

Flax/Linen Barometer 2021

**Historic and
early markets:
FRANCE, ITALY,
THE UK & US.**

**Markets with
potential for growth:
CHINA & INDIA.**

**Press kit
June 2021**



**institut
FRANÇAIS
de la
MODE**

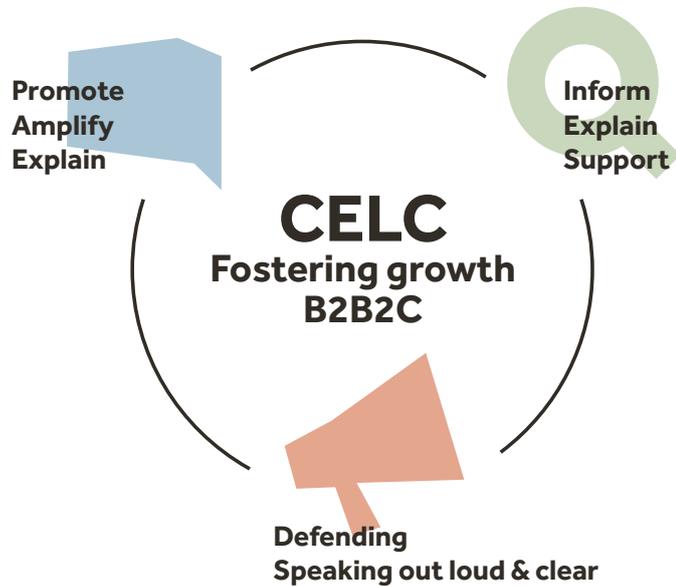
Who we are

CELC

Founded in 1951, we are the only agro-industrial organization that brings together actors from the European linen industry.

10 000 member companies

14 European countries



CELC, a European structuration





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The presence of Flax/Linen

Flax/Linen markets



Linen on the podium SS 21



+ 25%
keyword searches for
"flax" in 2019 & 2020

FENDI - SS 2021



+49%
of designers included
at least 1 model
wearing linen in their
SS21 collection
compared with SS20

JACQUEMUS - SS 2021



64%
of designers at luxury
maisons featured linen
prominently in their
collections in SS21

