-0.9	0.9
1000 tonnes	2.4	-0.5	1.2
Market Supply			
Kg/cap	3.1	-2.4	1.2
1000 tonnes	3.6	-2.0	1.4
Accumulated Stock			
1000 tonnes	14.2	-17.3	-8.1

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	12.2	-7.2	-0.3	*	*	*
1000 tonnes	*	*	*	*	12.6	-6.9	0.0	*	*	*
Market Supply										
Kg/cap	*	*	*	*	27.7	-15.4	-1.4	*	*	*
1000 tonnes	*	*	*	*	28.1	-15.1	-1.1	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	-6.2	-29.3	-45.4	*	*	*

Germany

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	1.75	1.76	1.77	*	*	*
1000 tonnes	*	*	*	*	144.5	144.8	145.8	*	*	*
Market Supply										
Kg/cap	*	*	*	*	1.75	1.74	1.74	*	*	*
1000 tonnes	*	*	*	*	144.1	143.1	143.4	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	12.0	8.6	3.9	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	1.2	0.8	1.5
1000 tonnes	3.9	0.8	1.5
Market Supply			
Kg/cap	1.0	0.4	1.9
1000 tonnes	3.7	0.4	1.9
Accumulated Stock			
1000 tonnes	6.6	-32.2	10.7

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	-1.0	0.3	0.7	*	*	*
1000 tonnes	*	*	*	*	-1.0	0.2	0.7	*	*	*
Market Supply										
Kg/cap	*	*	*	*	-3.0	-0.7	0.3	*	*	*
1000 tonnes	*	*	*	*	-3.1	-0.7	0.2	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	-5.1	-28.0	-54.5	*	*	*

All historic data calculated on the basis of a unified Germany.

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Greece

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	4.22	4.11	3.99	*	*	*
1000 tonnes	*	*	*	*	45.2	44.1	42.8	*	*	*
Market Supply										
Kg/cap	*	*	*	*	4.45	4.23	3.97	*	*	*
1000 tonnes	*	*	*	*	47.6	45.3	42.6	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	6.2	8.6	8.2	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	1.3	-0.8	3.3
1000 tonnes	1.7	-0.6	3.4
Market Supply			
Kg/cap	2.3	-1.8	7.1
1000 tonnes	2.7	-1.7	7.2
Accumulated Stock			
1000 tonnes	25.7	-16.5	-2.2

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	24.6	-2.5	-3.0	*	*	*
1000 tonnes	*	*	*	*	24.8	-2.3	-2.9	*	*	*
Market Supply										
Kg/cap	*	*	*	*	59.1	-4.9	-6.1	*	*	*
1000 tonnes	*	*	*	*	59.4	-4.8	-6.0	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	401.9	40.3	-4.7	*	*	*

Hungary

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	1.04	1.13	1.20	*	*	*
1000 tonnes	*	*	*	*	10.3	11.2	11.9	*	*	*
Market Supply										
Kg/cap	*	*	*	*	0.77	0.99	1.16	*	*	*
1000 tonnes	*	*	*	*	7.7	9.9	11.5	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	3.8	1.1	0.3	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	1.7	-4.8	1.2
1000 tonnes	1.5	-5.0	0.9
Market Supply			
Kg/cap	3.2	-5.1	2.3
1000 tonnes	3.0	-5.3	2.0
Accumulated Stock			
1000 tonnes	0.0	-13.9	-2.9

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	-2.8	8.7	6.5	*	*	*
1000 tonnes	*	*	*	*	-3.1	8.4	6.2	*	*	*
Market Supply										
Kg/cap	*	*	*	*	1.3	28.6	16.7	*	*	*
1000 tonnes	*	*	*	*	1.1	28.2	16.4	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	-58.1	-70.4	-74.3	*	*	*

Ireland

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	2.68	2.13	2.21	*	*	*
1000 tonnes	*	*	*	*	11.0	8.9	9.3	*	*	*
Market Supply										
Kg/cap	*	*	*	*	3.11	1.91	1.95	*	*	*
1000 tonnes	*	*	*	*	12.8	7.9	8.2	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	5.5	3.8	1.7	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	12.8	5.1	4.4
1000 tonnes	13.7	6.3	5.6
Market Supply			
Kg/cap	10.8	4.3	4.4
1000 tonnes	11.7	5.5	5.5
Accumulated Stock			
1000 tonnes	-19.2	7.6	16.4

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	18.9	-20.4	3.5	*	*	*
1000 tonnes	*	*	*	*	20.3	-19.5	4.7	*	*	*
Market Supply										
Kg/cap	*	*	*	*	31.2	-38.6	2.0	*	*	*
1000 tonnes	*	*	*	*	32.7	-37.9	3.1	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	190.3	-31.8	-55.9	*	*	*

Italy

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	2.80	2.52	2.50	*	*	*
1000 tonnes	*	*	*	*	162.7	146.8	145.5	*	*	*
Market Supply										
Kg/cap	*	*	*	*	3.05	2.46	2.38	*	*	*
1000 tonnes	*	*	*	*	177.4	143.2	138.3	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	83.9	76.7	62.3	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	29.3	2.2	1.2
1000 tonnes	29.5	2.3	1.1
Market Supply			
Kg/cap	29.3	1.4	0.8
1000 tonnes	29.5	1.4	0.8
Accumulated Stock			
1000 tonnes	20.4	12.5	-11.8

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	17.7	-9.8	-0.8	*	*	*
1000 tonnes	*	*	*	*	17.8	-9.8	-0.9	*	*	*
Market Supply										
Kg/cap	*	*	*	*	35.8	-19.3	-3.3	*	*	*
1000 tonnes	*	*	*	*	35.8	-19.3	-3.4	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	53.9	-8.6	-18.7	*	*	*

Latvia

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	2.38	2.28	2.28	*	*	*
1000 tonnes	*	*	*	*	5.4	5.1	5.1	*	*	*
Market Supply										
Kg/cap	*	*	*	*	2.18	1.93	1.90	*	*	*
1000 tonnes	*	*	*	*	4.9	4.3	4.2	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	5.2	3.6	1.9	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	27.1	3.6	1.5
1000 tonnes	25.7	2.9	0.9
Market Supply			
Kg/cap	25.7	2.6	1.6
1000 tonnes	24.3	1.9	1.0
Accumulated Stock			
1000 tonnes	14.9	7.8	-6.7

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	0.3	-4.4	0.2	*	*	*
1000 tonnes	*	*	*	*	-0.4	-5.0	-0.4	*	*	*
Market Supply										
Kg/cap	*	*	*	*	-1.2	-11.4	-1.7	*	*	*
1000 tonnes	*	*	*	*	-1.9	-12.0	-2.3	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	-15.3	-30.3	-47.2	*	*	*

Lithuania

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	1.75	1.64	1.54	*	*	*
1000 tonnes	*	*	*	*	6.3	5.8	5.5	*	*	*
Market Supply										
Kg/cap	*	*	*	*	1.65	1.72	1.62	*	*	*
1000 tonnes	*	*	*	*	5.9	6.1	5.8	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	0.3	0.9	1.5	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	24.6	-7.4	-3.7
1000 tonnes	24.5	-7.7	-4.0
Market Supply			
Kg/cap	24.9	-7.3	-2.1
1000 tonnes	24.7	-7.6	-2.4
Accumulated Stock			
1000 tonnes	11.6	4.6	4.6

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	-22.1	-6.6	-6.2	*	*	*
1000 tonnes	*	*	*	*	-22.3	-6.8	-6.4	*	*	*
Market Supply										
Kg/cap	*	*	*	*	-23.0	4.2	-5.9	*	*	*
1000 tonnes	*	*	*	*	-23.2	3.9	-6.2	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	-72.0	210.1	66.6	*	*	*

Luxembourg

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	0.99	1.12	1.13	*	*	*
1000 tonnes	*	*	*	*	0.5	0.5	0.6	*	*	*
Market Supply										
Kg/cap	*	*	*	*	0.89	1.11	1.10	*	*	*
1000 tonnes	*	*	*	*	0.4	0.5	0.5	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	0.1	0.1	0.1	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	8.7	3.2	3.5
1000 tonnes	10.2	4.5	4.7
Market Supply			
Kg/cap	12.1	2.6	3.9
1000 tonnes	13.7	3.9	5.1
Accumulated Stock			
1000 tonnes	11.6	-17.0	-4.8

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	-4.3	12.8	1.4	*	*	*
1000 tonnes	*	*	*	*	-3.1	14.2	2.6	*	*	*
Market Supply										
Kg/cap	*	*	*	*	-12.5	24.4	-0.5	*	*	*
1000 tonnes	*	*	*	*	-11.4	25.9	0.7	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	-42.3	-7.9	-26.3	*	*	*

Malta

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	1.79	1.42	1.42	*	*	*
1000 tonnes	*	*	*	*	0.720	0.571	0.574	*	*	*
Market Supply										
Kg/cap	*	*	*	*	2.15	1.35	1.31	*	*	*
1000 tonnes	*	*	*	*	0.863	0.543	0.531	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	0.310	0.255	0.169	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	11.0	14.0	5.2
1000 tonnes	11.9	14.5	5.6
Market Supply			
Kg/cap	10.8	13.8	6.3
1000 tonnes	11.7	14.3	6.7
Accumulated Stock			
1000 tonnes	3.4	10.9	36.2

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	32.3	-21.0	0.2	*	*	*
1000 tonnes	*	*	*	*	32.8	-20.6	0.6	*	*	*
Market Supply										
Kg/cap	*	*	*	*	56.3	-37.3	-2.6	*	*	*
1000 tonnes	*	*	*	*	57.0	-37.1	-2.2	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	1180.4	-17.7	-33.7	*	*	*

Netherlands

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	0.87	0.87	0.82	*	*	*
1000 tonnes	*	*	*	*	14.5	14.5	13.7	*	*	*
Market Supply										
Kg/cap	*	*	*	*	1.02	1.00	0.88	*	*	*
1000 tonnes	*	*	*	*	16.9	16.6	14.7	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	8.1	12.3	14.4	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	0.6	4.7	2.1
1000 tonnes	1.2	5.3	2.5
Market Supply			
Kg/cap	-2.8	7.1	1.7
1000 tonnes	-2.2	7.7	2.1
Accumulated Stock			
1000 tonnes	41.9	1.9	18.2

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	14.7	-0.4	-5.5	*	*	*
1000 tonnes	*	*	*	*	15.3	0.1	-5.1	*	*	*
Market Supply										
Kg/cap	*	*	*	*	25.1	-2.5	-11.6	*	*	*
1000 tonnes	*	*	*	*	25.7	-2.1	-11.2	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	158.2	52.6	16.5	*	*	*

Poland

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	0.55	0.54	0.54	*	*	*
1000 tonnes	*	*	*	*	21.3	20.7	20.6	*	*	*
Market Supply										
Kg/cap	*	*	*	*	0.57	0.53	0.51	*	*	*
1000 tonnes	*	*	*	*	22.0	20.4	19.7	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	7.1	6.4	4.6	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	2.9	1.5	2.2
1000 tonnes	3.1	1.5	2.1
Market Supply			
Kg/cap	2.6	0.5	2.2
1000 tonnes	2.7	0.5	2.1
Accumulated Stock			
1000 tonnes	3.5	-6.3	-12.9

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	5.5	-2.6	-0.4	*	*	*
1000 tonnes	*	*	*	*	5.5	-2.7	-0.4	*	*	*
Market Supply										
Kg/cap	*	*	*	*	8.6	-7.3	-3.2	*	*	*
1000 tonnes	*	*	*	*	8.5	-7.3	-3.2	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	24.4	-9.8	-28.6	*	*	*

Portugal

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	1.70	1.82	1.93	*	*	*
1000 tonnes	*	*	*	*	18.1	19.5	20.7	*	*	*
Market Supply										
Kg/cap	*	*	*	*	1.58	1.76	1.92	*	*	*
1000 tonnes	*	*	*	*	16.9	18.8	20.5	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	1.7	0.4	0.1	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	6.4	3.3	2.9
1000 tonnes	6.8	3.6	3.2
Market Supply			
Kg/cap	6.9	2.9	2.7
1000 tonnes	7.3	3.3	3.0
Accumulated Stock			
1000 tonnes	1.1	-11.9	-23.9

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	-4.6	7.0	5.9	*	*	*
1000 tonnes	*	*	*	*	-4.2	7.4	6.2	*	*	*
Market Supply										
Kg/cap	*	*	*	*	-12.4	11.3	8.7	*	*	*
1000 tonnes	*	*	*	*	-12.1	11.6	9.0	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	-59.5	-75.1	-72.9	*	*	*

Romania

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	0.37	0.36	0.36	*	*	*
1000 tonnes	*	*	*	*	8.2	7.9	8.0	*	*	*
Market Supply										
Kg/cap	*	*	*	*	0.37	0.34	0.33	*	*	*
1000 tonnes	*	*	*	*	8.3	7.5	7.3	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	5.7	4.8	3.4	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	4.7	1.7	1.8
1000 tonnes	4.5	1.6	1.6
Market Supply			
Kg/cap	3.9	1.2	0.9
1000 tonnes	3.7	1.1	0.7
Accumulated Stock			
1000 tonnes	-24.6	27.4	-10.5

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	-5.6	-3.4	0.9	*	*	*
1000 tonnes	*	*	*	*	-5.7	-3.5	0.8	*	*	*
Market Supply										
Kg/cap	*	*	*	*	-12.0	-9.4	-2.0	*	*	*
1000 tonnes	*	*	*	*	-12.1	-9.6	-2.2	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	1.7	-16.1	-28.6	*	*	*

Slovakia

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	1.03	1.02	1.06	*	*	*
1000 tonnes	*	*	*	*	5.6	5.6	5.8	*	*	*
Market Supply										
Kg/cap	*	*	*	*	1.06	0.95	0.93	*	*	*
1000 tonnes	*	*	*	*	5.8	5.2	5.1	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	6.9	6.2	4.8	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	8.4	11.8	6.7
1000 tonnes	8.7	12.0	6.8
Market Supply			
Kg/cap	7.1	10.6	5.8
1000 tonnes	7.4	10.8	5.9
Accumulated Stock			
1000 tonnes	13.5	35.9	-10.5

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	-2.1	-0.8	3.3	*	*	*
1000 tonnes	*	*	*	*	-2.0	-0.7	3.5	*	*	*
Market Supply										
Kg/cap	*	*	*	*	-11.3	-10.1	-2.4	*	*	*
1000 tonnes	*	*	*	*	-11.1	-10.0	-2.2	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	5.1	-10.7	-22.0	*	*	*

Slovenia

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	1.06	1.17	1.05	*	*	*
1000 tonnes	*	*	*	*	2.1	2.3	2.1	*	*	*
Market Supply										
Kg/cap	*	*	*	*	1.13	1.32	1.06	*	*	*
1000 tonnes	*	*	*	*	2.3	2.6	2.1	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	0.5	1.1	1.1	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	18.4	3.7	3.7
1000 tonnes	18.5	3.7	3.6
Market Supply			
Kg/cap	17.1	4.3	5.3
1000 tonnes	17.2	4.3	5.2
Accumulated Stock			
1000 tonnes	16.5	16.0	2.7

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	*	*	*	*	*	*
1000 tonnes	*	*	*	*	*	*	*	*	*	*
Market Supply										
Kg/cap	*	*	*	*	*	*	*	*	*	*
1000 tonnes	*	*	*	*	*	*	*	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	*	*	*	*	*	*

Spain

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	2.68	2.67	2.69	*	*	*
1000 tonnes	*	*	*	*	108.3	108.0	108.8	*	*	*
Market Supply										
Kg/cap	*	*	*	*	2.67	2.61	2.60	*	*	*
1000 tonnes	*	*	*	*	107.9	105.5	105.4	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	25.2	20.2	13.4	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	0.9	6.4	2.1
1000 tonnes	1.1	6.5	2.1
Market Supply			
Kg/cap	1.3	5.5	2.7
1000 tonnes	1.5	5.7	2.7
Accumulated Stock			
1000 tonnes	8.9	-4.3	3.3

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	-0.2	-0.4	0.6	*	*	*
1000 tonnes	*	*	*	*	-0.1	-0.3	0.7	*	*	*
Market Supply										
Kg/cap	*	*	*	*	-1.9	-2.3	-0.2	*	*	*
1000 tonnes	*	*	*	*	-1.8	-2.2	-0.1	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	-3.4	-19.8	-34.0	*	*	*

Sweden

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	1.52	1.39	1.38	*	*	*
1000 tonnes	*	*	*	*	13.7	12.5	12.5	*	*	*
Market Supply										
Kg/cap	*	*	*	*	1.58	1.31	1.30	*	*	*
1000 tonnes	*	*	*	*	14.3	11.9	11.8	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	3.8	2.5	1.0	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	6.3	1.4	2.5
1000 tonnes	6.7	1.6	2.7
Market Supply			
Kg/cap	6.7	0.6	3.2
1000 tonnes	7.1	0.8	3.4
Accumulated Stock			
1000 tonnes	24.0	-16.7	0.3

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	5.2	-8.8	-0.3	*	*	*
1000 tonnes	*	*	*	*	5.3	-8.6	-0.1	*	*	*
Market Supply										
Kg/cap	*	*	*	*	10.3	-17.0	-1.0	*	*	*
1000 tonnes	*	*	*	*	10.4	-16.8	-0.9	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	41.9	-35.1	-60.9	*	*	*

United Kingdom

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	1.95	1.99	2.02	*	*	*
1000 tonnes	*	*	*	*	118	121	123	*	*	*
Market Supply										
Kg/cap	*	*	*	*	2.02	1.96	1.87	*	*	*
1000 tonnes	*	*	*	*	123	119	114	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	96.5	92.7	74.5	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	9.1	8.5	6.8
1000 tonnes	9.5	8.8	7.1
Market Supply			
Kg/cap	7.8	8.1	6.6
1000 tonnes	8.2	8.4	6.9
Accumulated Stock			
1000 tonnes	-0.6	24.5	-10.1

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	1.0	2.1	1.6	*	*	*
1000 tonnes	*	*	*	*	1.3	2.4	1.9	*	*	*
Market Supply										
Kg/cap	*	*	*	*	-5.2	-3.4	-4.4	*	*	*
1000 tonnes	*	*	*	*	-4.9	-3.1	-4.1	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	10.9	-3.9	-19.6	*	*	*

Total European Union (EU27)

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	1.82	1.78	1.77	*	*	*
1000 tonnes	*	*	*	*	890	868	867	*	*	*
Market Supply										
Kg/cap	*	*	*	*	1.88	1.75	1.70	*	*	*
1000 tonnes	*	*	*	*	919	854	830	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	390	363	289	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	5.5	2.7	2.6
1000 tonnes	6.1	2.8	2.7
Market Supply			
Kg/cap	5.6	1.8	2.8
1000 tonnes	6.3	2.0	2.9
Accumulated Stock			
1000 tonnes	11.7	-0.7	-4.7

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	5.4	-2.5	-0.2	*	*	*
1000 tonnes	*	*	*	*	5.5	-2.4	-0.1	*	*	*
Market Supply										
Kg/cap	*	*	*	*	8.6	-7.1	-2.9	*	*	*
1000 tonnes	*	*	*	*	8.7	-7.0	-2.8	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	17.5	-7.0	-20.3	*	*	*

Croatia

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	3.25	3.11	2.85	*	*	*
1000 tonnes	*	*	*	*	14.6	14.0	12.8	*	*	*
Market Supply										
Kg/cap	*	*	*	*	3.73	3.38	2.80	*	*	*
1000 tonnes	*	*	*	*	16.7	15.2	12.6	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	11.8	14.2	13.7	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	11.3	1.7	1.2
1000 tonnes	11.1	1.9	1.1
Market Supply			
Kg/cap	9.0	0.7	0.1
1000 tonnes	8.8	0.8	0.0
Accumulated Stock			
1000 tonnes	-19.2	38.5	-14.6

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	7.5	-4.4	-8.2	*	*	*
1000 tonnes	*	*	*	*	7.5	-4.4	-8.2	*	*	*
Market Supply										
Kg/cap	*	*	*	*	11.6	-9.4	-17.1	*	*	*
1000 tonnes	*	*	*	*	11.5	-9.5	-17.1	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	58.0	20.6	-3.4	*	*	*

Iceland

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	1.31	1.25	1.21	*	*	*
1000 tonnes	*	*	*	*	0.4	0.4	0.4	*	*	*
Market Supply										
Kg/cap	*	*	*	*	1.42	1.27	1.18	*	*	*
1000 tonnes	*	*	*	*	0.4	0.4	0.4	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	0.3	0.3	0.3	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	2.2	2.2	0.5
1000 tonnes	3.2	3.2	1.2
Market Supply			
Kg/cap	1.8	2.4	-0.8
1000 tonnes	2.8	3.4	-0.1
Accumulated Stock			
1000 tonnes	4.9	10.7	-26.0

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	3.1	-4.6	-2.7	*	*	*
1000 tonnes	*	*	*	*	4.0	-3.9	-2.0	*	*	*
Market Supply										
Kg/cap	*	*	*	*	4.1	-10.2	-7.2	*	*	*
1000 tonnes	*	*	*	*	5.0	-9.5	-6.4	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	31.1	5.9	-6.2	*	*	*

Norway

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	1.74	1.67	1.75	*	*	*
1000 tonnes	*	*	*	*	8.0	7.8	8.1	*	*	*
Market Supply										
Kg/cap	*	*	*	*	1.79	1.61	1.71	*	*	*
1000 tonnes	*	*	*	*	8.3	7.5	8.0	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	0.9	0.4	0.1	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	5.3	3.0	2.6
1000 tonnes	5.9	3.4	2.9
Market Supply			
Kg/cap	6.3	2.9	2.4
1000 tonnes	6.9	3.3	2.8
Accumulated Stock			
1000 tonnes	14.3	-24.9	21.5

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	4.2	-3.7	4.3	*	*	*
1000 tonnes	*	*	*	*	4.6	-3.3	4.6	*	*	*
Market Supply										
Kg/cap	*	*	*	*	5.5	-9.8	5.9	*	*	*
1000 tonnes	*	*	*	*	5.9	-9.5	6.3	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	110.2	-58.2	-83.4	*	*	*

Switzerland

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	0.62	0.59	0.59	*	*	*
1000 tonnes	*	*	*	*	4.7	4.5	4.5	*	*	*
Market Supply										
Kg/cap	*	*	*	*	0.65	0.58	0.56	*	*	*
1000 tonnes	*	*	*	*	4.9	4.4	4.3	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	1.4	1.3	0.9	*	*	*

* Data removed in the free version only.

