

# The Evolution of the Fashion Manufacturing Industry in Europe



Skills Smart

TCLF 2030



Iratxe Garcia-Bayona  
Senior Project Officer

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Co-funded by the  
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# EMPLOYMENT IN THE TCLF INDUSTRY IN EU27

in 2020

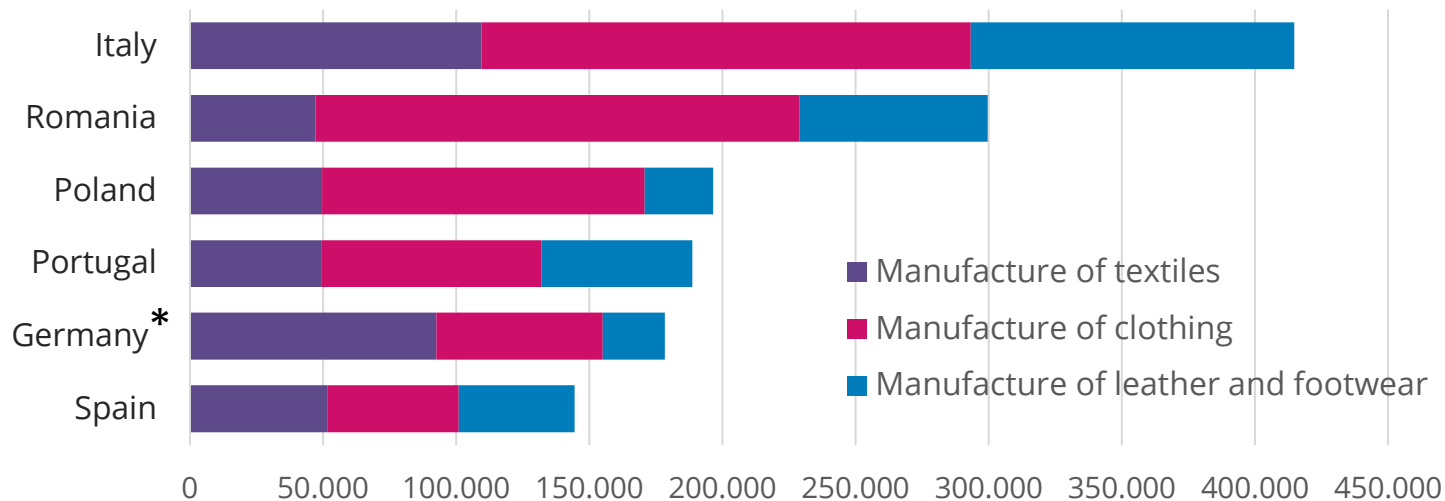
➤ TOTAL NUMBER OF EMPLOYEES IN THE TCLF INDUSTRIES: **2 MLN**

TEXTILE INDUSTRY: **595 100**

CLOTHING INDUSTRY: **976 300**

LEATHER AND FOOTWEAR INDUSTRIES: **437 100**

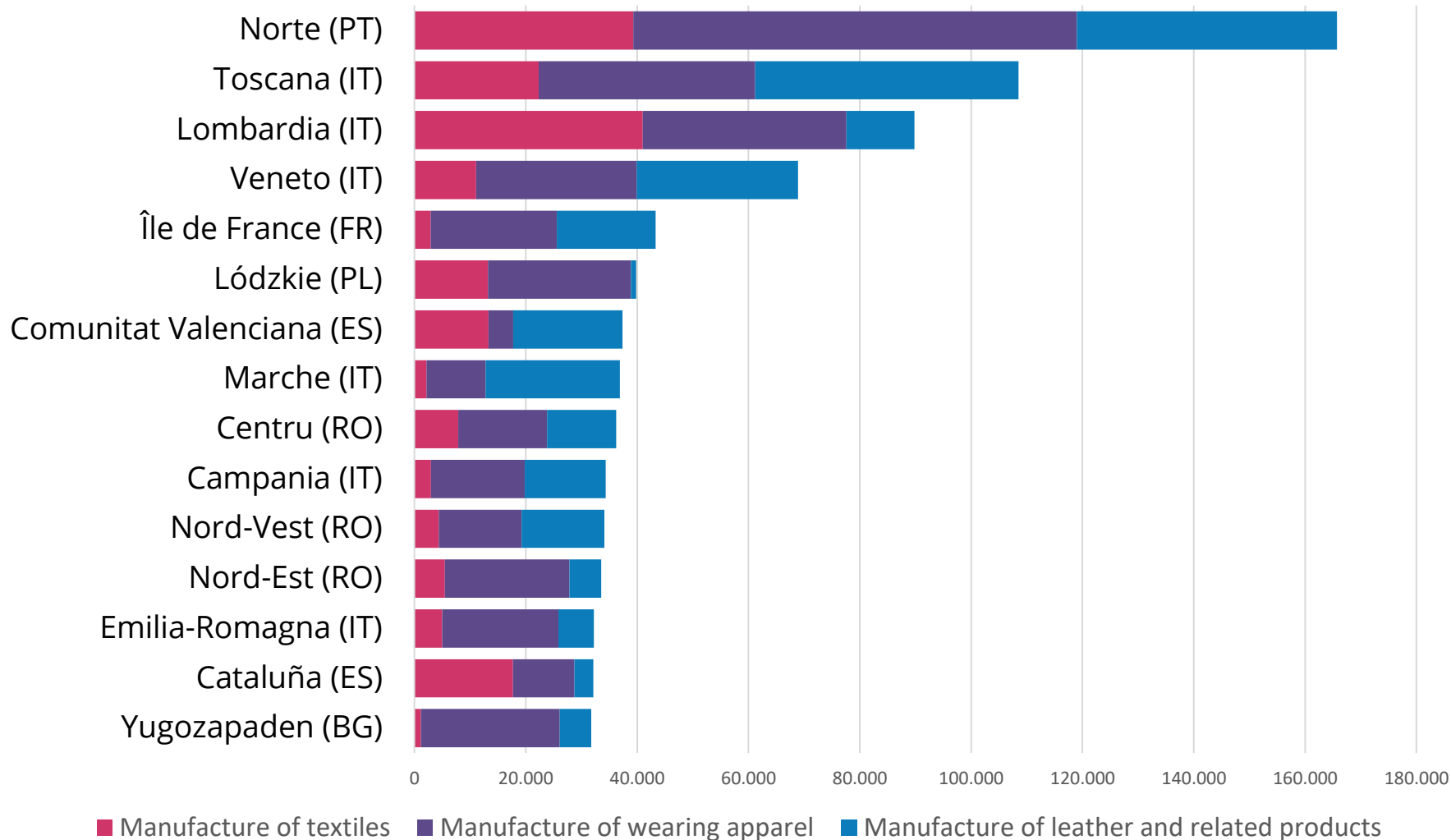
## ➤ TCLF EMPLOYMENT BY TOP 6 EU MEMBER STATES