MAISON MARGIELA - SS 2021



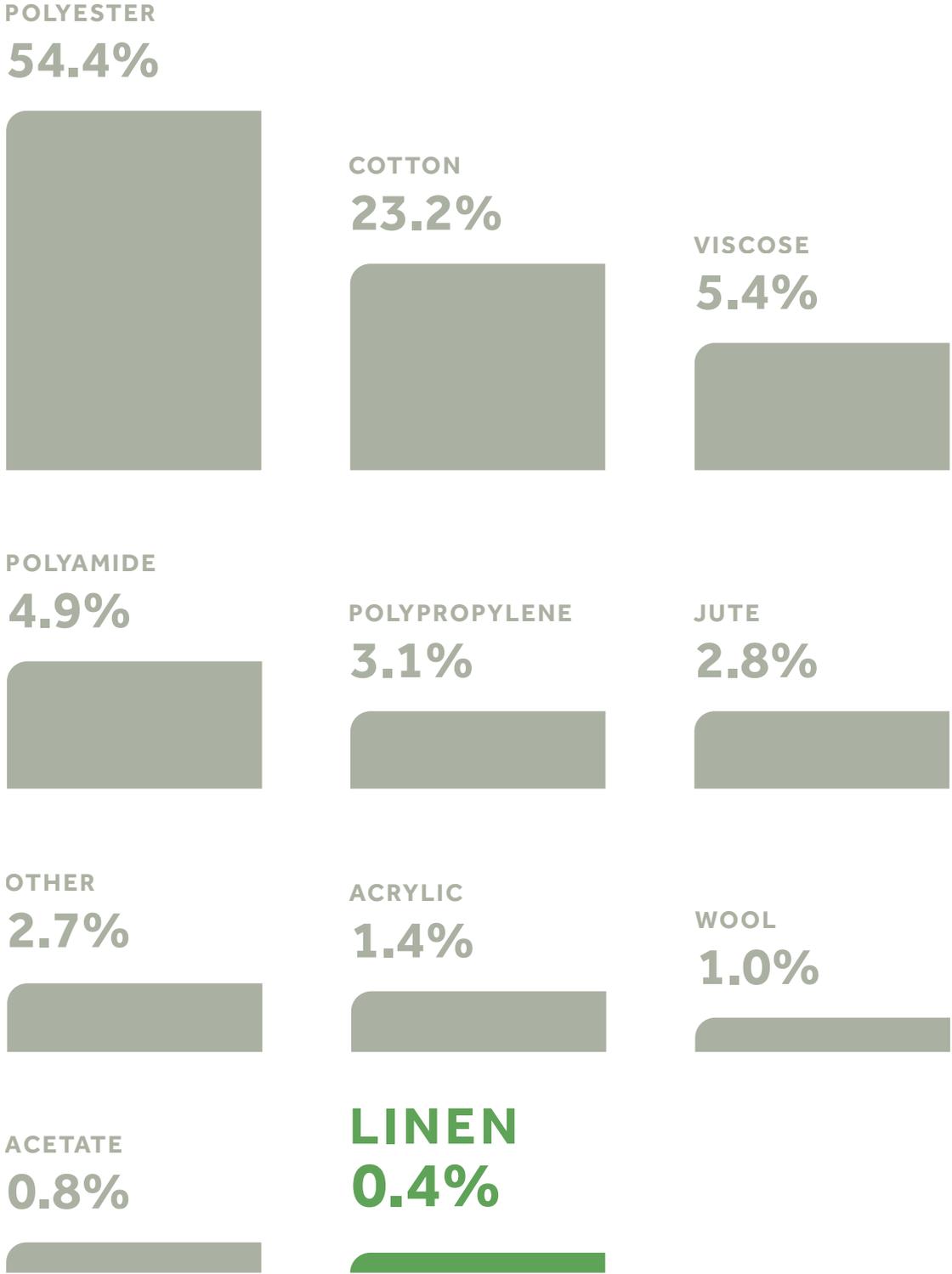
+ 102%
in linen looks in
women's collections
on podiums in SS21
vs SS20

LOUIS VUITTON - SS 2021

Source : Étude Tagwalk X le Lin

The presence of linen

Breakdown by textile fiber in the world



Source: Based on the Fiber year 2020 (figures 2019) and various sources



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Situational context

The Economic Context of Fashion France

The unprecedented economic impact of the 2020 health crisis

Évolution des chiffres d'affaires des distributeurs
Total textile - habillement 2020 / 2019

Source: IFM Panel / *: FEVAD

Markets

MEN'S FASHION	-20.9%
WOMEN'S FASHION	-17.6%
LINGERIE	-10.7%
CHILDREN'S FASHION	-3.6%
HOUSEHOLD LINEN	1.5%
CLOTHING AND TEXTILES	-15.0%