Growth Rates

% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	13.0	6.5	1.8
1000 tonnes	13.7	7.0	2.1
Market Supply			
Kg/cap	12.8	5.9	1.9
1000 tonnes	13.5	6.4	2.2
Accumulated Stock			
1000 tonnes	-1.7	2.6	-2.0

% Change on Previous Year

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	2.7	-4.3	-1.1	*	*	*
1000 tonnes	*	*	*	*	3.1	-4.0	-0.8	*	*	*
Market Supply										
Kg/cap	*	*	*	*	3.6	-9.8	-3.9	*	*	*
1000 tonnes	*	*	*	*	4.1	-9.5	-3.6	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	40.5	-10.5	-31.8	*	*	*

Total Other Europe

	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	1.63	1.56	1.51	*	*	*
1000 tonnes	*	*	*	*	27.7	26.6	25.8	*	*	*
Market Supply										
Kg/cap	*	*	*	*	1.79	1.61	1.47	*	*	*
1000 tonnes	*	*	*	*	30.3	27.5	25.2	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	14.4	16.1	14.9	*	*	*

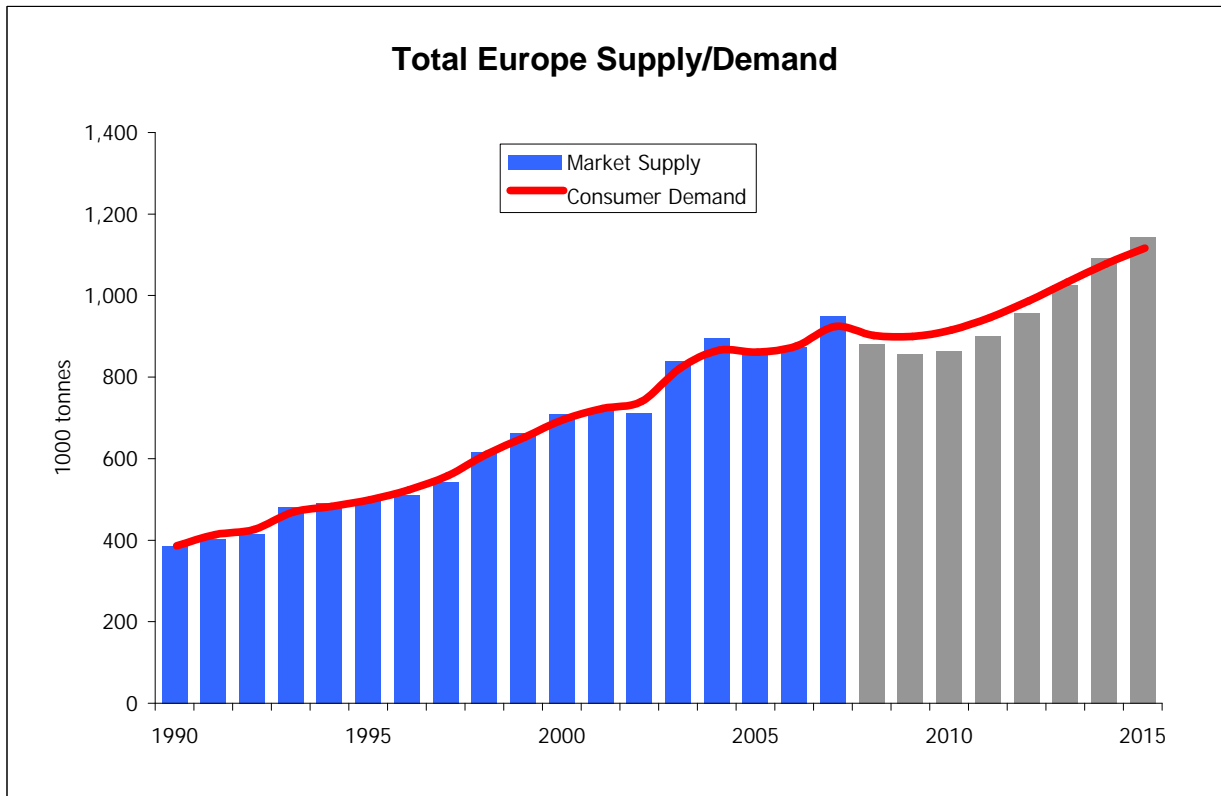
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Growth Rates

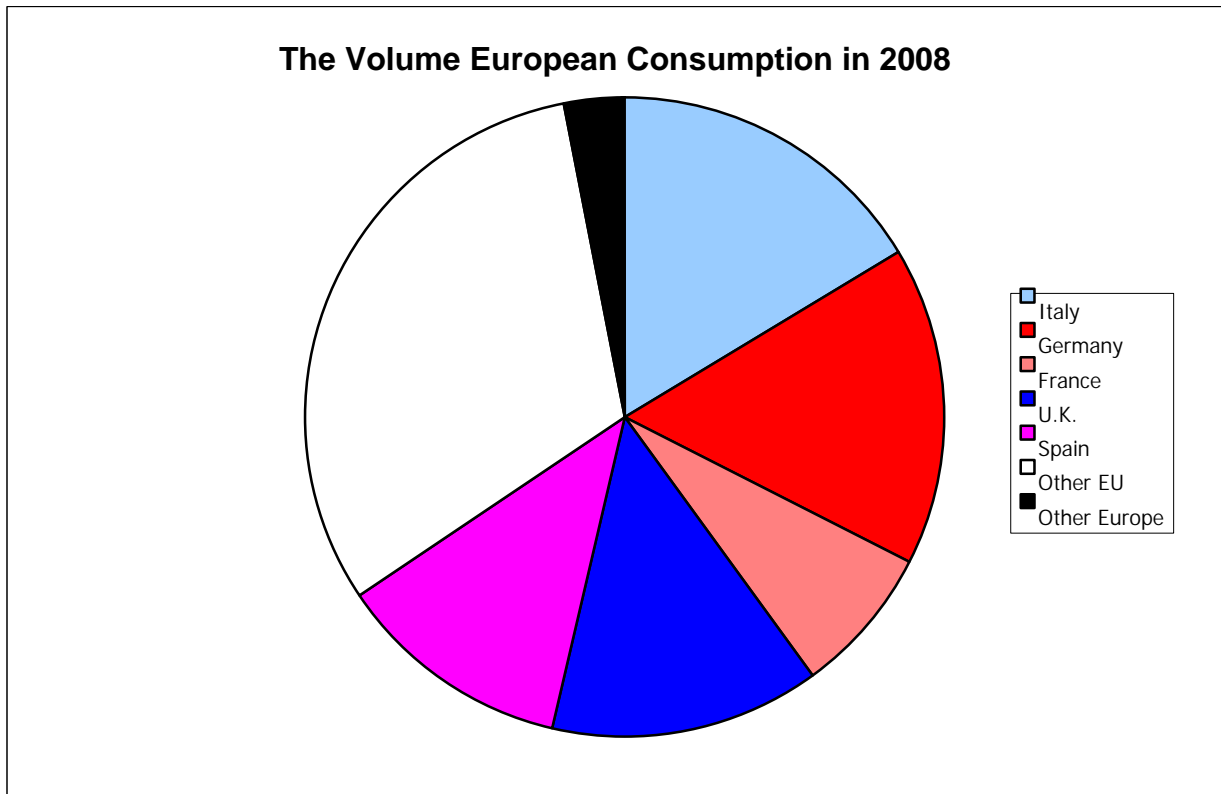
% per annum	1990-2000	2000-2010	2005-2015
Consumer Demand			
Kg/cap	8.8	2.8	1.6
1000 tonnes	9.2	3.1	1.8
Market Supply			
Kg/cap	8.1	2.1	1.0
1000 tonnes	8.5	2.5	1.2
Accumulated Stock			
1000 tonnes	-4.6	15.2	-7.1

% Change on Previous Year

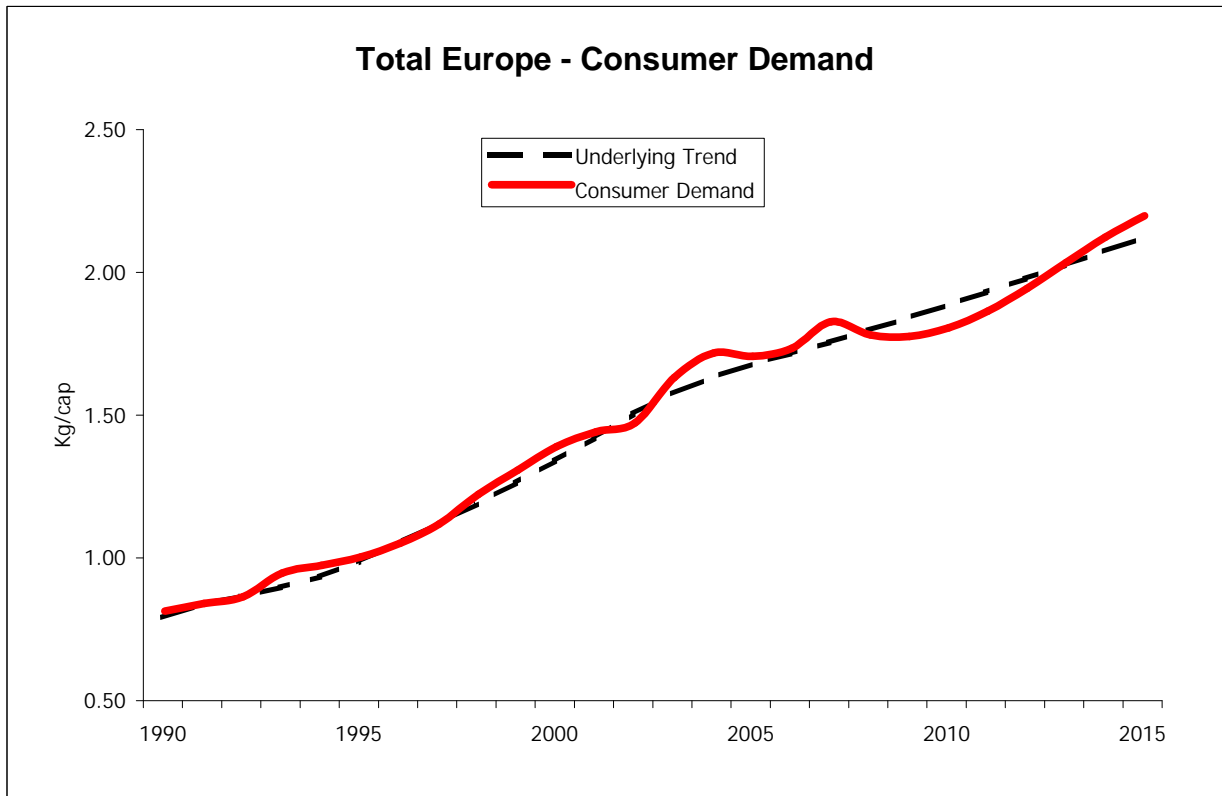
	1990	2000	2005	2006	2007	2008	2009	2010	2012	2015
Consumer Demand										
Kg/cap	*	*	*	*	5.5	-4.2	-3.3	*	*	*
1000 tonnes	*	*	*	*	5.8	-4.0	-3.1	*	*	*
Market Supply										
Kg/cap	*	*	*	*	8.3	-9.7	-8.6	*	*	*
1000 tonnes	*	*	*	*	8.6	-9.5	-8.4	*	*	*
Accumulated Stock										
1000 tonnes	*	*	*	*	58.0	12.1	-7.6	*	*	*



