



European
Commission

OPEN YOUR MIND

TEXTILE, CLOTHING, LEATHER AND FOOTWEAR
(TCLF) SECTORS IN THE EU



TEXTILE



CLOTHING



LEATHER



FOOTWEAR



TCLF: WEAVING THE FUTURE.

Passion. Growth. Opportunities.

These are at the core of the **Textile, Clothing, Leather and Footwear (TCLF)** sectors. A long path, rich in history and tradition, together with innovation, research and knowledge. Today the TCLF are among the most **innovative** and, at the same time, **productive** sectors in Europe with an annual turnover of more than **200 billion euros**, around **225,000 companies** and a **workforce of 2.2 million**, **66% of which is women**.

The TCLF industries are key economic operators in a large number of European countries, particularly in **Italy, Spain, Romania, Portugal, Poland and Germany**, with extra-EU exports being as important as the EU internal market. What makes European TCLF industries unique and appreciated all over the world? Creative design and style, care for details, colour trends and patterns, technology, innovation of materials and trends, high quality and standards, environmental performance and social accountability.



ANNUAL TURNOVER:
€200+
BILLIONS

NUMBER
OF COMPANIES:
225,000

TEXTILE
AND LEATHER:
64,100

FOOTWEAR
AND CLOTHING:
151,000

WHAT WILL DRIVE THE TCLF SECTORS IN EUROPE IN THE NEXT YEARS?

Let innovation rock the TCLF industries!

Manufacturers, fashion brands and retailers are now increasingly including the latest technologies, such as artificial intelligence (AI), blockchain, solutions that go from linear to circular economy, optical fibre and 3D printing.

A brand new experience for companies, workers and consumers. Work with us!

1. ROBOTICS AND AUTOMATION

Automated technologies, exoskeletons, 3D printing, robotic sewing systems, knitting machines and laser cutting have brought major disruption to the TCLF industries in terms of employment and production. These have a wide range of potential benefits, such as **streamlined “just-in-time” production, reduced inventories and waste, lower transport costs and delivery times and improved product quality.**



2. DIGITALISATION

The number of potential applications of **digital technologies** and the related **cost savings** is enormous. From radio-frequency ID (RFID) tags to sensors and the Internet of Things, augmented virtual reality (AVR), blockchain and AI, digitalisation is bringing disruption and a world of possibilities in the TCLF sectors.



3. BETTER MATERIALS AND SMART PRODUCTS

A revolution of opportunities is also given by the use of brand new technologies leading to **innovative materials**, with improved environmental performance, for example, connecting the user to web applications, enhancing aesthetics or protecting the wearer against potential threats. Also, research and engineering lead to profound changes in TCLF industries. **Good for the environment, and good for consumers.**



HIGH EMPLOYABILITY & VARIETY OF EMPLOYMENT OPPORTUNITIES

The technological advances and the potential of robotics and automation open the way to new and unprecedented **employment opportunities** across the entire TCLF supply chains, not only in **manufacturing** but also in **design**,

marketing, finance, logistics and retail. The TCLF employ more than **2 million people** and SMEs, in particular, are an engine of job creation and innovation thanks to their ability to adapt to new trends and drivers.

LATEST PROFESSIONAL OCCUPATIONS IN THE TCLF INDUSTRIES

The TCLF dynamic industries are progressively requiring **new skills and professional profiles** are quickly evolving. For example, did you know that specialised tannery technicians are fundamental in the leather sector? Or that 3D designers and pattern makers are

stepping ahead in the footwear manufacturing process thanks to computer aided design systems? This skills development mostly depends on **new technologies** and on a growing demand for **sustainable products and processes.** Give it a chance!

16 PROFESSIONAL OCCUPATIONS IN THE TCLF SECTORS YOU MIGHT NOT KNOW

SECTORAL

CLOTHING CAD
PATTERN MAKER

CLOTHING
MODELLER

TEXTILE
TECHNOLOGIST

EMBROIDERER

LEATHER
TECHNOLOGIST

TEXTILE
COLOURIST

FOOTWEAR 3D
CAD DESIGNER &
PATTERN MAKER

DESIGNER
OF LEATHER
ACCESSORIES

TRANSVERSAL

(DIGITAL)
SUPPLY CHAIN
ANALYST

SUSTAINABILITY
TECHNICIAN

LABORATORY
TECHNICIAN OR
RESEARCHER

INDUSTRIAL
DESIGNER

DIGITAL
MARKETING
PROFESSIONAL

PROCESS &
PRODUCTION
TIMELINE ANALYST

FASHION
COMMUNICATION
MANAGER

INDUSTRIAL
QUALITY
MANAGER



TCLF: HERITAGE EMPOWERED BY INNOVATION

Tradition, experience and a consolidated know-how are the foundations that create innovative and disruptive processes and products. From a strong tradition, innovation flourishes. Did you know the TCLF sectors have been the first to use modern production methods during the first industrial revolution? Did you know that the same happens today?

BE PART OF THE FUTURE!

SUSTAINING THE PLANET

Governments' **green growth policies** and consumers' **demand for sustainability** already guide brands, manufacturers and producers of raw materials to adopt **new sustainable technologies**, production processes and inputs. The growing commitment of the industries about caring for the planet drives many innovations in the TCLF materials as well, and reduces their environmental burden on our planet.

JOIN THE GREEN REVOLUTION!

“*Education is the most powerful weapon that you can use to change the world.*”

Nelson Mandela ”



YOUR FUTURE

IN A SAFE AND THRIVING WORKING ENVIRONMENT

New **production techniques** such as laser cutters, exoskeletons, and sewbots are making the work faster and easier. Additionally to these changes, European employers and trade unions have achieved the **safest labour market regulations** and social protection measures for employees, and are more than ever investing in training and skills development.

GOOD WORK ENVIRONMENT, GOOD JOBS!

WHAT IS BLUEPRINT FOR SECTORAL COOPERATION ON SKILLS?

This brochure is part of a COSME communication campaign of the “Blueprint for sectoral cooperation on skills: showcasing careers in the textile/clothing/leather/footwear sectors”, a European project launched by the Executive Agency for Small and Medium-sized Enterprises (EASME) and the European Commission in line with the New Skills Agenda for Europe, with the aim of boosting employment and employability and overcome gaps, shortages and mismatches between skills offer and demand in the textile/clothing/leather/footwear sectors (TCLF).







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