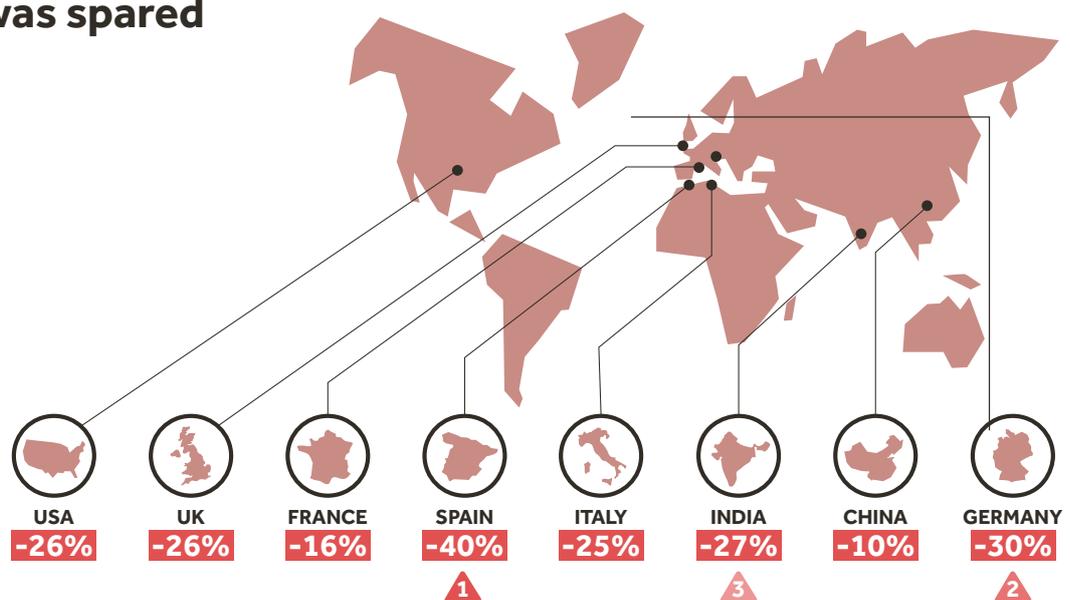
Distribution channels

INDEPENDENT SHOPS	-16.7%
SPECIALIZED CHAINS	-19.8%
LARGE CHAINS	-9.6%
DEPARTMENT STORES	-32.3%
DISTANCE SELLING/E-COMMERCE*	16.1%
HYPERMARKETS	-15.1%

The Economic Context of Fashion Global

No market was spared

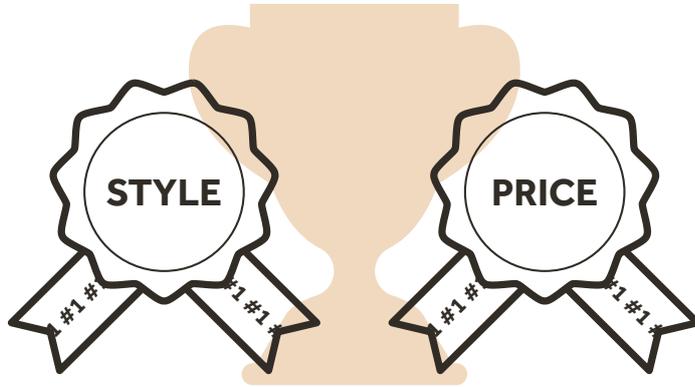
Changes in sales of clothing 2020/2019



Source: NATIONAL ORGANIZATIONS

Forecast for sales in Fashion 2021

Driving forces



In FRANCE,
style is the main
driving force for
buyers.

In the UK and ITALY,
the main factor is
price.



The quality of the fabric
is of greatest
importance in ITALY.

What are the most important factors considered while shopping for clothing?

Can choose 2	FRANCE	ITALY	UK	USA	CHINA	INDIA
Style	42.2%	27.8%	40.9%	33.1%	33.6%	25.1%
Price	40.9%	50.4%	51.1%	45.4%	28.4%	33.2%
Fabric	39.1%	46.7%	18.9%	18.7%	42.3%	40.1%
Comfort	38.1%	44.4%	49.7%	49.4%	66.4%	49.4%
Color	20.1%	10.0%	13.9%	12.8%	9.3%	12.0%
Brand	8.8%	16.0%	14.2%	25.4%	18.3%	36.4%



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Flax Barometer 2021

The Flax/Linen Barometer

Fashion & Deco

Measuring the attractiveness of flax fiber and the purchase intent of the general public in the coming months.



FRANCE



ITALY



UK



USA



*Special focus on affluent & 18-34 youth segments

Summary

Linens purchases in 2021

Linens, a trendy natural plant-based fiber

Linens image & knowledge

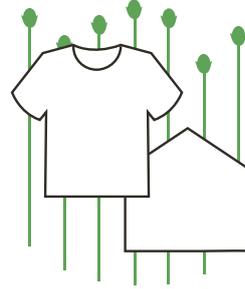
Linens & eco-friendliness

Linens, a fiber with a promising global future

Forecast for linen sales in 2021

Fashion & Deco

The short-term and medium-term forecast is encouraging across all focus groups.