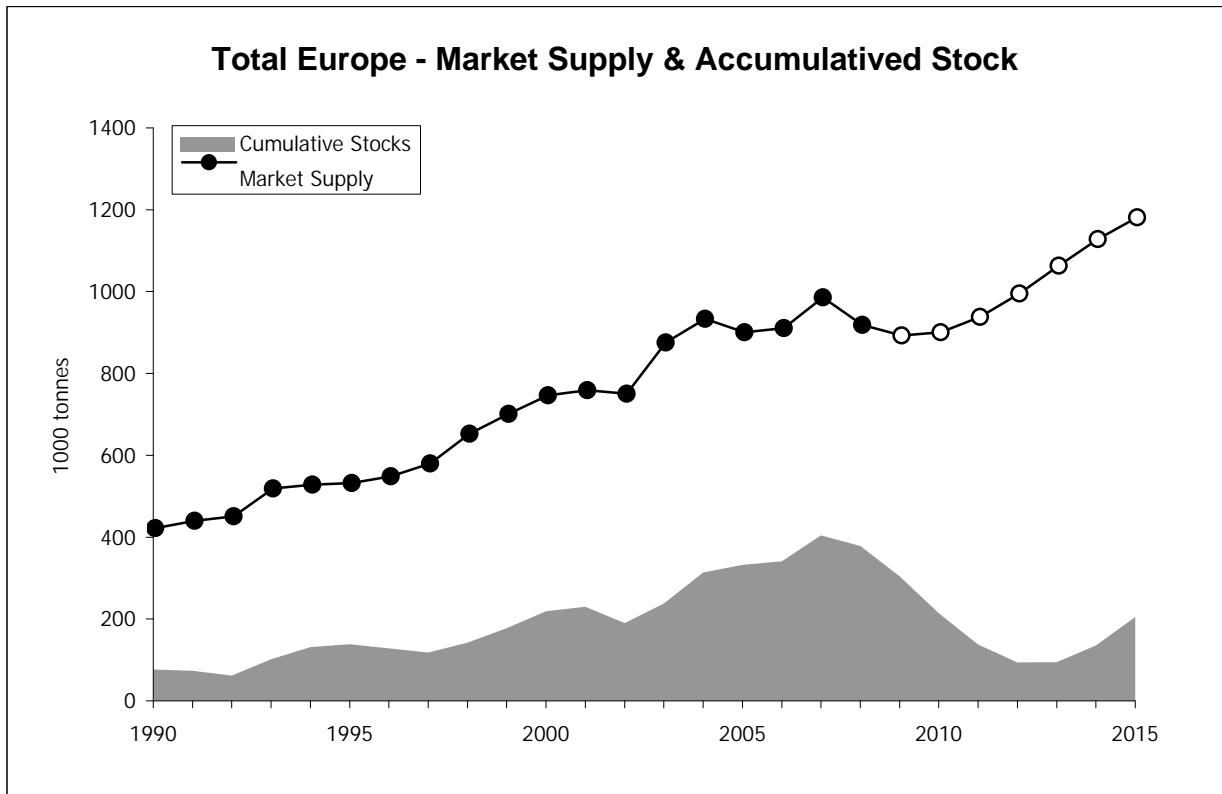
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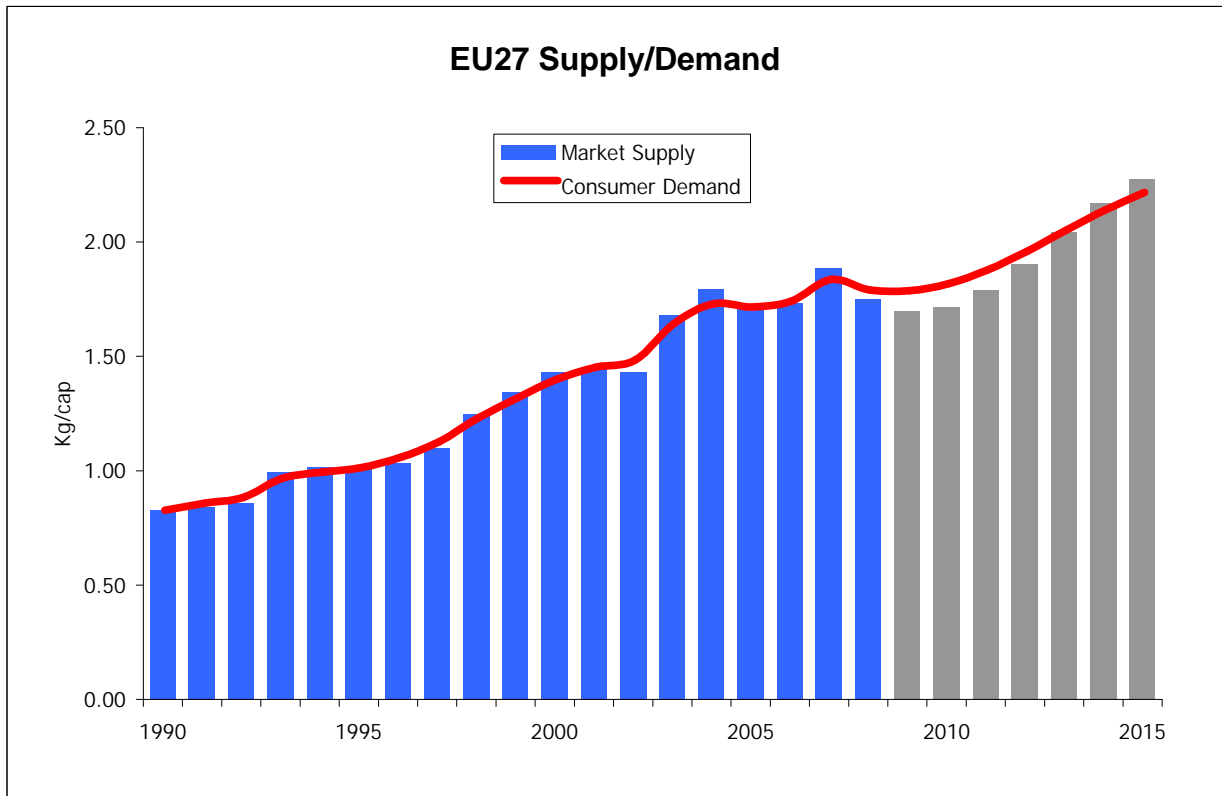
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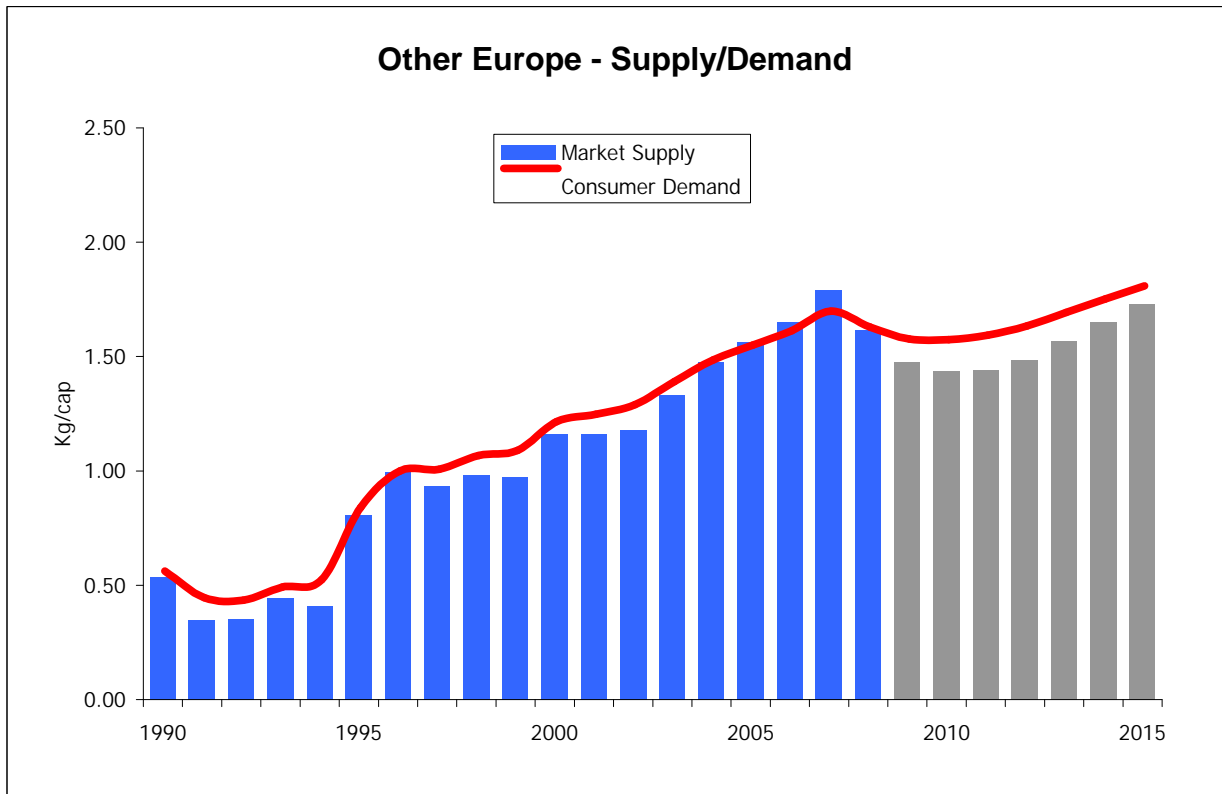
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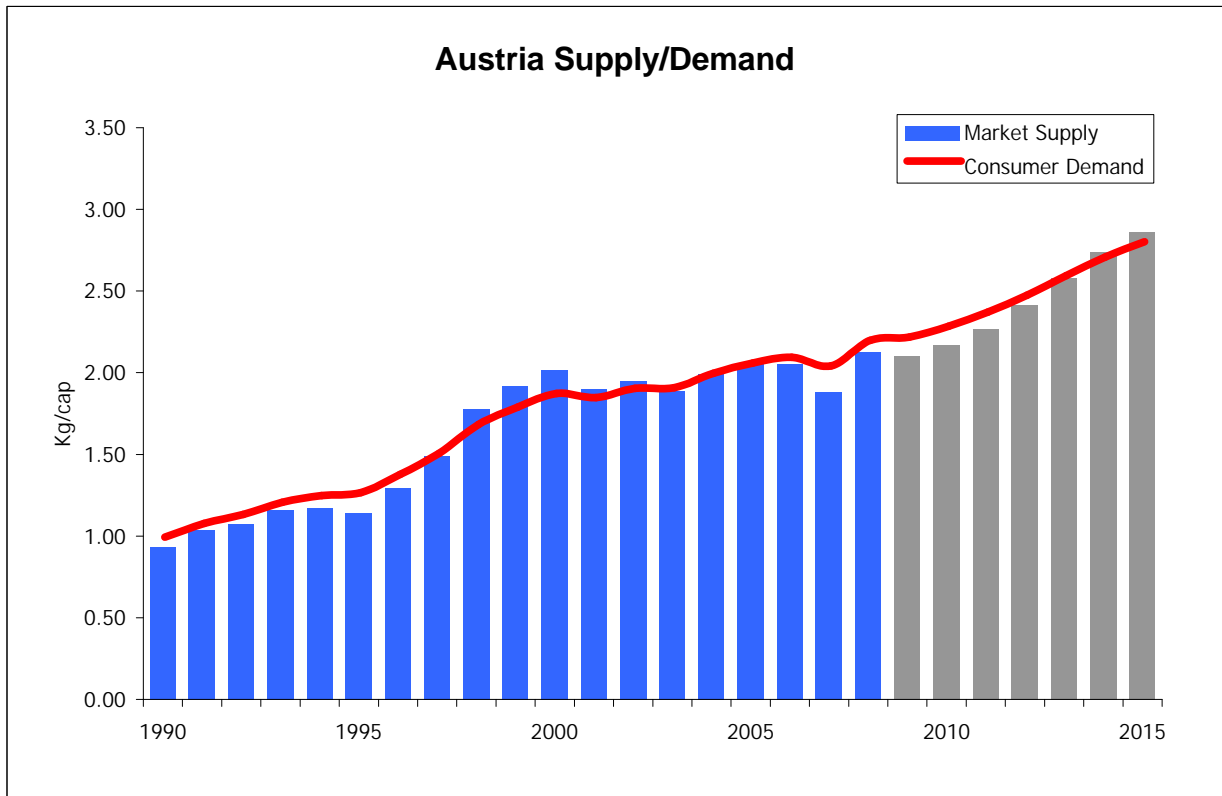
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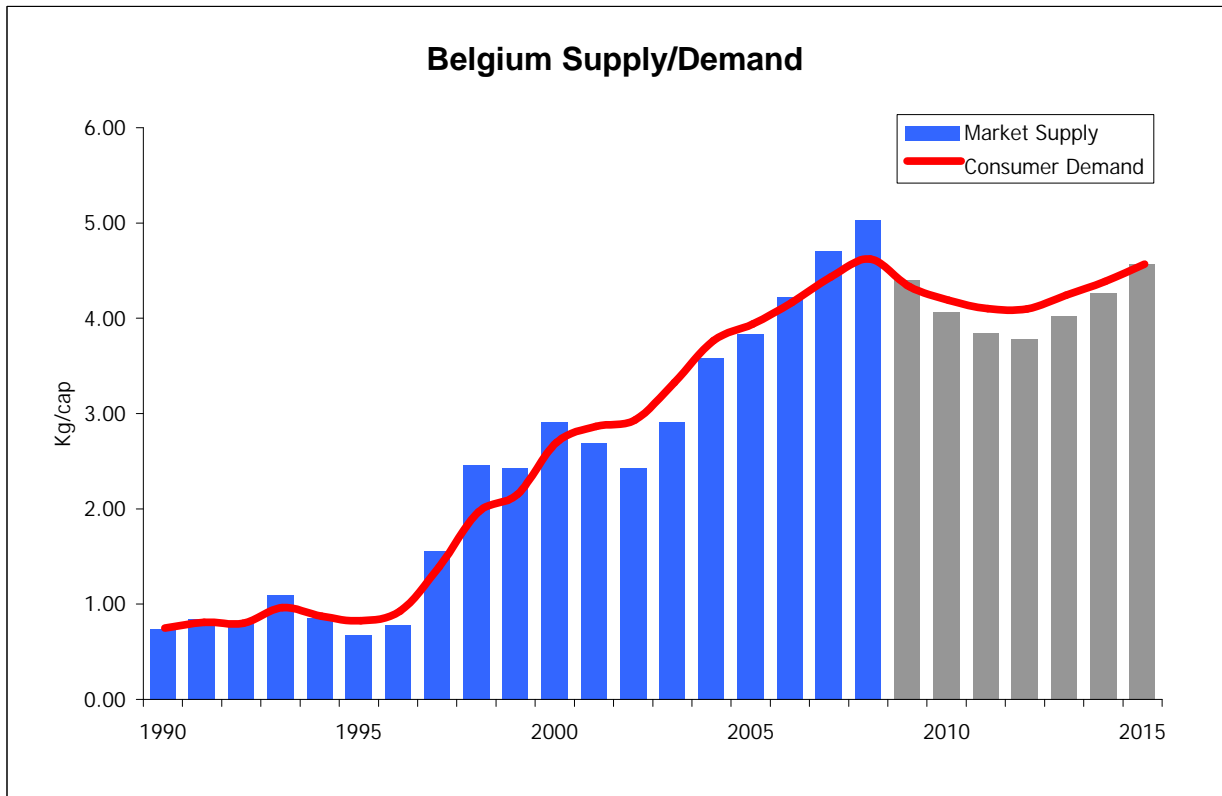
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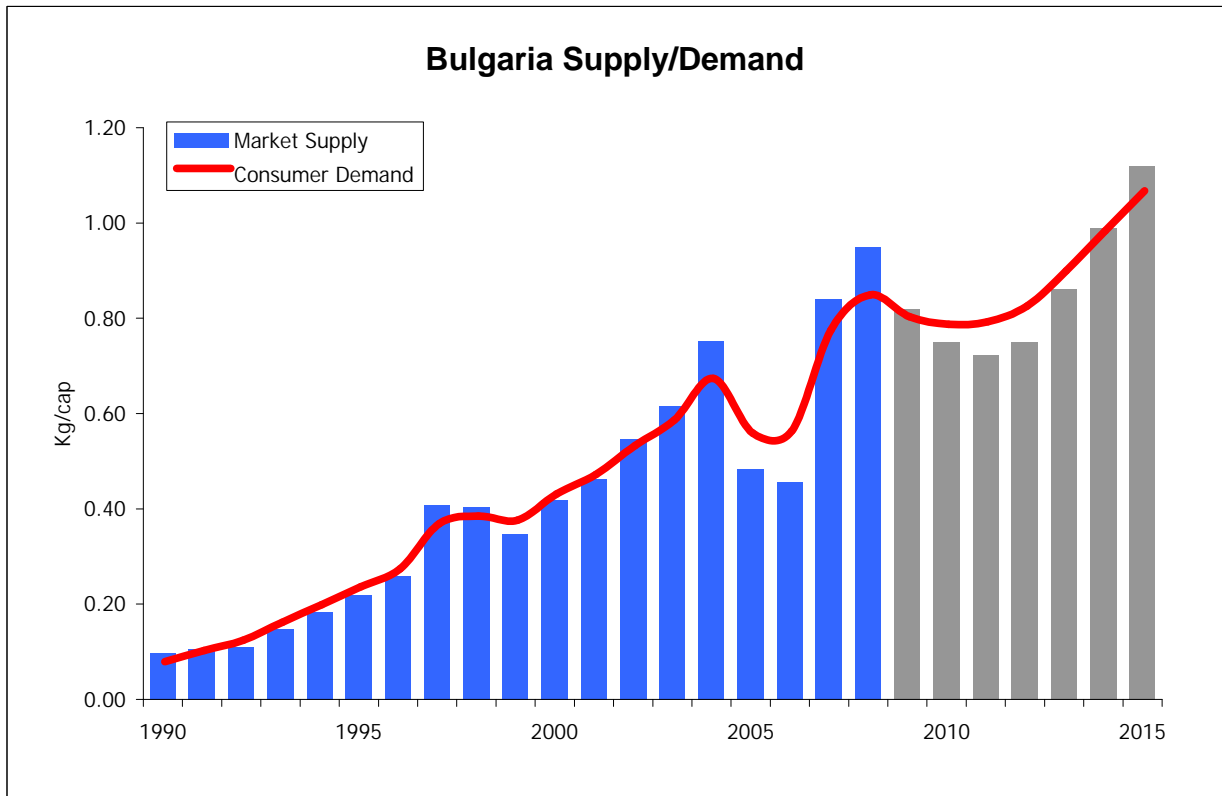
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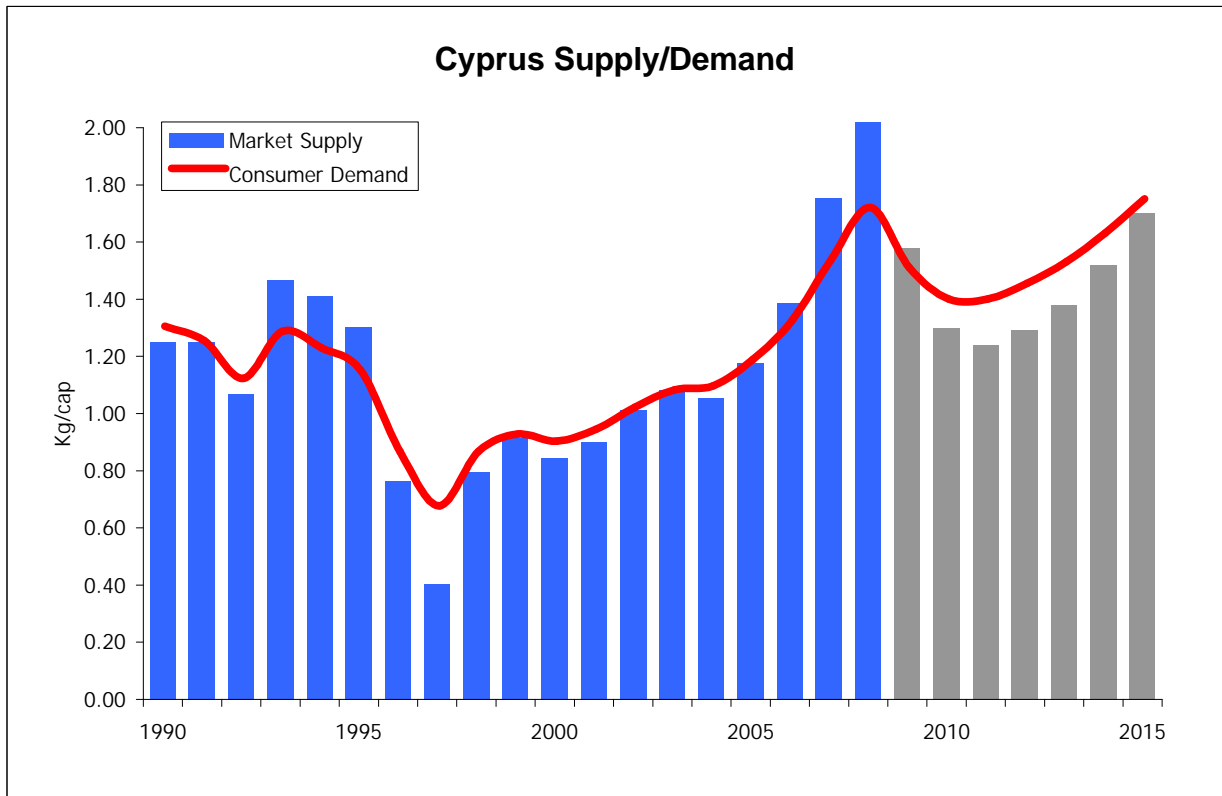
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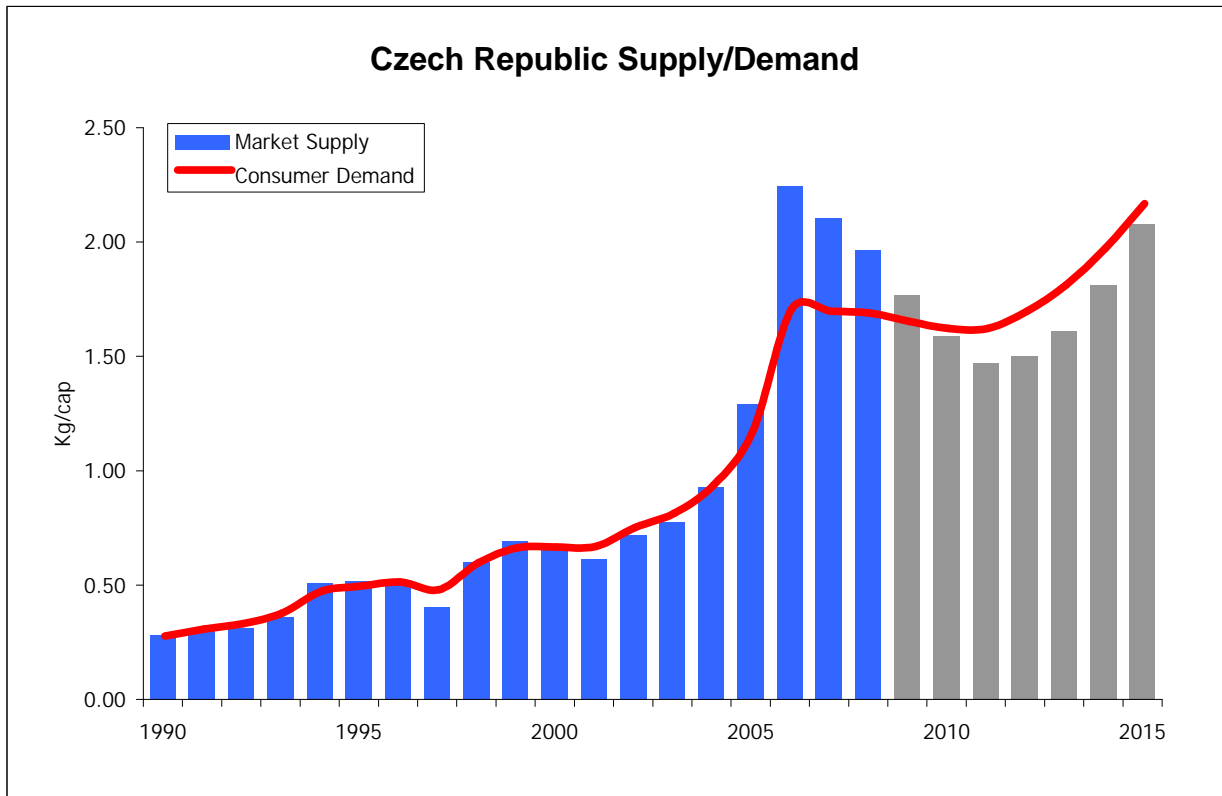