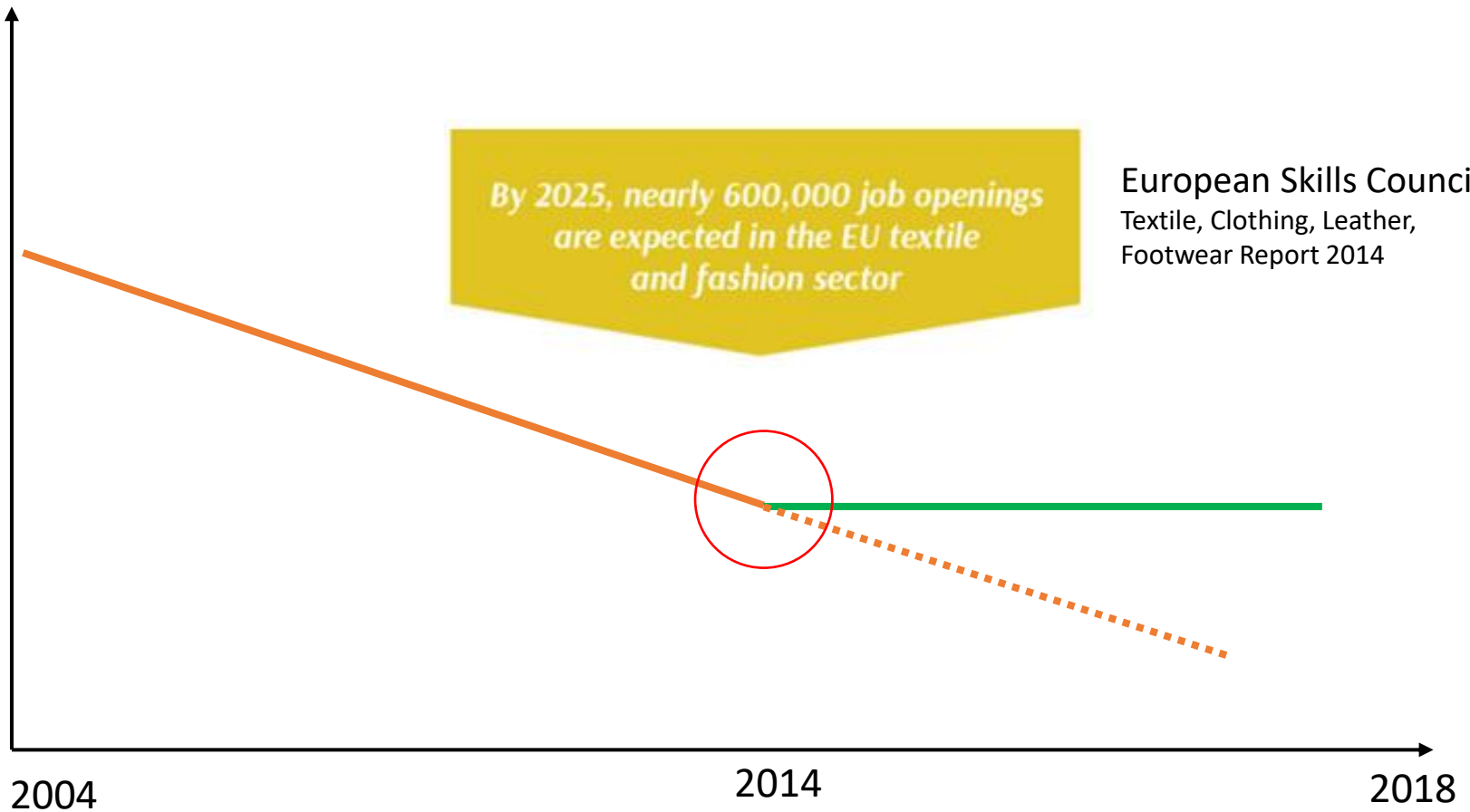
\* Leather & footwear data for 2019

# REGIONAL DISTRIBUTION OF THE EMPLOYMENT

In 2018



# THE TREND BEFORE THE PANDEMIC...



# ...AND NOW

Economic uncertainty + Changes in consumer habits = TCLF hardest hit sectors

Lower demand but certain values reinforced (sustainability, quality, local)

Last quarter of 2021 the production and consumption started recovering (especially in textile)

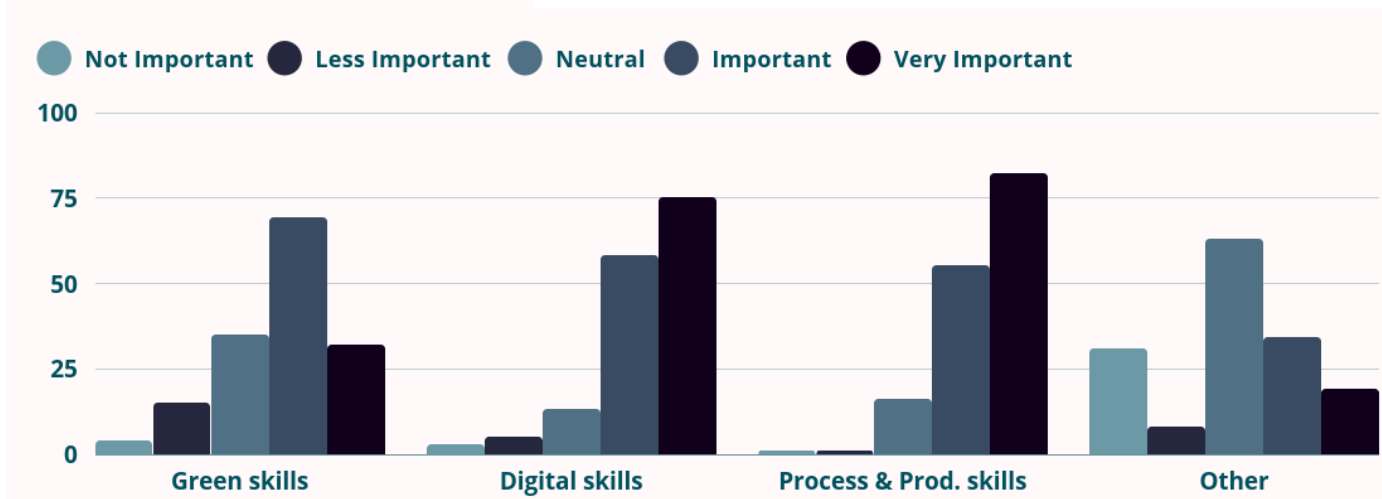
## Digitalisation

Accelerated creation of new business models and attracting new consumers

## Sustainability

Increasingly gaining momentum and becoming economically attractive

## Expected skills needs in a company in next 5 years



*\*Survey carried out among European TCLF companies in the framework of the Pact for Skills initiative in February-March 2021*