With respect to purchasing linen products, you plan on:

Can choose 2	FRANCE	ITALY	UK	USA	CHINA	INDIA
Buying linen products in the 12 coming months	48.6%	67.4%	48.0%	65.3%	75.2%	82.0%
Buying household or decorative linen in the 2 coming years	45.5%	49.9%	45.6%	49.5%	70.5%	69.3%
Neither	30.0%	13.8%	34.2%	19.0%	7.0%	3.7%

What are the reasons for which you are planning on purchasing a linen product?

Can choose 3	FRANCE	ITALY	UK	USA	CHINA	INDIA
Lightness and comfort	75.8%	75.2%	67.8%	70.7%	66.5%	72.2%
Its freshness	58.6%	78.6%	48.7%	44.0%	57.2%	41.9%
Style of products	45.9%	37.3%	45.4%	44.8%	31.1%	50.0%
Durability	32.9%	30.5%	41.2%	32.1%	40.2%	34.3%
Its relaxed look	25.5%	27.7%	45.9%	46.9%	41.8%	41.4%
Low environmental impact	24.5%	23.0%	16.2%	9.6%	38.4%	11.7%
Its color	18.9%	17.4%	31.3%	27.2%	10.8%	23.3%
It's in style	7.7%	4.7%	7.7%	13.5%	11.8%	17.5%



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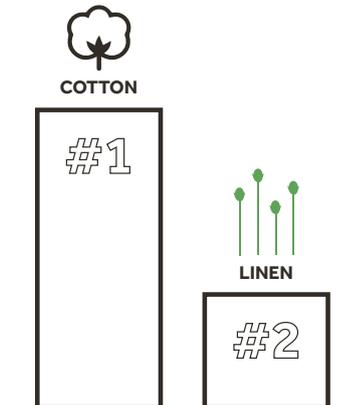
Linen, a trendy natural plant-based material

Linen is in fashion

Ranking of favorite materials

Fashion

In FRANCE and CHINA, linen is the second favorite fabric, second only to cotton*.



In CHINA, 1 out of 5 people name linen as their favorite fabric.

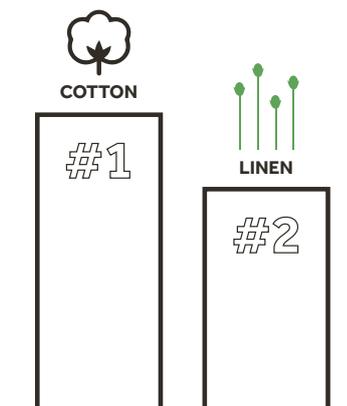


In INDIA, this is the case for 1 out of 10 people.



Deco

Linen is considered the second favorite fabric on all markets and is therefore catching up with cotton*.



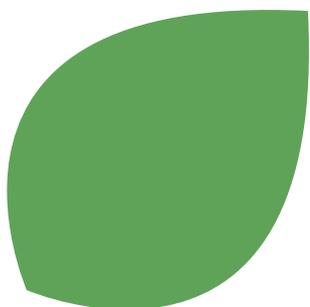
In CHINA, it is the favorite fabric of 1 out of 4 people.



*Must choose 1 out of 11 options

Popular natural fabrics

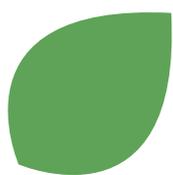
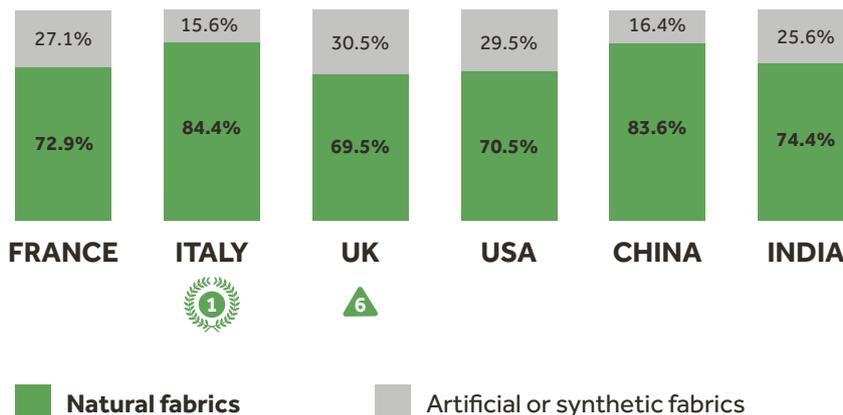
Linen, a plant-based fiber, is having its moment