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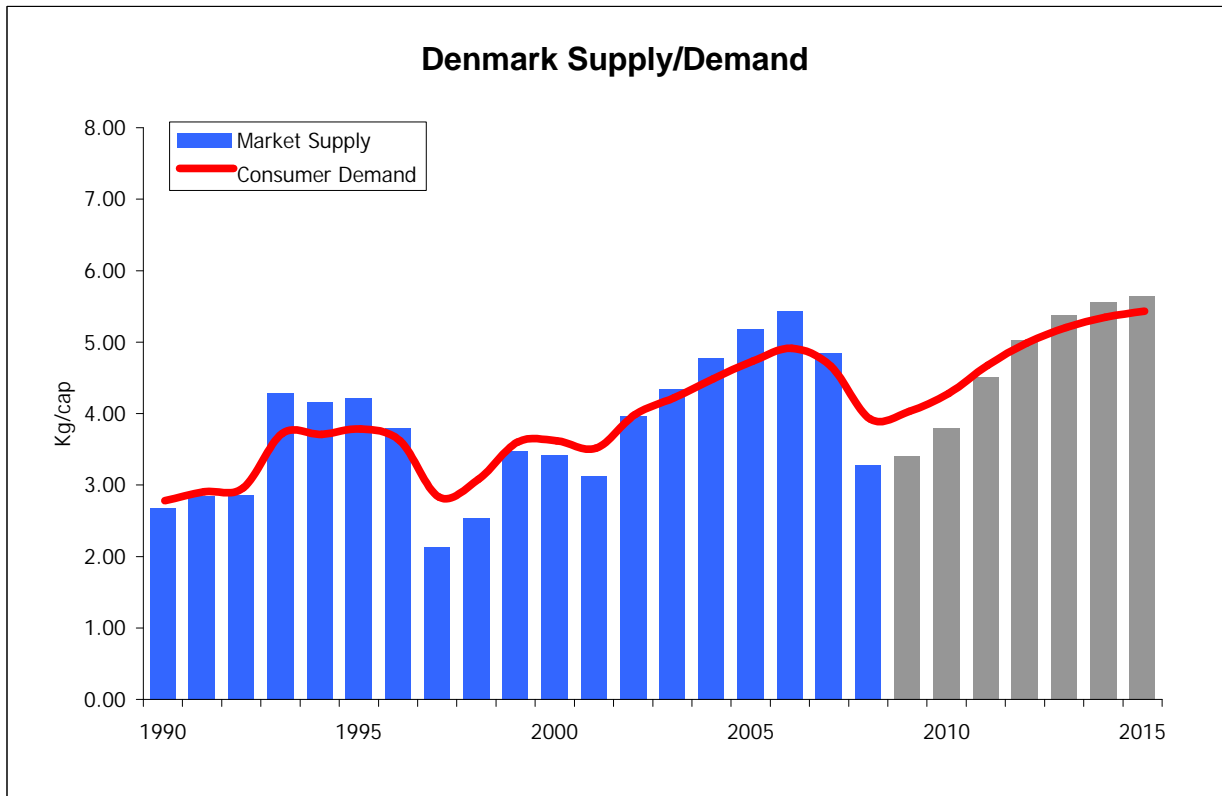
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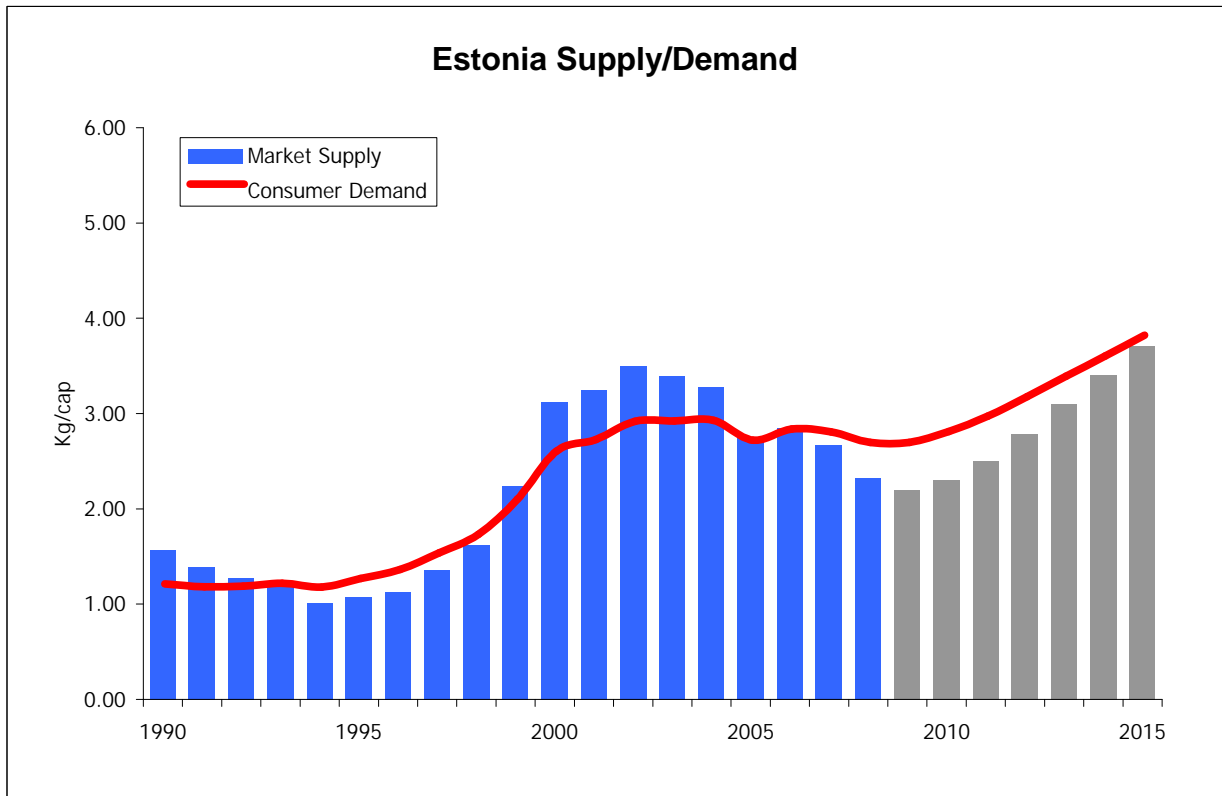
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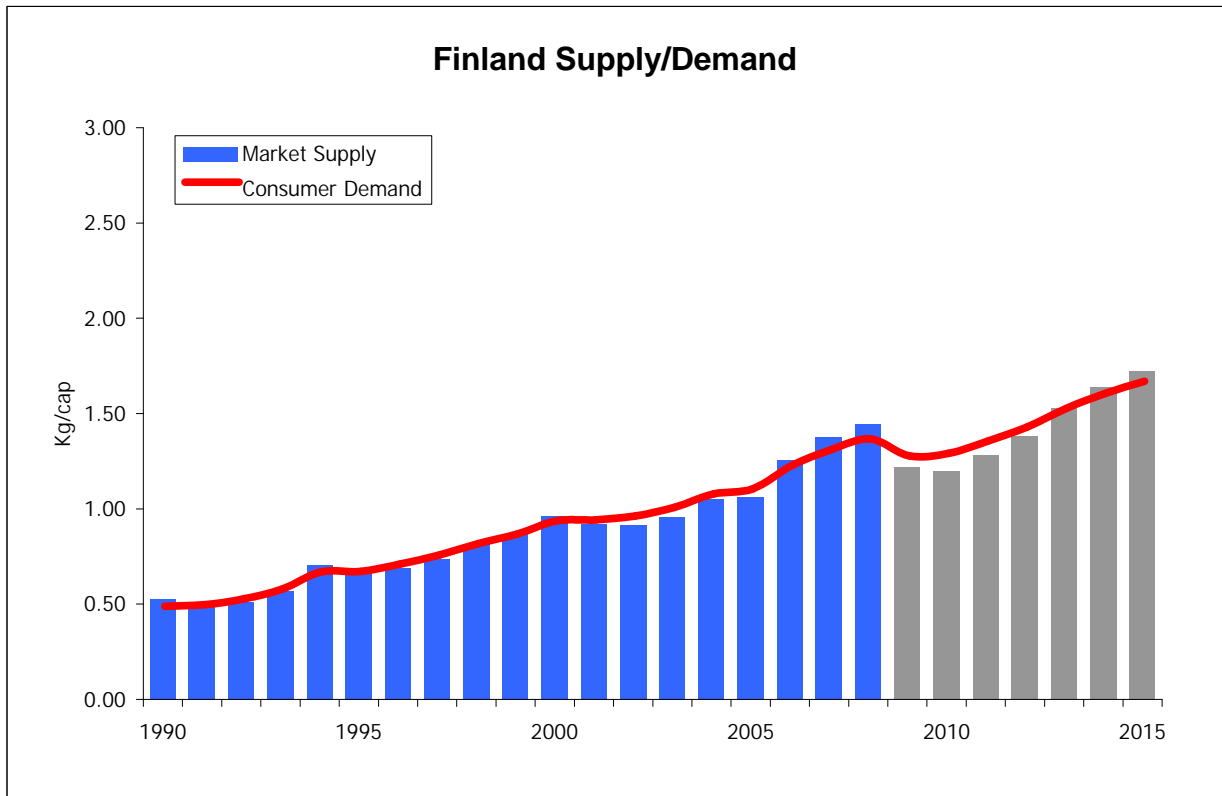
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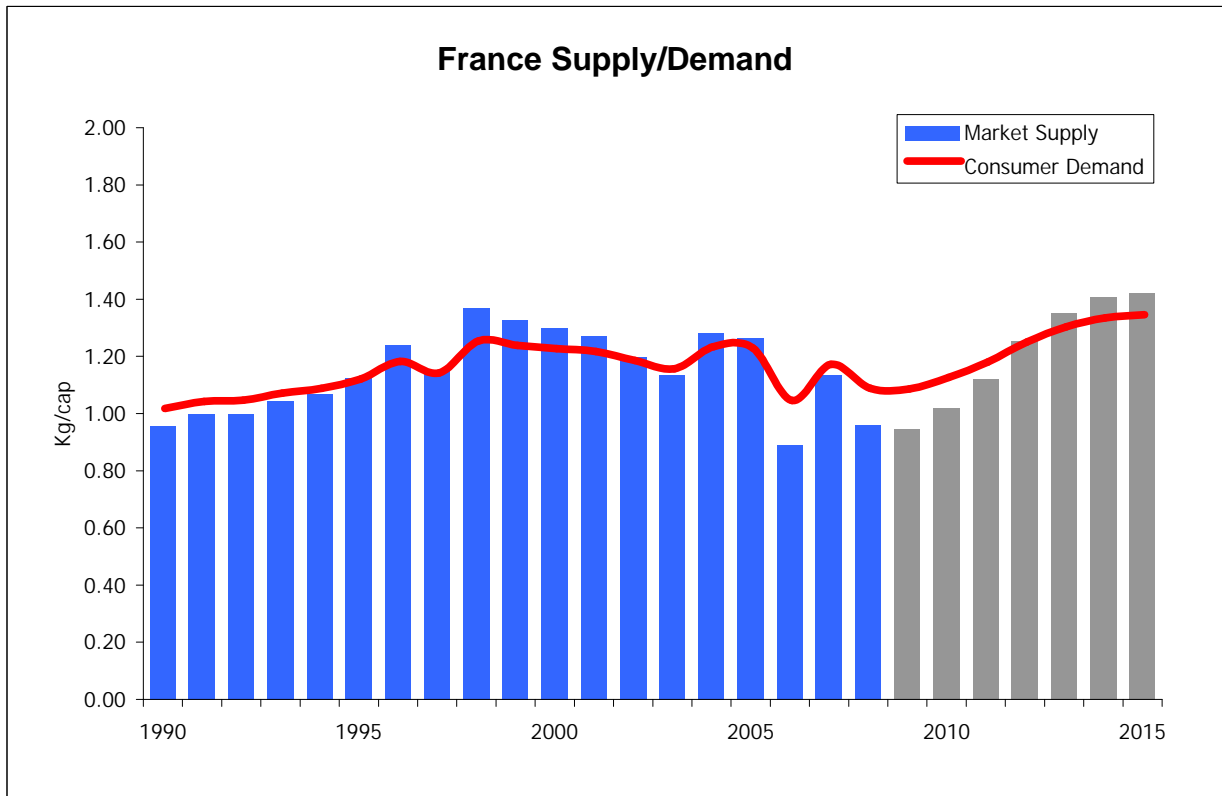
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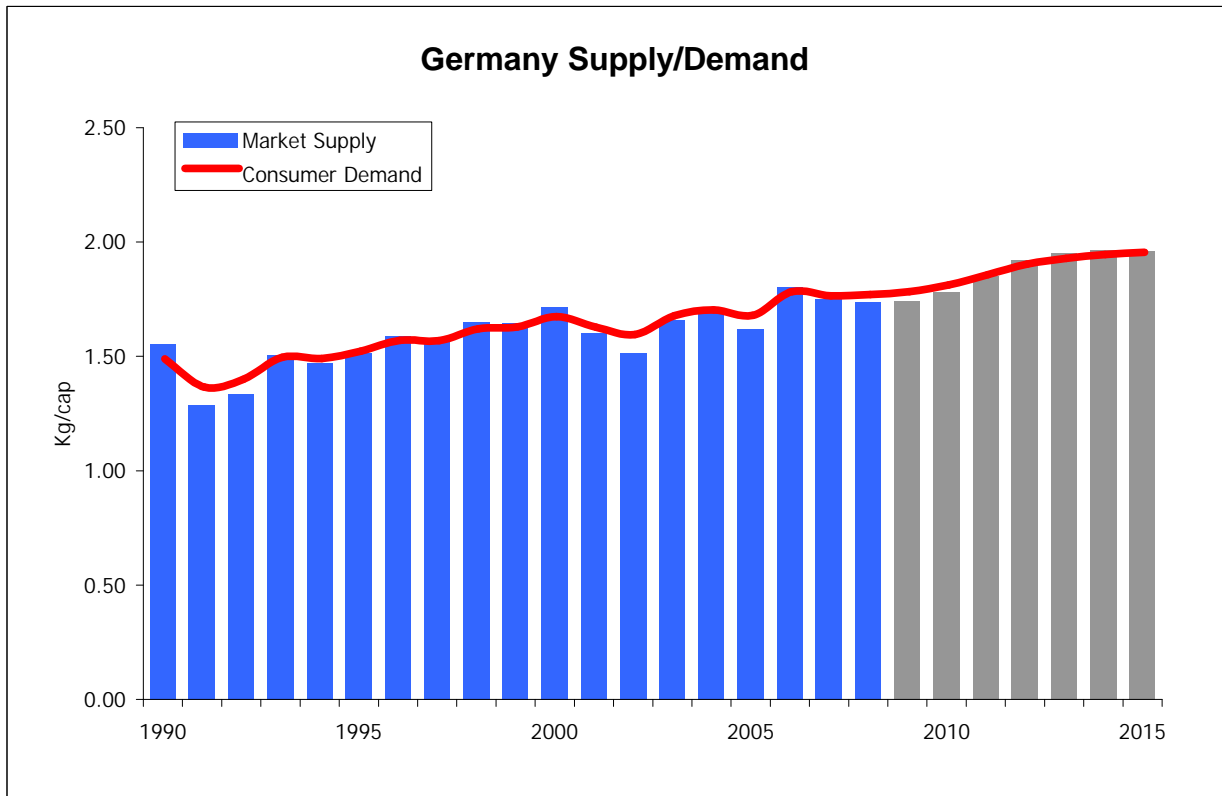
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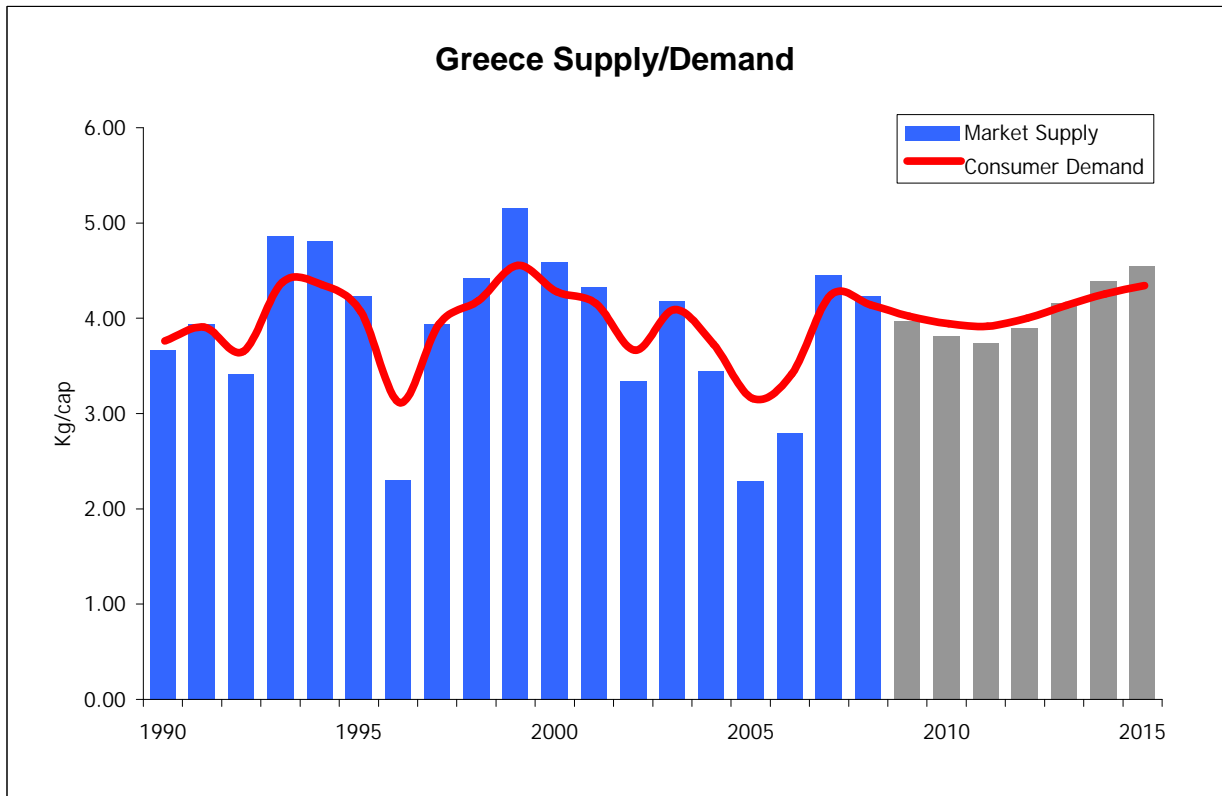
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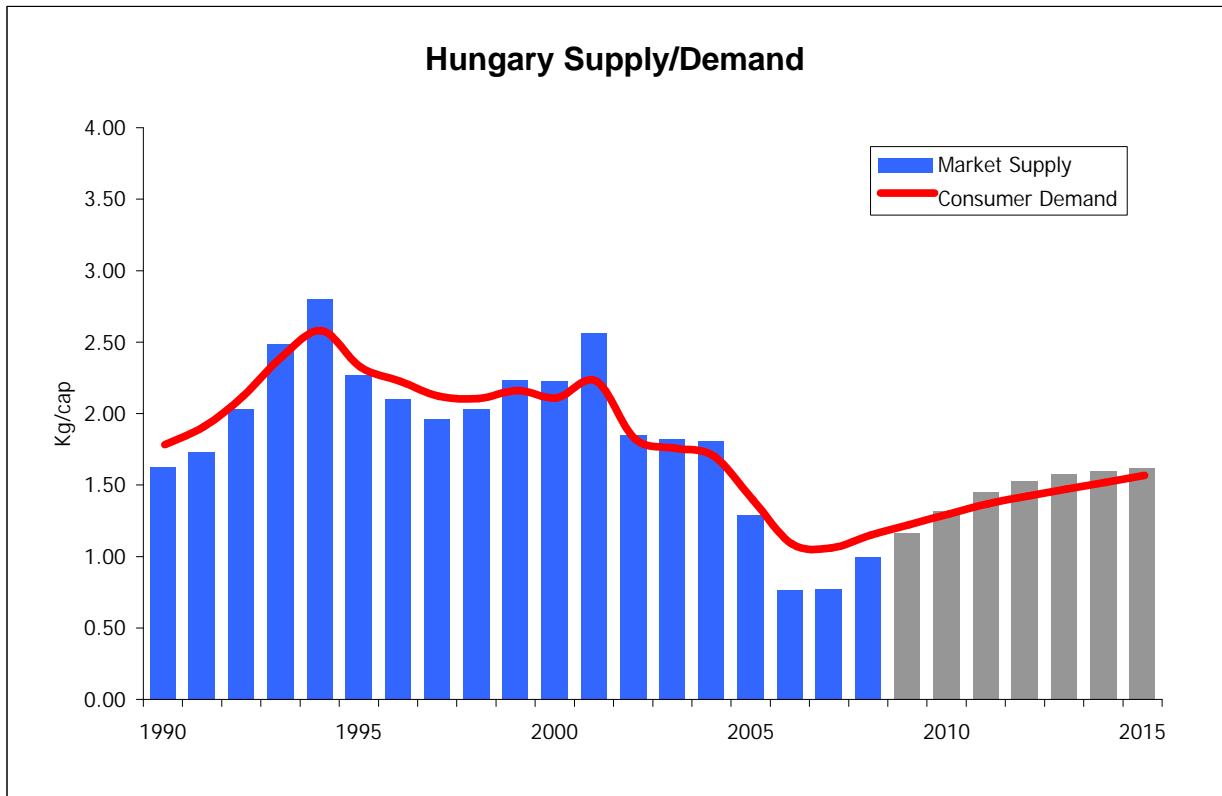
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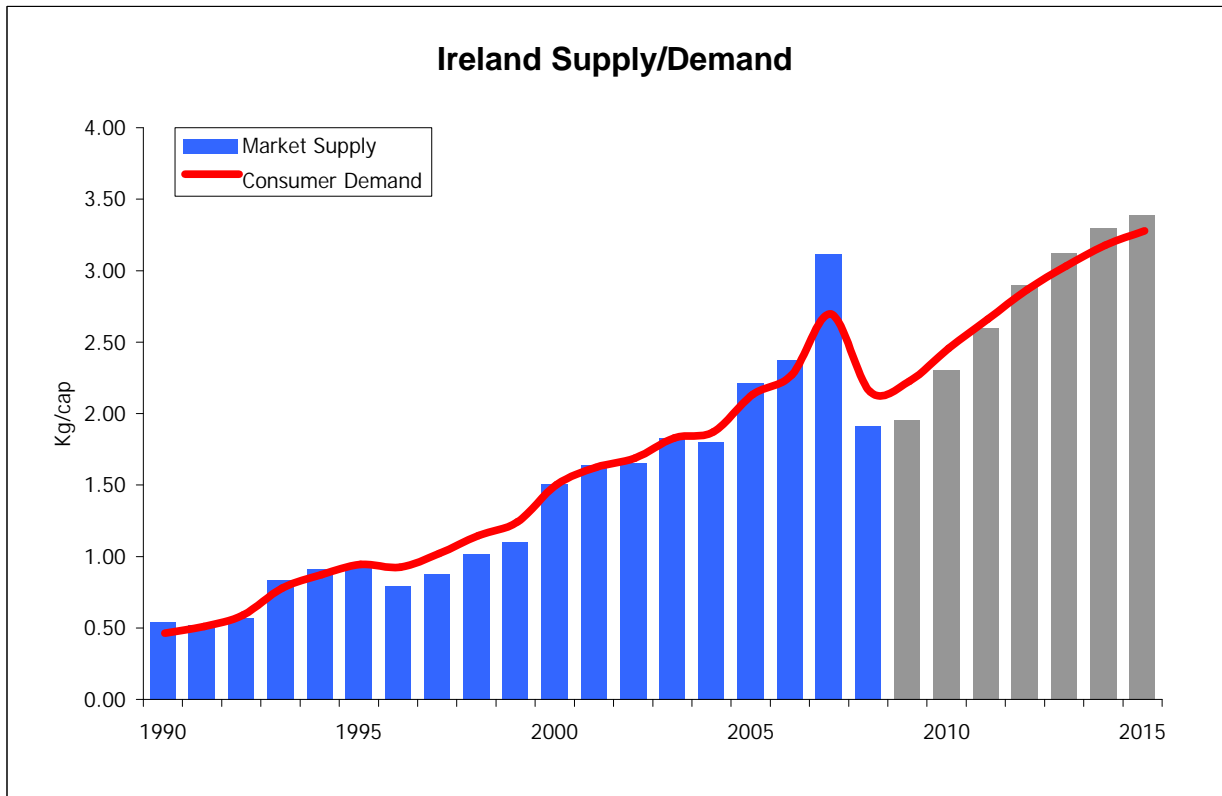