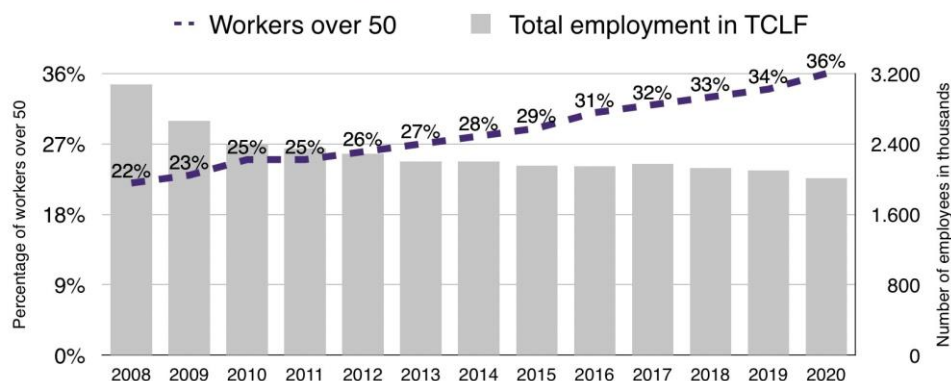


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# THE MAIN CHALLENGES FOR THE TCLF INDUSTRIES

## 1. AGING WORKFORCE

EVOLUTION OF LABOUR FORCE IN TCLF INDUSTRIES AND WORKERS OVER 50 BETWEEN 2008-2019



Source: Eurostat

## 2. SKILLS SUPPLY / DEMAND GAP LEADING TO SKILLS SHORTAGE &

COMPANY SKILLS STRATEGIES

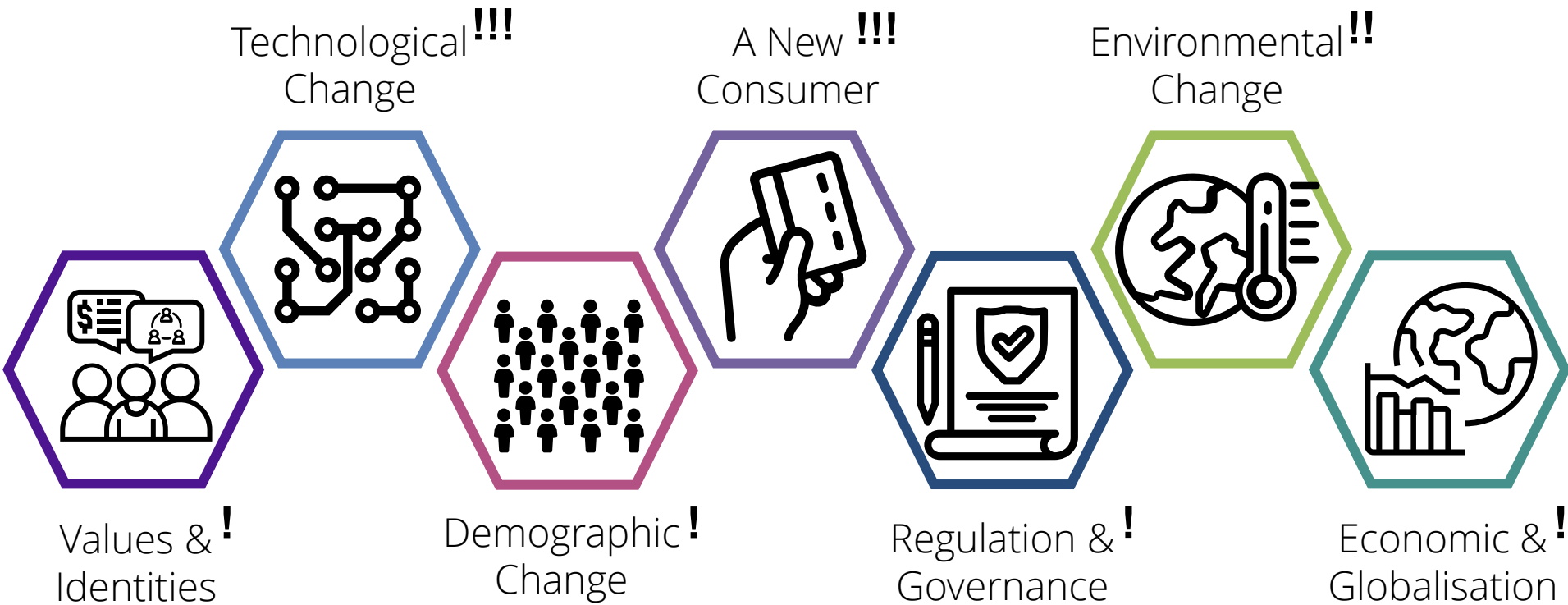


## 3. NEW TRENDS AND DRIVERS OF CHANGE



# DRIVERS OF CHANGE

+ Force of the influence ( ! ) on the sector from the production side based on the results from the S4TCLF survey conducted among 225 companies.