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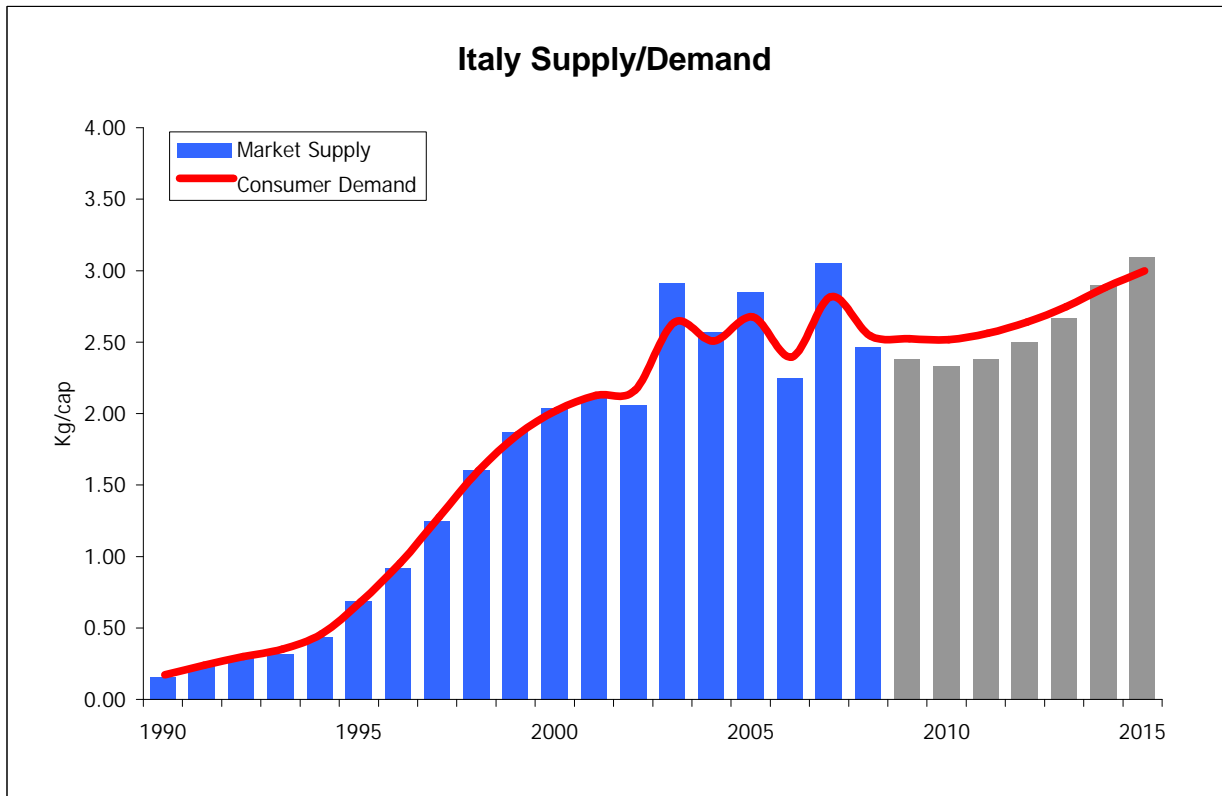
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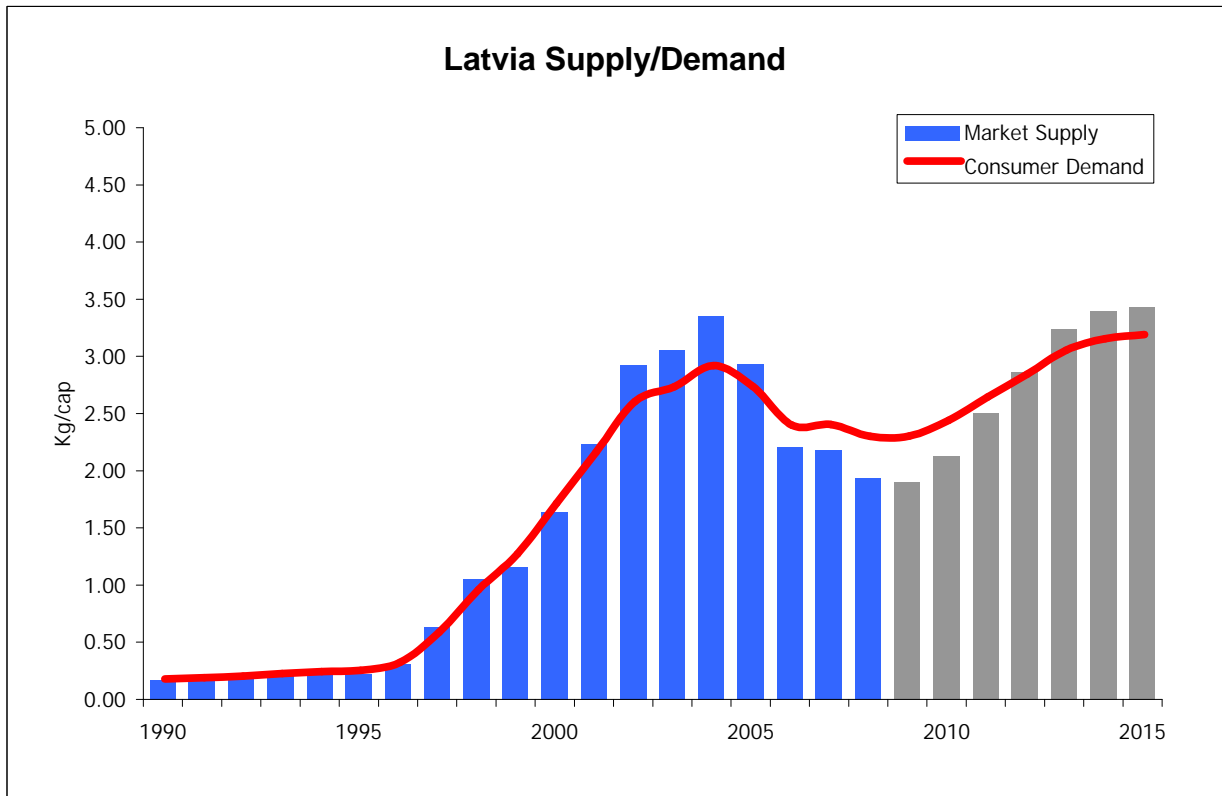
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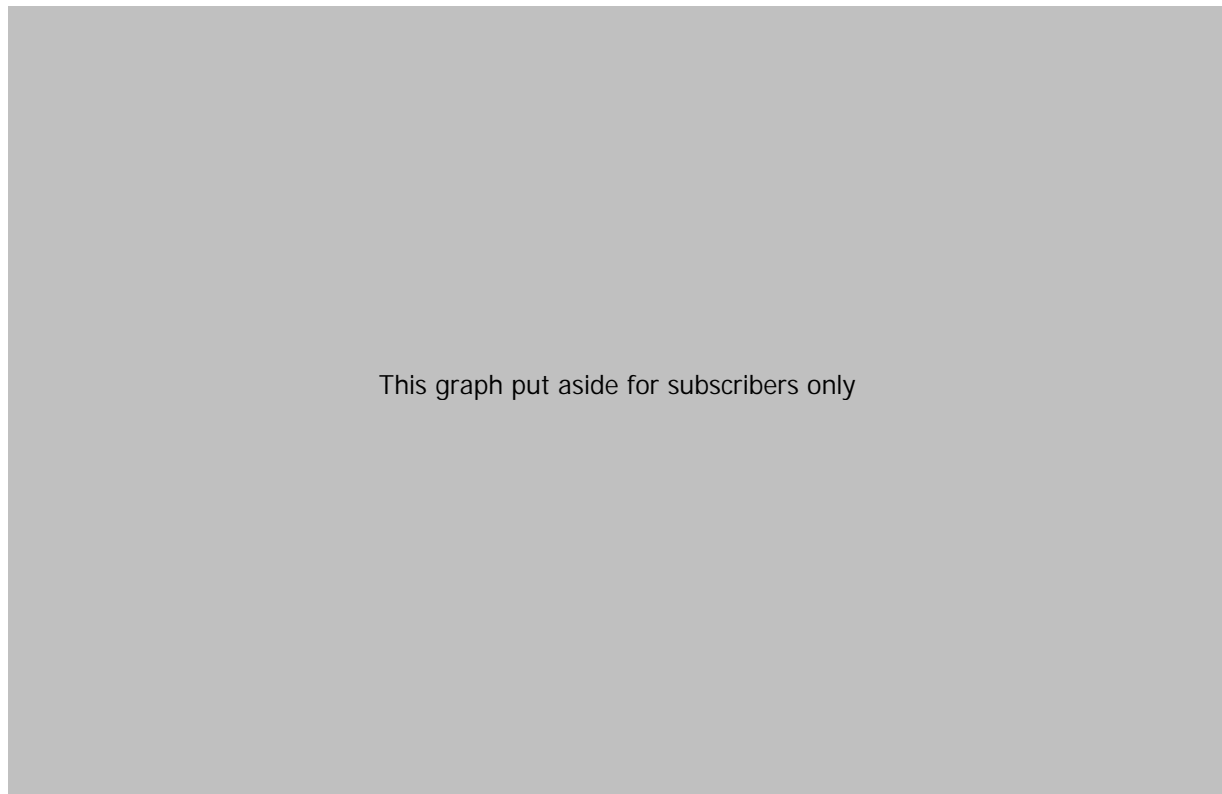
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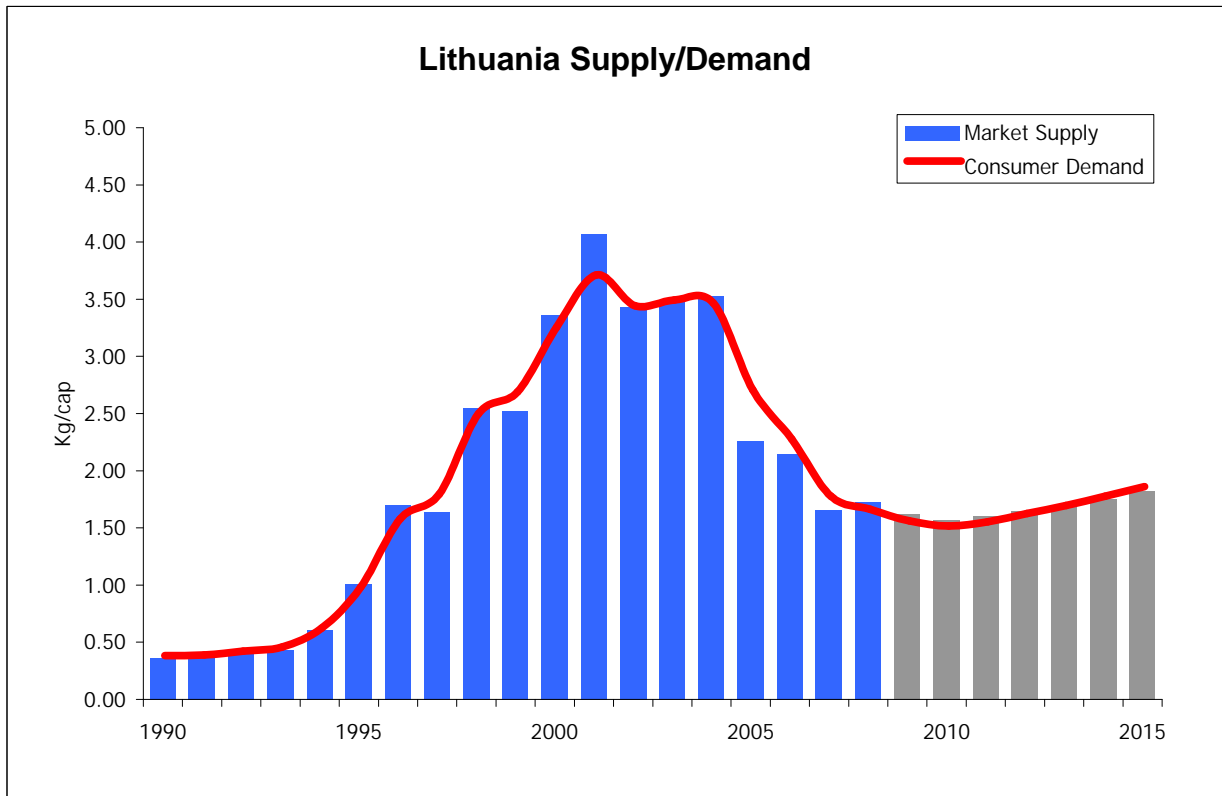
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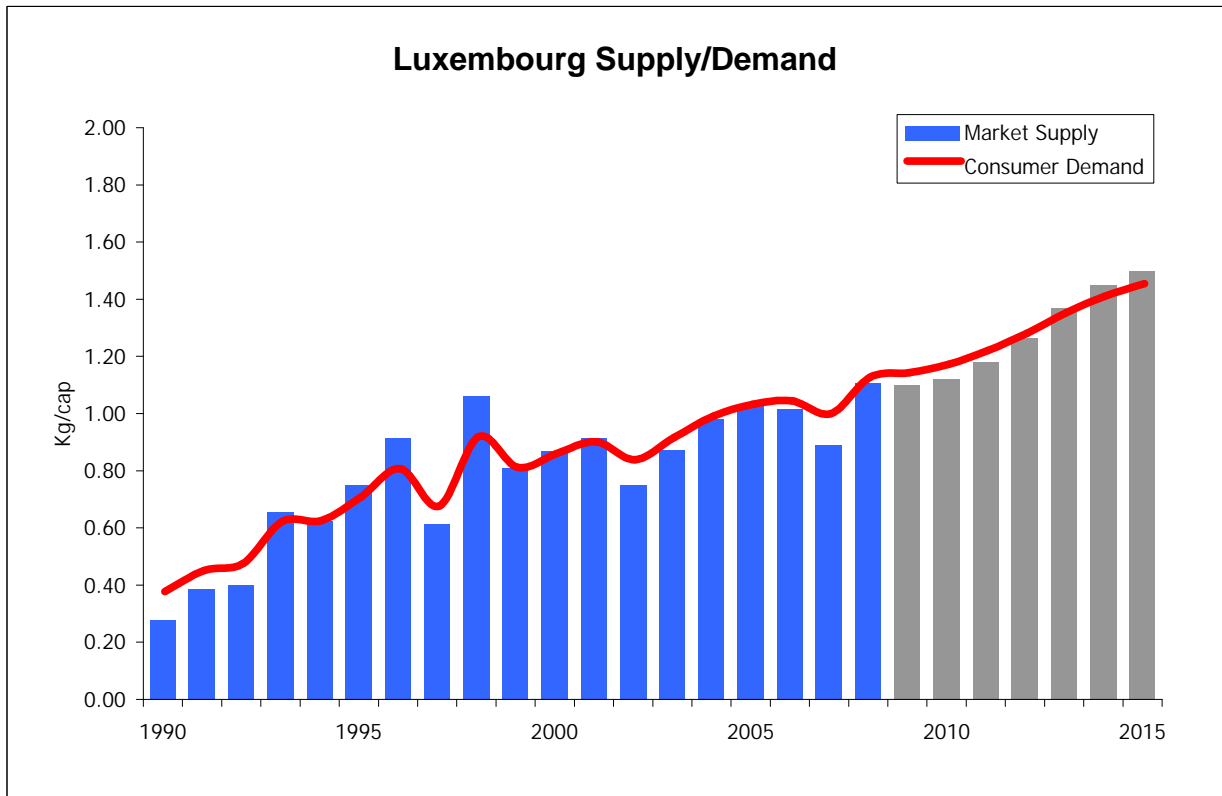
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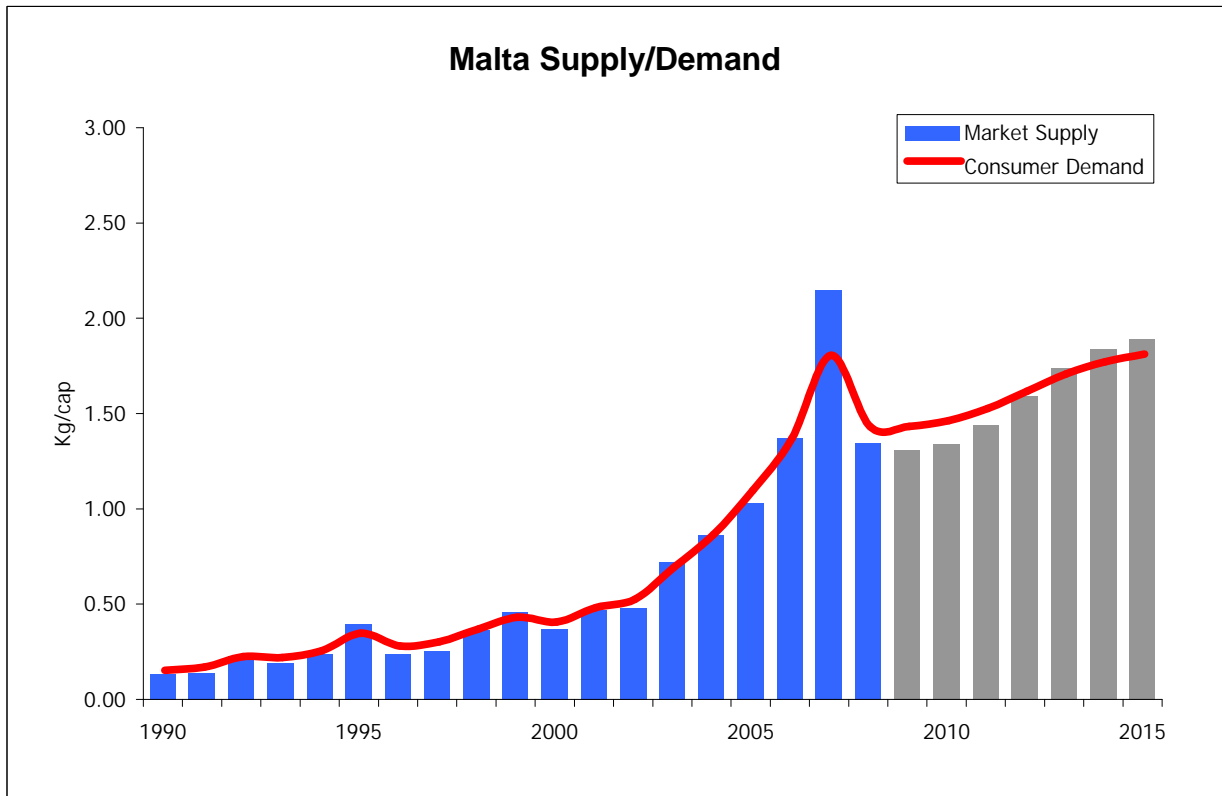
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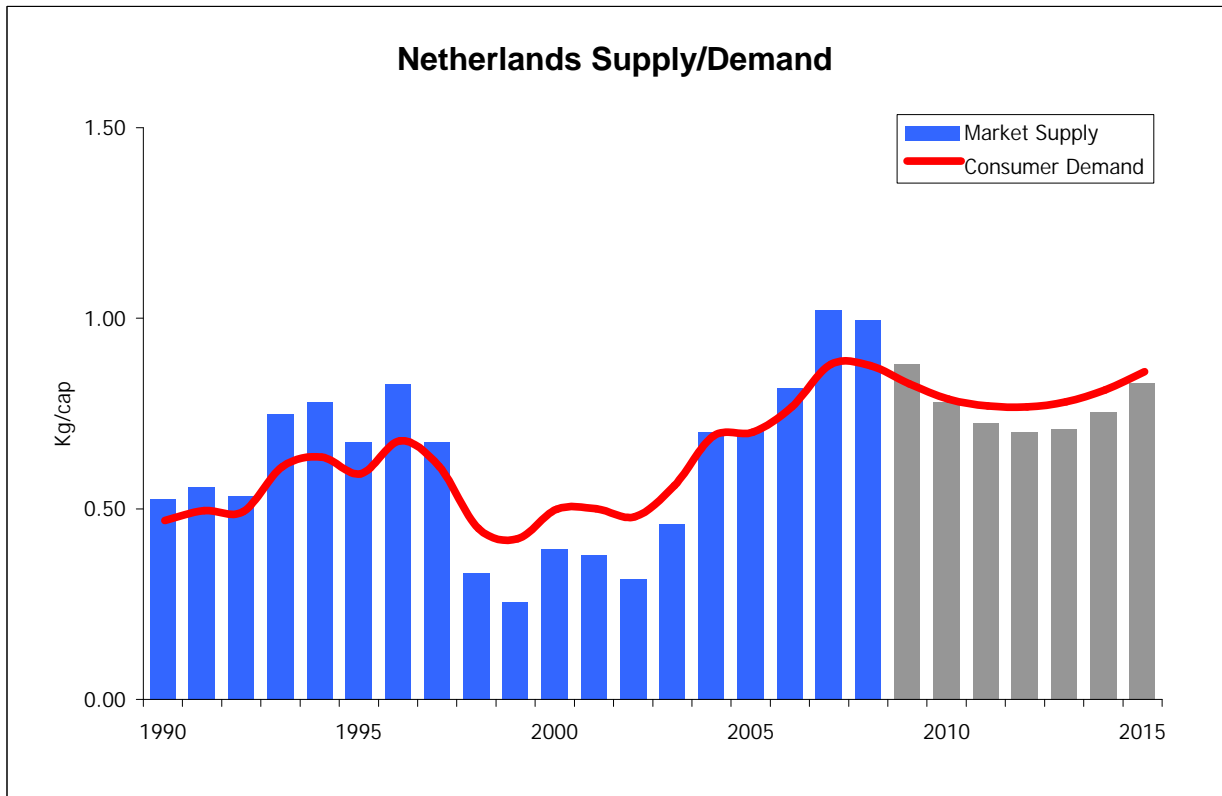
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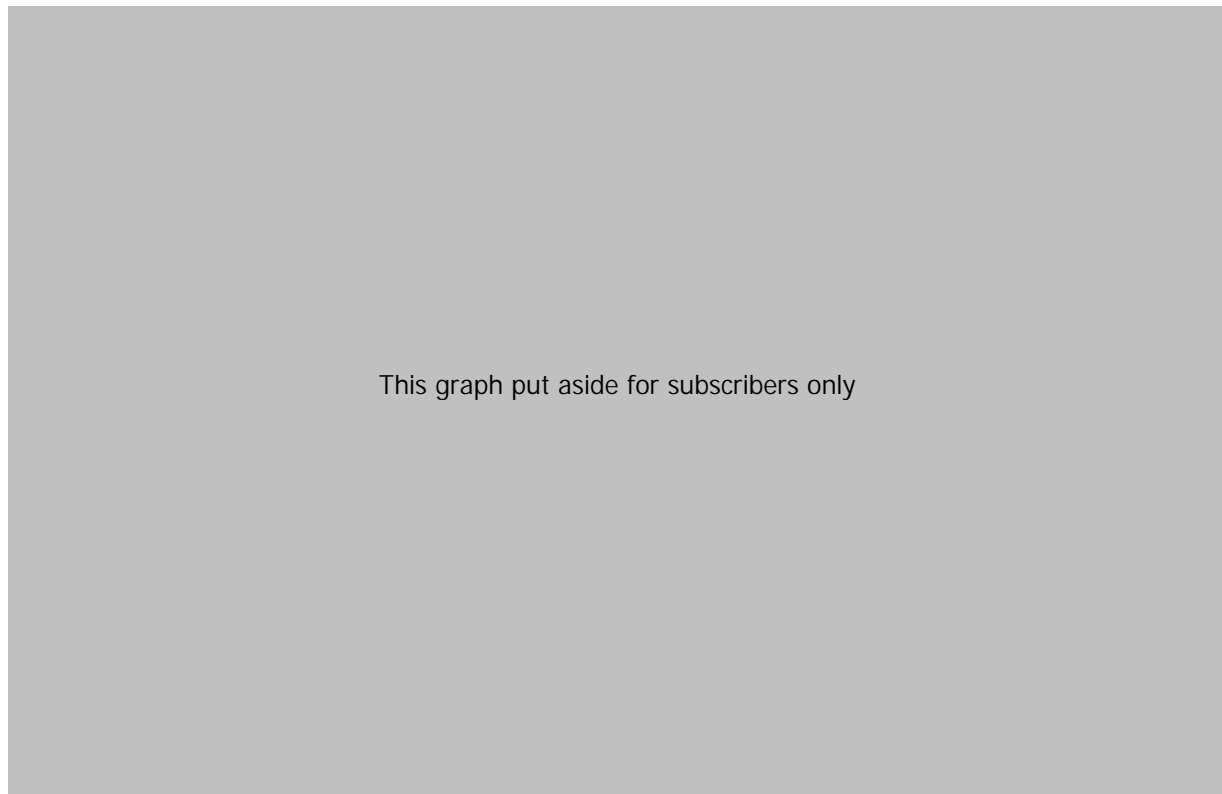
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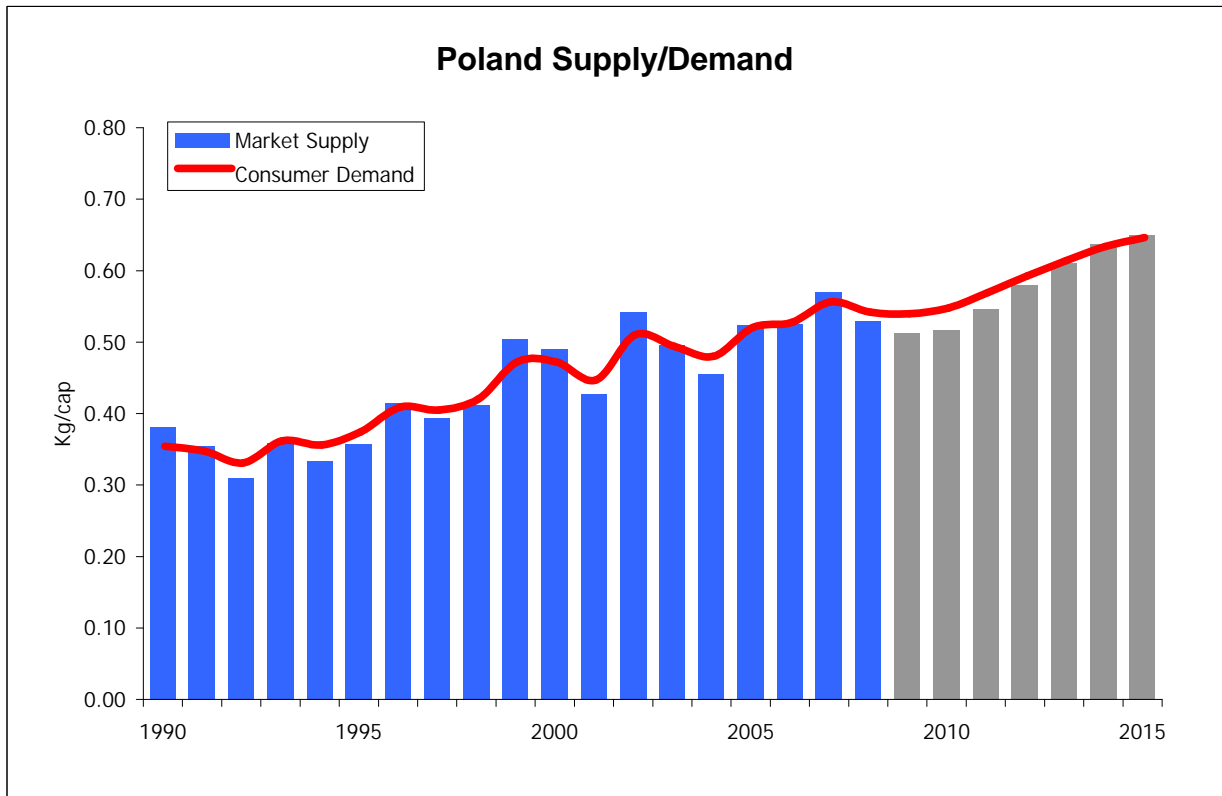
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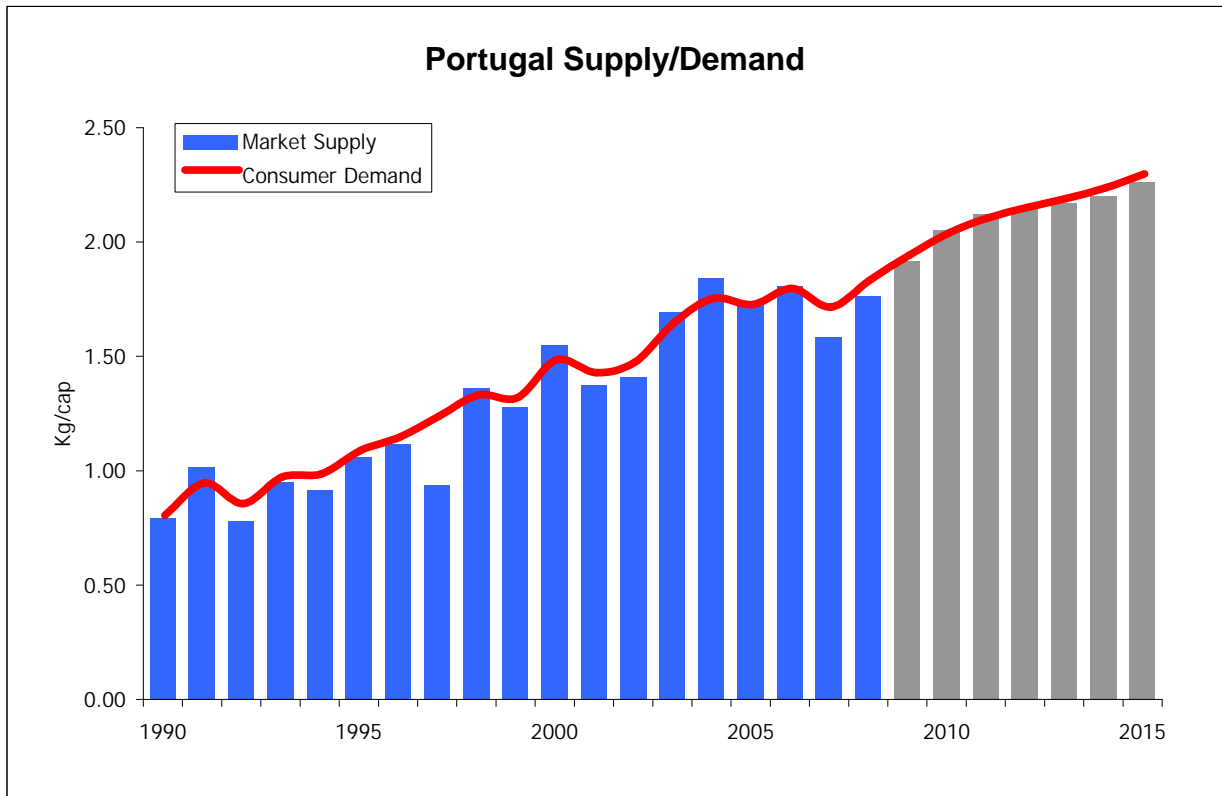
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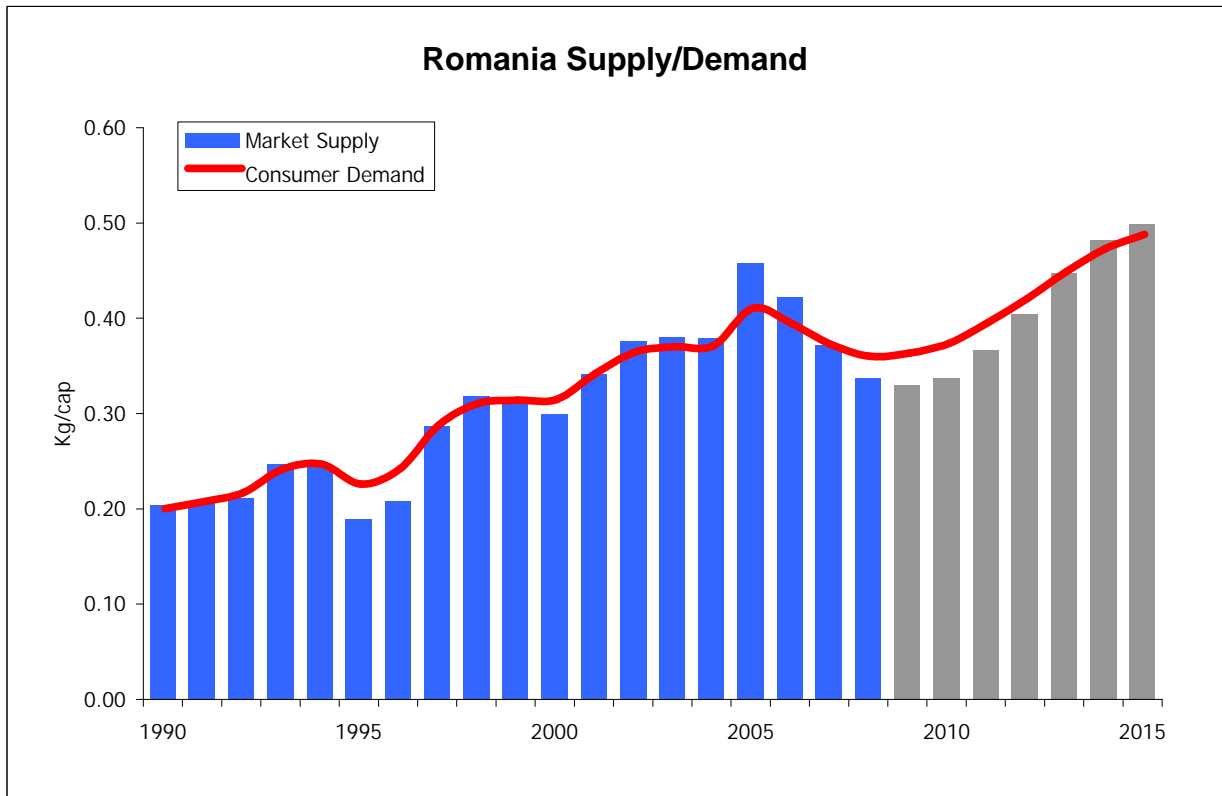
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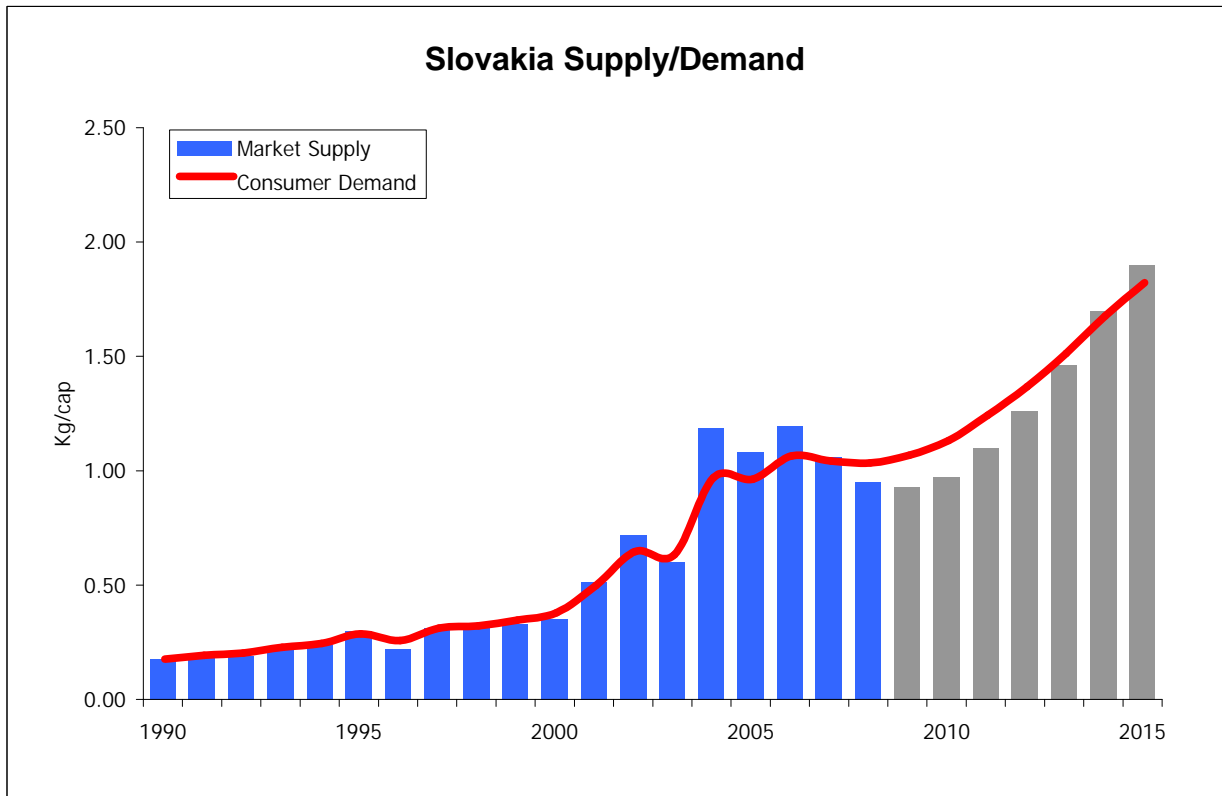
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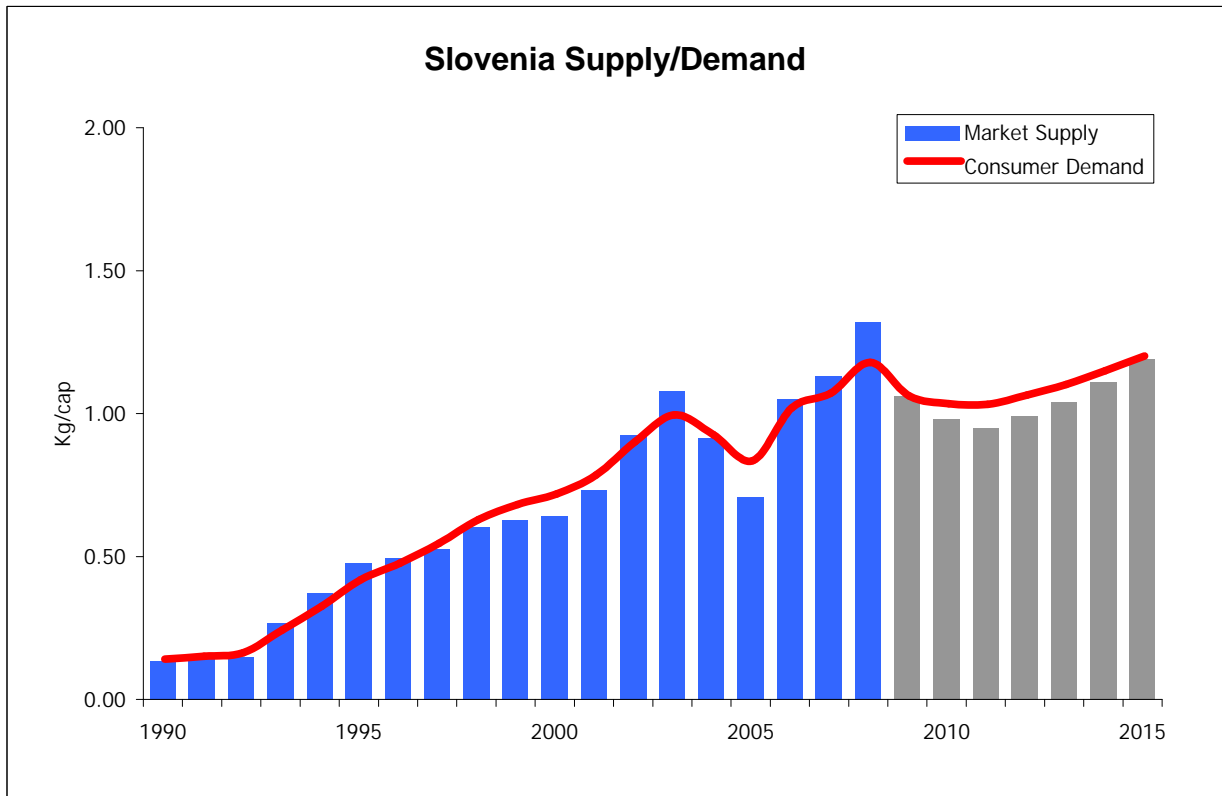
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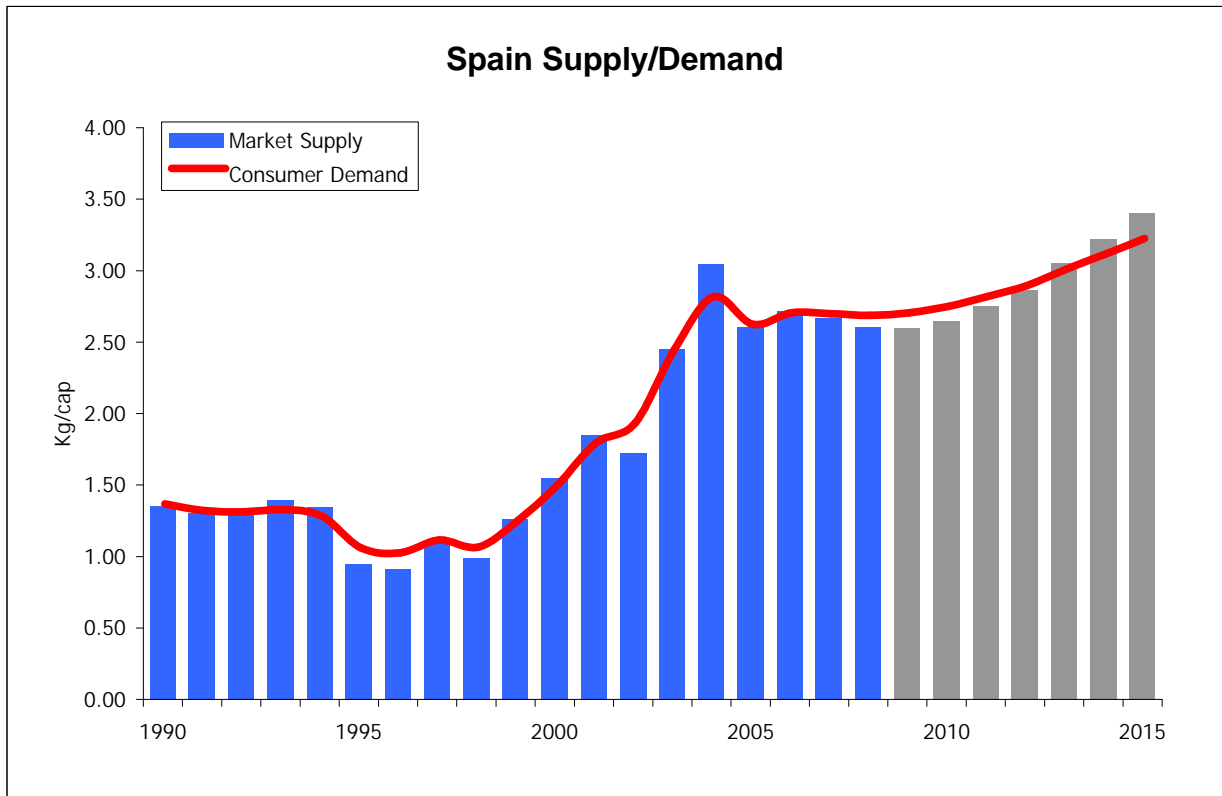
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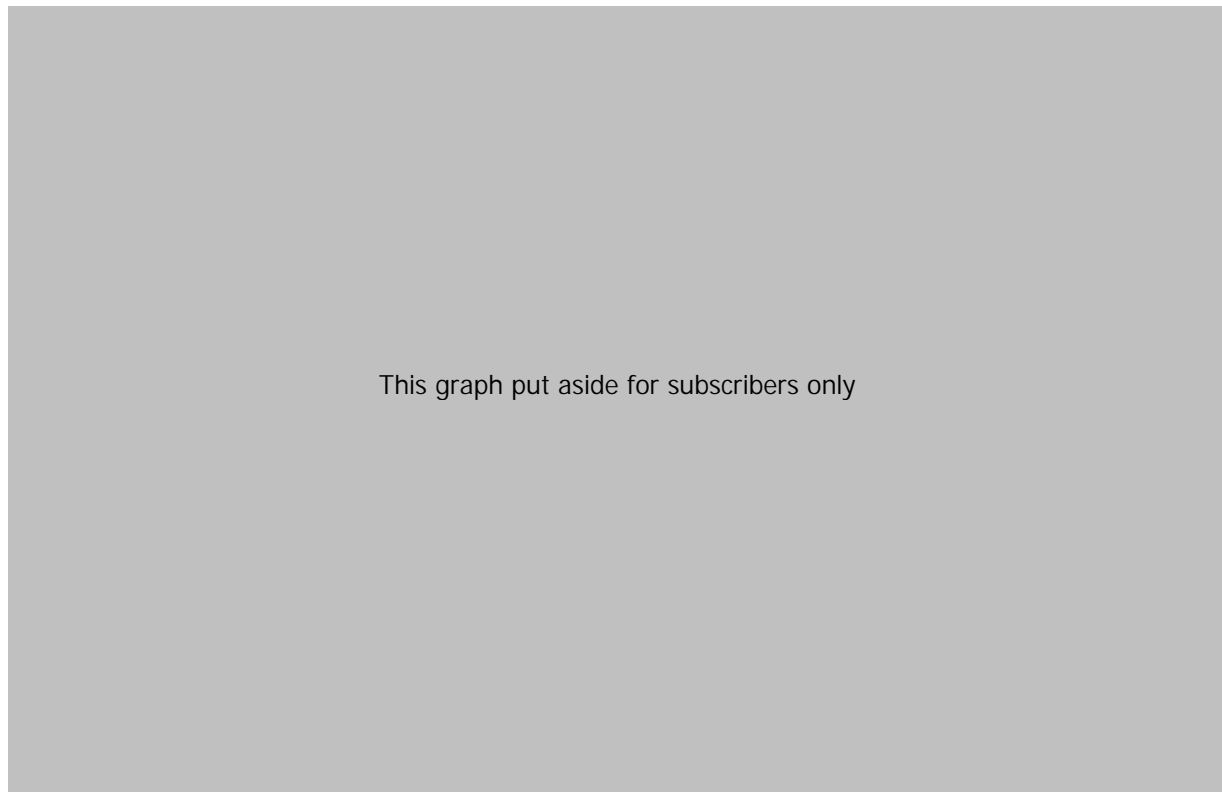