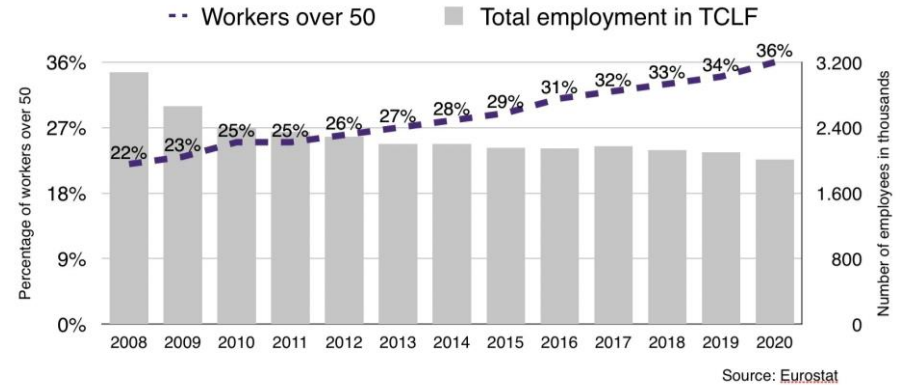


# WHY DO WE NEED A SECTORAL SKILLS STRATEGY?

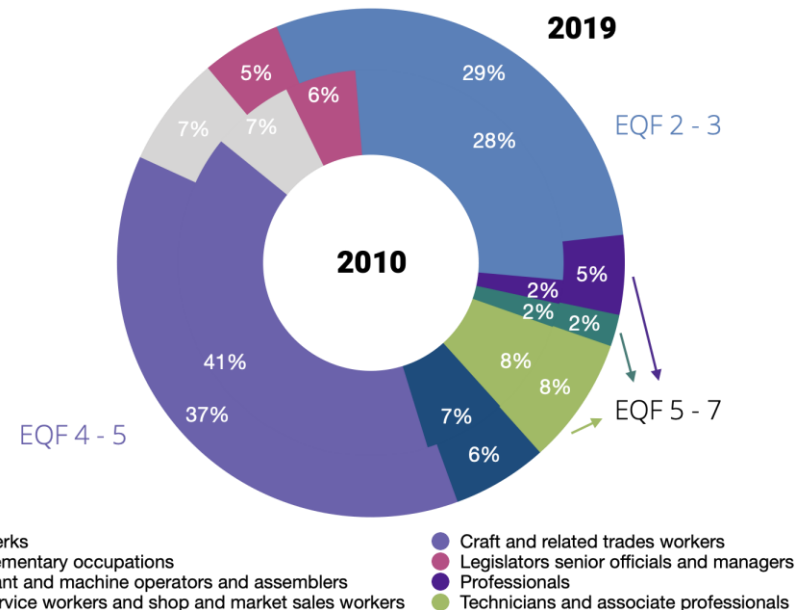
From now until 2030, the TCLF industries will face challenges related to skills gaps, lack of qualified employees and retiring workforce.

According to EURATEX, companies in the 4 sectors will have to hire more than new **600,000 employees** from now until 2030 to fill replacement demand from retirement and to address new skill needs.

## AGEING WORKFORCE



## SKILLS TRENDS





# The Skills4Smart TCLF Blueprint project

## What and who is involved?



# The Skills4Smart TCLF Blueprint project

## What have we done? 3 main objectives & areas of work:

### UPDATE OF CURRICULA & CREATION OF NEW TRAINING MATERIALS

8 profiles &  
MOOCs  
piloted in  
9 countries  
1.750  
participants

### SECTORAL SKILLS STRATEGY

1 EU-wide  
Strategy  
&  
9 national  
versions

### BOOST ATTRACTIVENESS OF THE TCLF

School Days  
Public Events  
Webinars  
Videos  
More...



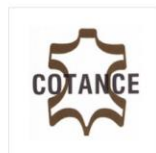
# THANK YOU FOR YOUR ATTENTION

## PROJECT COORDINATOR:



Project contact person:  
Iratxe Garcia-Bayona  
iratxe.garcia@euratex.eu

## PROJECT PARTNERS:



@Skills4TCLF



s4tclfb Blueprint.eu



@Skills4SmartTCLF



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