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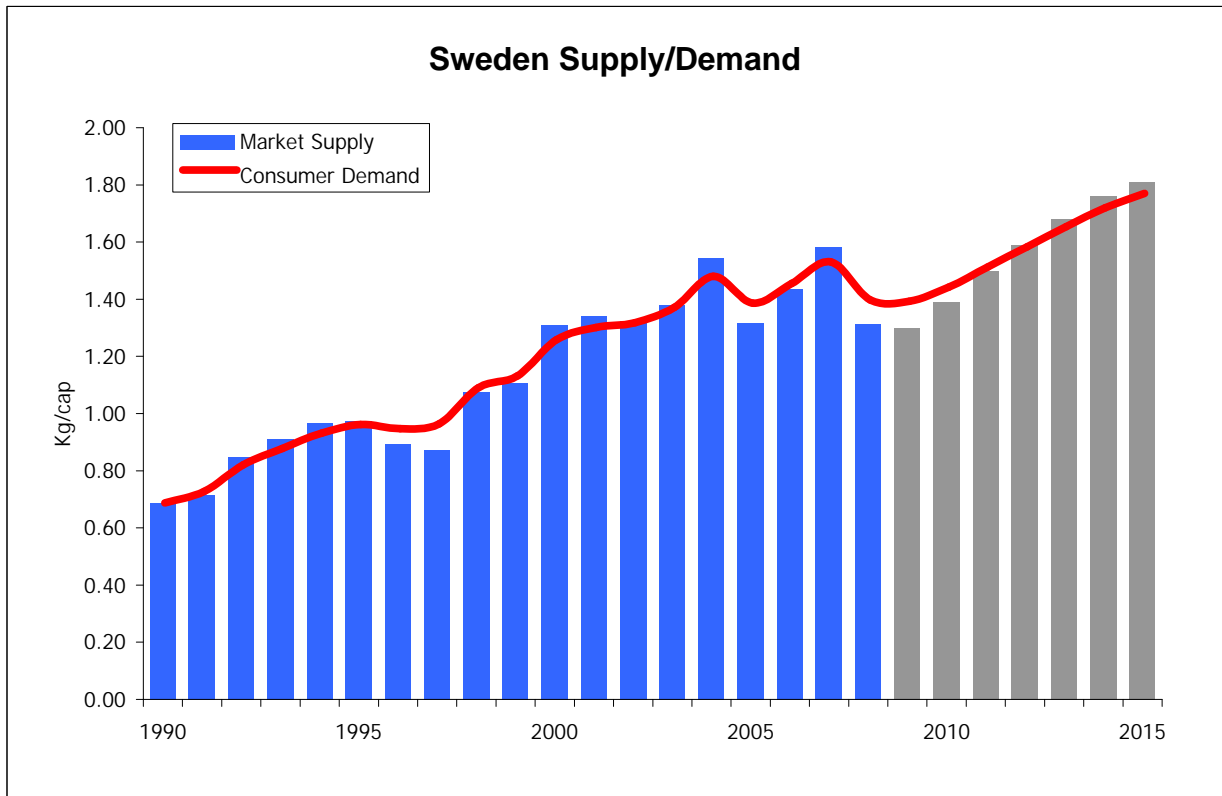
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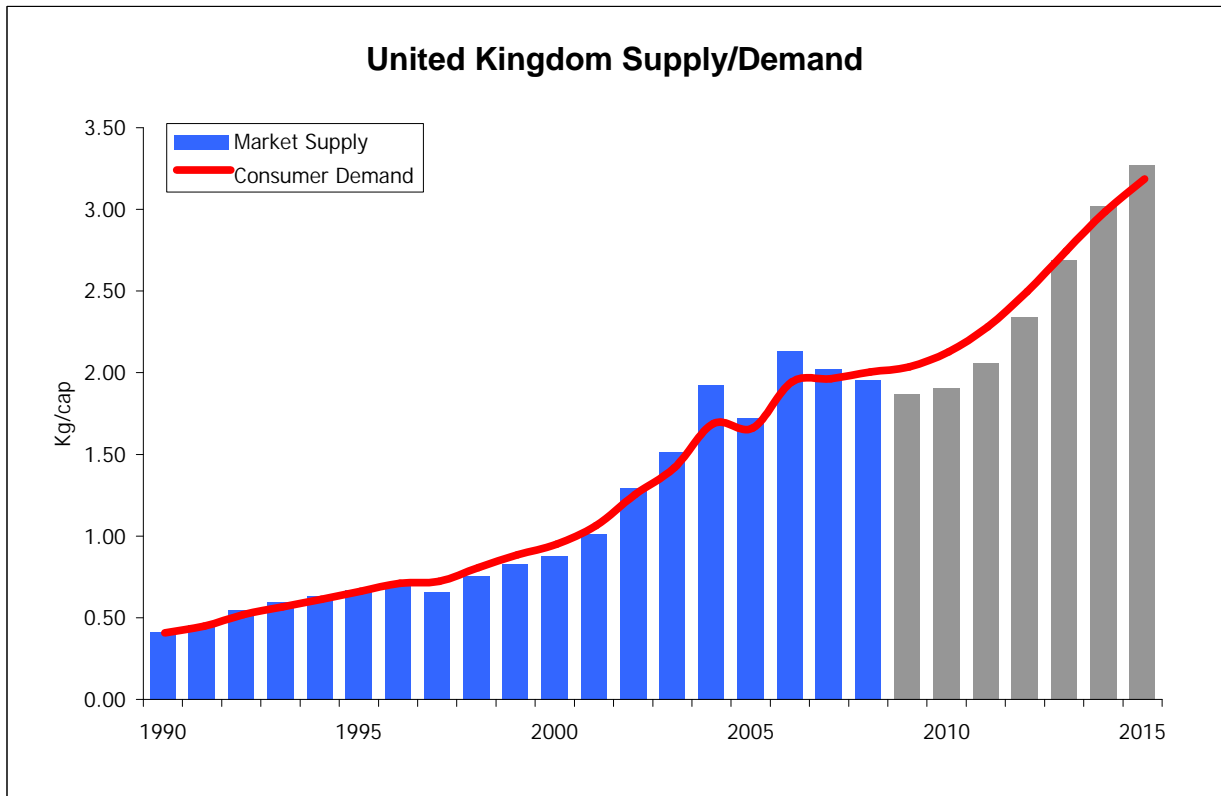
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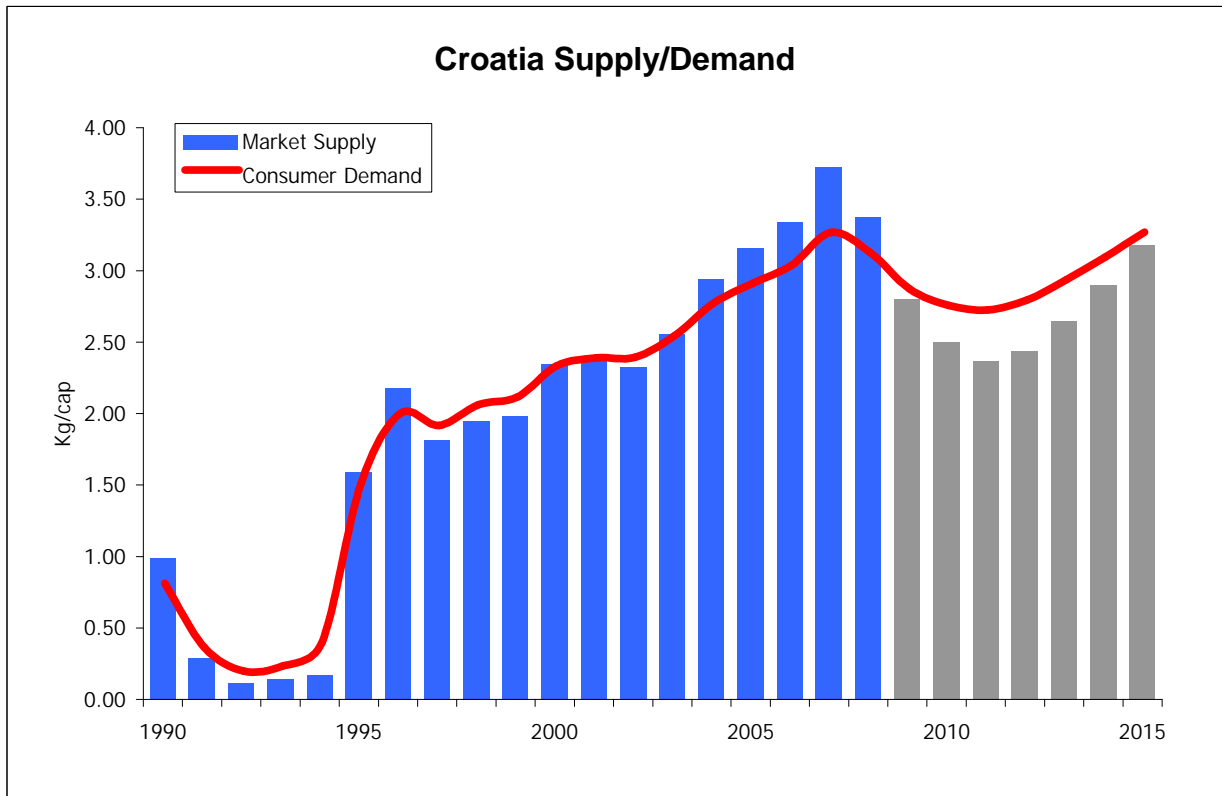
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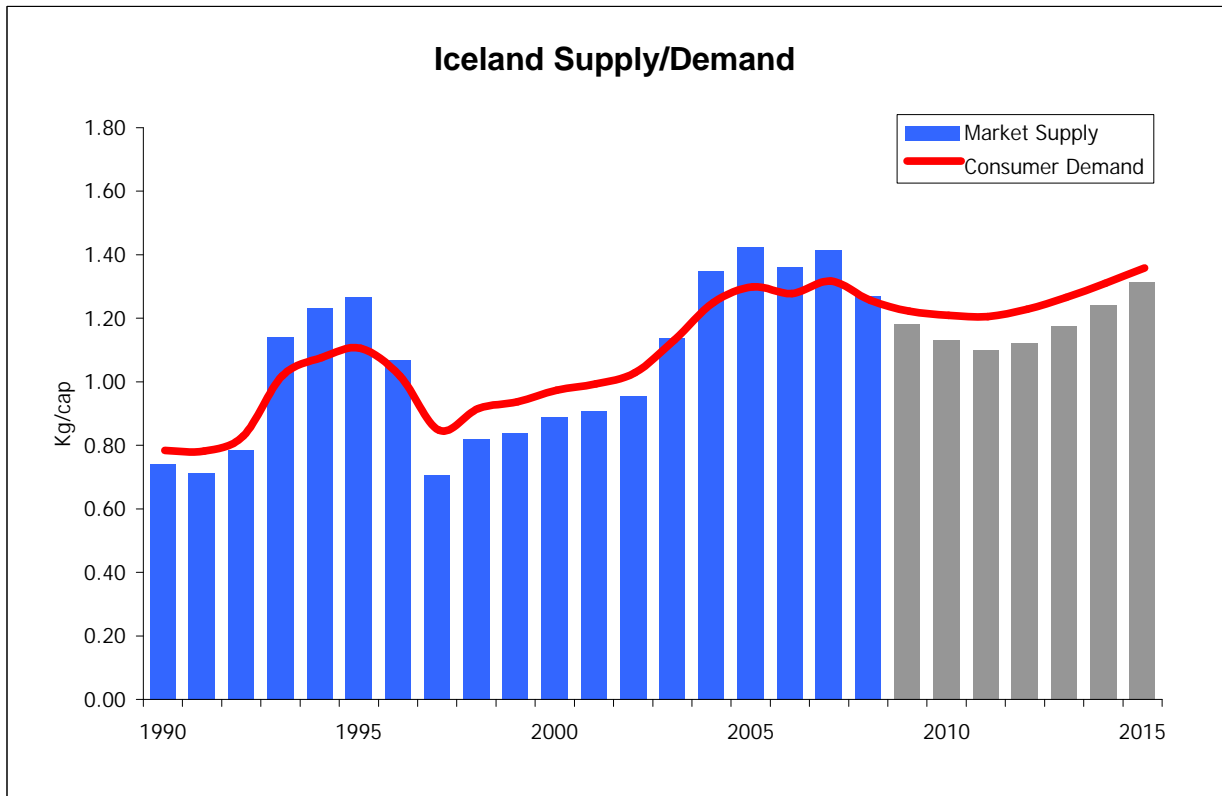
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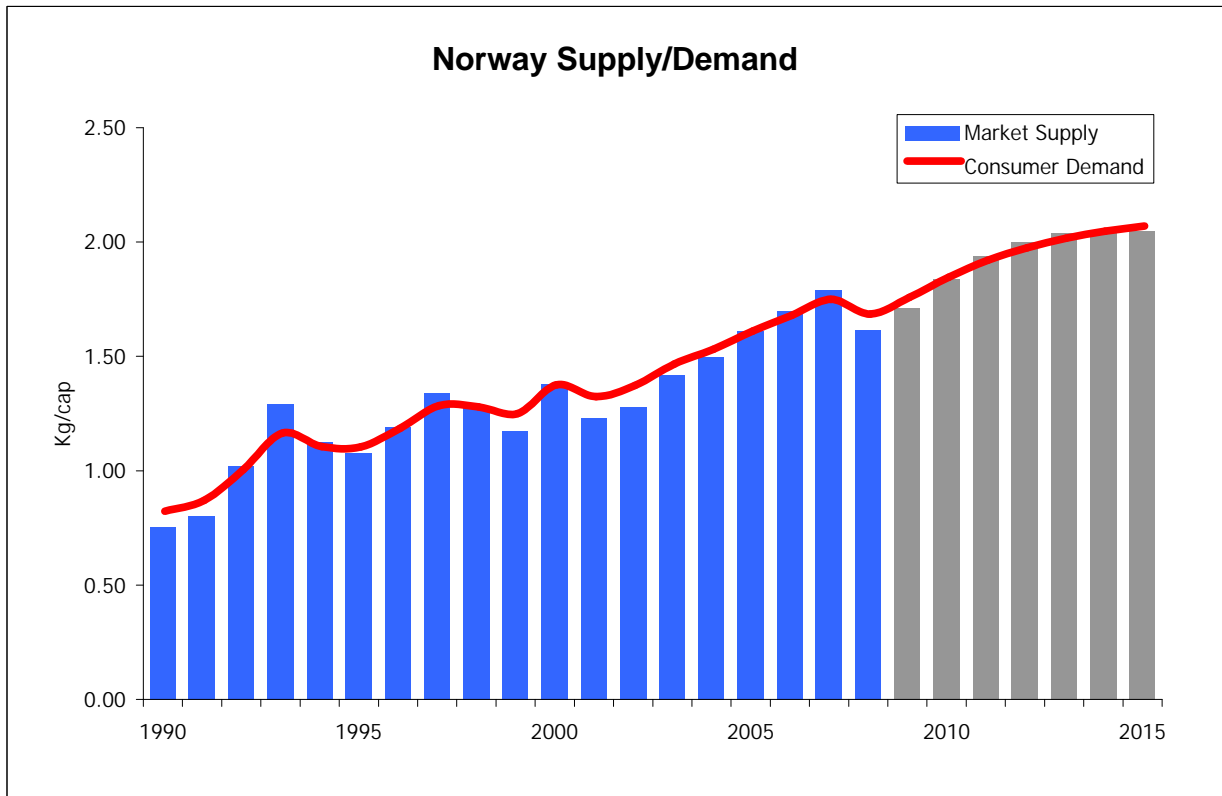
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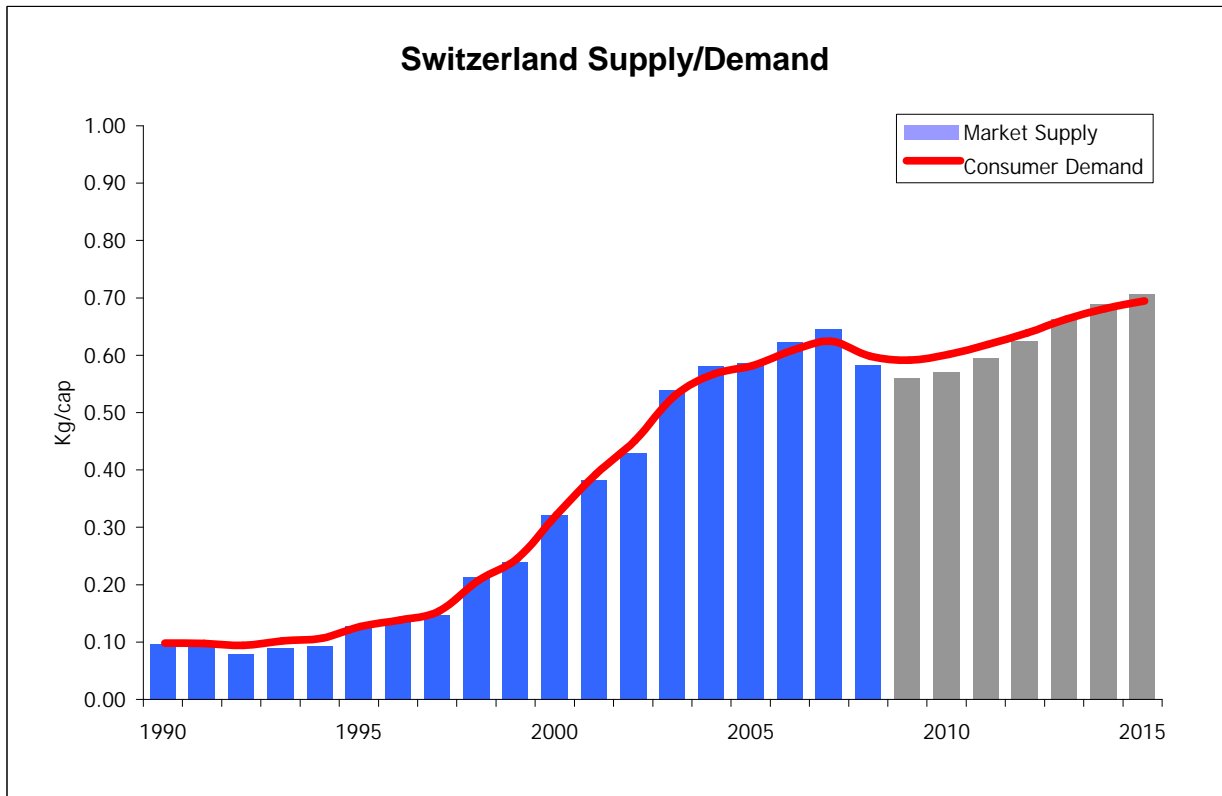
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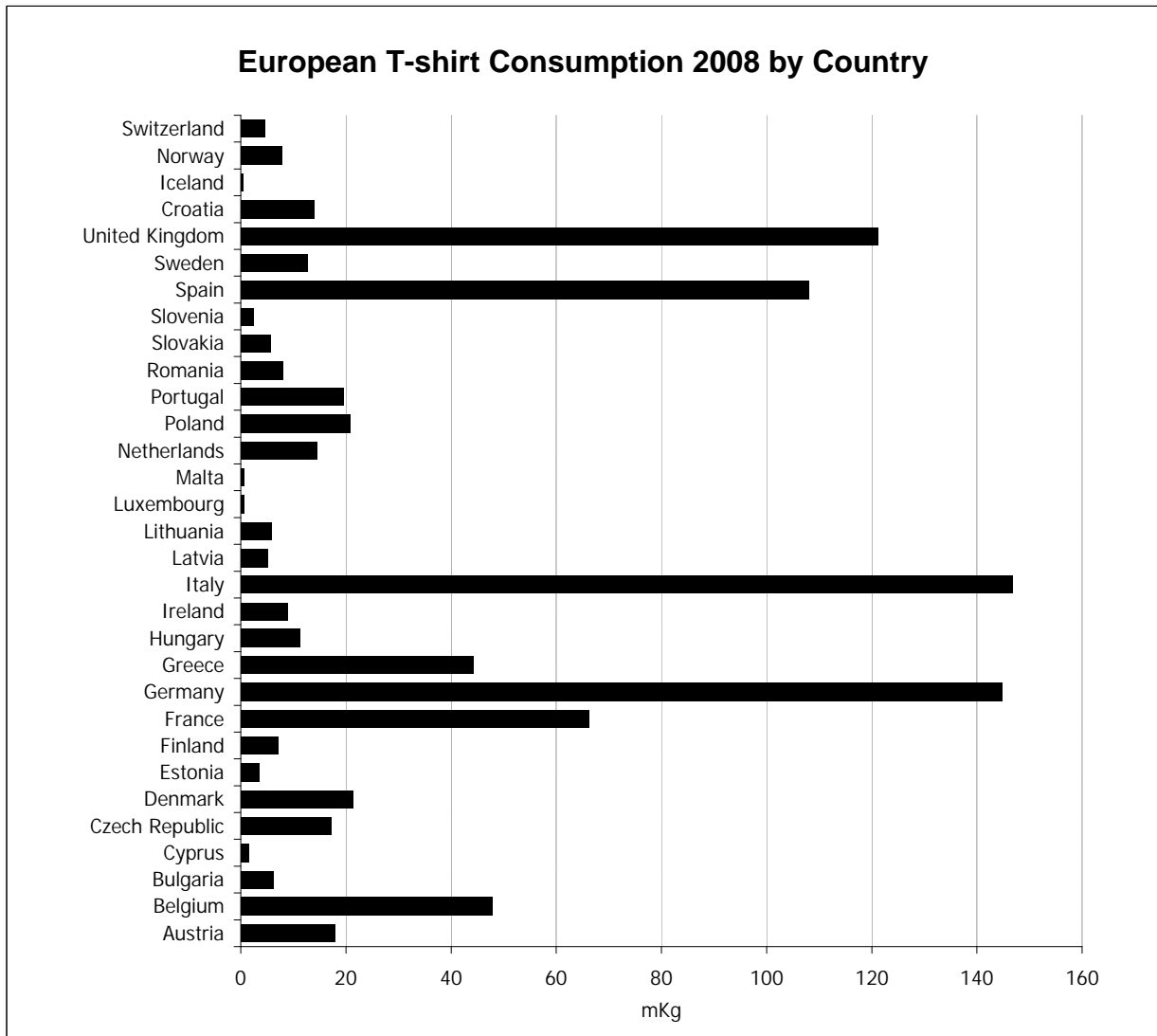
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About Textrends.org

Textrends.org publishes forecasts for United Kingdom home textile and apparel consumption. Information is available to individuals and organisations through an annual subscription to a secure, password-protected website or the purchase of reports directly from the Textrends.org web site. Special studies and bespoke analysis are undertaken by Textrends.org to agreed specifications.

Forecasts are generated from a model of the U.K./European textile system (see "The Forecast Method" below), the analysis undertaken by specialists, each with over a decade of experience forecasting in the fibre, textile or petrochemical industries.

The Forecast Method

Consumption is forecast by extending forward a historic trend of annual apparent demand data points, the trend fixed by fractal analysis and using the study of cumulative stocks in the textile pipeline. The technique is data-driven, exploits the movement of the textile cycle, and is independent of all extraneous factors and bias including media, politics and economic fashion. (Indirectly such factors may help explain the resultant forecasts, but play no part in our analytical technique.)

For the U.K. market apparent demand is calculated for over 200 separate categories of textile and apparel goods. These are grouped into around 80 apparel categories and 9 home textile categories, and demand forecasts calculated for each. The full range of categories can be viewed on the Textrends.org website. For studies in the European market we use the same analytical technique, but focus on a more specific data set.

Our forecast methodology is detailed, transparent and proven: if you want more information then we will be happy to discuss our approach with you.

More Information

Please feel free to contact us to ask any question about a subscription to Textrends.org, other reports we publish, our pedigree or our forecasting technique. Our office hours are 09:00 to 17:00, Monday to Friday, excluding U.K. public holidays.

Contact us

by telephone + (44) 01737 213094
by email hello@textrends.org
our website www.textrends.org

Terms Specific to this Report

T-shirts T-shirts covers all types of knitted T-shirts, vests, singlets and similar underwear, capped and short-sleeved, made from any textile materials.

Europe Includes all of the countries in European Union (**EU27**): Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, and the United Kingdom. Europe also includes Croatia, Iceland, Norway and Switzerland, together we group these into **Other Europe**. Turkey is not included in our definition of Europe. Albania and some states of Former Yugoslavia are excluded while we await the arrival of more accurate data, namely Bosnia & Herzegovina, Serbia & Montenegro and TFYR Macedonia.

Terms Specific to this Report (continued)

Years In this report years 1990 to 2007 are "historic", 2008 is "current", and 2009 to 2015 are forecasts calculated from the Textrends.org forecasting model.

General Terms

We provide below some brief definitions for terms used in this document and others published by Textrends.org. The Textrends.org website carries a little more detail on some of the consumption concepts, and if the reader requires answers to specific questions we invite them to contact us (see above).

Apparel being all items of clothing and accessories made from textile materials (incl. leather, but excl. hats and footwear).

Home Textiles are those goods made from textile materials for home use, including carpets and rugs.

Menswear - all articles of apparel usually associated with, and designed for males, including those for boys.

Womenswear - all articles of apparel usually associated with, and designed for women, including those for girls.

Women's & Men's - in most cases also include boy's and girl's.

C&S - cut & sewn garments (as opposed in our analysis to knitted garments).

mKg - millions of Kilograms = thousand tonnes.

Kg/cap - Kg per capita, per head of U.K. population.

% p.a. - compound annual growth rate, expressed as a percentage.

Market Supply (Apparent Demand) is the volume of product available to the market for consumption, our measure of "supply", calculated from statistics.

Underlying trend (Theoretical Demand) is the trend of market supply (apparent demand); because only apparent market demand is measurable by statistics the underlying trend is over time a representation of theoretical long-term consumption.

Consumer Demand is probably the best indicator of "true" or "real" consumption by the end-user, it is the "use" of apparel or home textiles, and is calculated to exist at a point between apparent demand (calculable by statistics to represent market supply) and the underlying theoretical trend.

Cumulative (accumulated) Stock is the total volume of textile and apparel product that has accumulated over the years, in any form, within the textile system. This is a theoretical measurement of stock, over and above the minimum level of working stock that can ever exist at any time in the textile pipeline. The consideration of cumulative stock is central to our analysis, not least because their measurement fixes the long-term underlying trend and reveals the presence of given markets textile cycle.

The Textile Pipeline is the system that contains apparel and home textile goods, in whatever form, and these goods can exist anywhere between domestic manufacture and the final consumer; (it is also sometimes called in our work the "supply pipeline").

Notes on Per Capita Comparisons between Countries

Per capita values usually allow us to make meaningful like-for-like comparisons of the consumption of a particular product between countries, but we must use the measurement with care. In some instances country data can be distorted and give an unrepresentative view of supply and demand.

In a few countries apparent per capita consumption appears too high and for the following reasons.

A. The country in question operates as an import "gateway" to other markets. Imports are faithfully recorded and this represents an increase the country's consumption, but some proportion of imports may be in transit to neighbouring markets but these outputs from the country system are, for many reasons, under-reported. The net result of this scenario is an artificially high level of apparent consumption. This is sometimes the case, for example, for Belgium (for goods transhipped to the European heartland) and for the Balkan states (for goods shipped to Russia).

B. Sometimes textile processing in a country is substantial and forms a significant part of the wider economy, but the resulting high activity is not fully translated to trade statistics and this gives the impression of higher than might otherwise be expected domestic supply and demand. For some products this is the case for Romania and Portugal, for example.

In the case of B. we believe it is possible to use our expertise and the application of a methodical system to estimate the level of excess apparent demand and reduce domestic consumption accordingly, the resulting consumption therefore not statistically accurate, but rather a reasonable rationalisation that provides a more realistic picture of supply and demand in a given country. In the case of A. we are not able to make any adjustment and, uncomfortable though it might be in some instances, we must take the statistics as read.

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**European T-shirt
Supply/Demand Report
2009**

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