Fashion

The past several months have led to greater awareness.

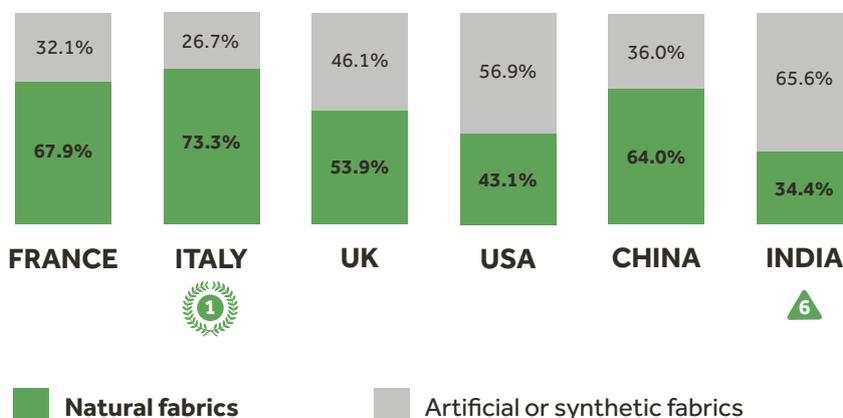
What types of fabric do you plan on purchasing in the coming 12 months?



Deco

We can also see this trend in furniture/home, even though the trend is less clear-cut.

What types of fabric do you plan on purchasing in the coming 12 months?





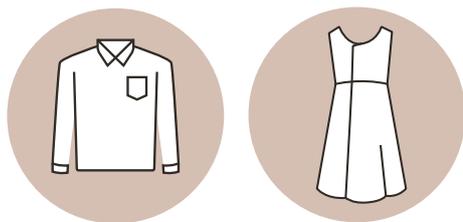
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Image & Knowledge of Linen

Linen image & knowledge

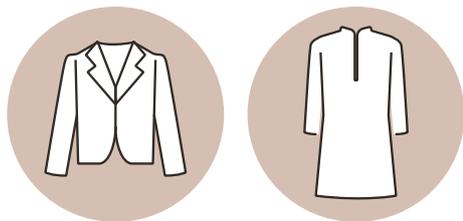
Fashion

If linen were an item of clothing, it would be:



A shirt

A summer dress



A suit

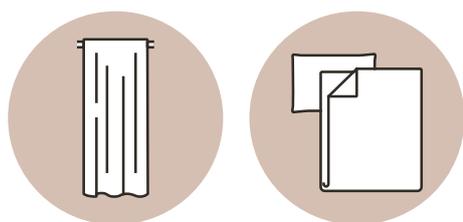
A kurta

	FRANCE	ITALY	UK	USA	CHINA	INDIA
A shirt	30.4%	34.7%	25.8%	24.0%	20.9%	24.7%
A summer dress	24.8%	33.7%	24.0%	23.8%	19.9%	16.9%
Pants	18.2%	12.4%	16.1%	13.6%	15.7%	6.9%
A jacket	11.1%	5.1%	14.8%	12.7%	22.7%	7.1%
A T-shirt	9.9%	5.9%	13.1%	17.8%	16.2%	15.0%
A suit	5.7%	8.2%	6.2%	8.1%	4.7%	12.4%
A kurta*	0.0%	0.0%	0.0%	0.0%	0.0%	17.4%

*Clothing mostly associated with men's fashion

Deco

If linen were a household or decorative textile, it would be:



A curtain

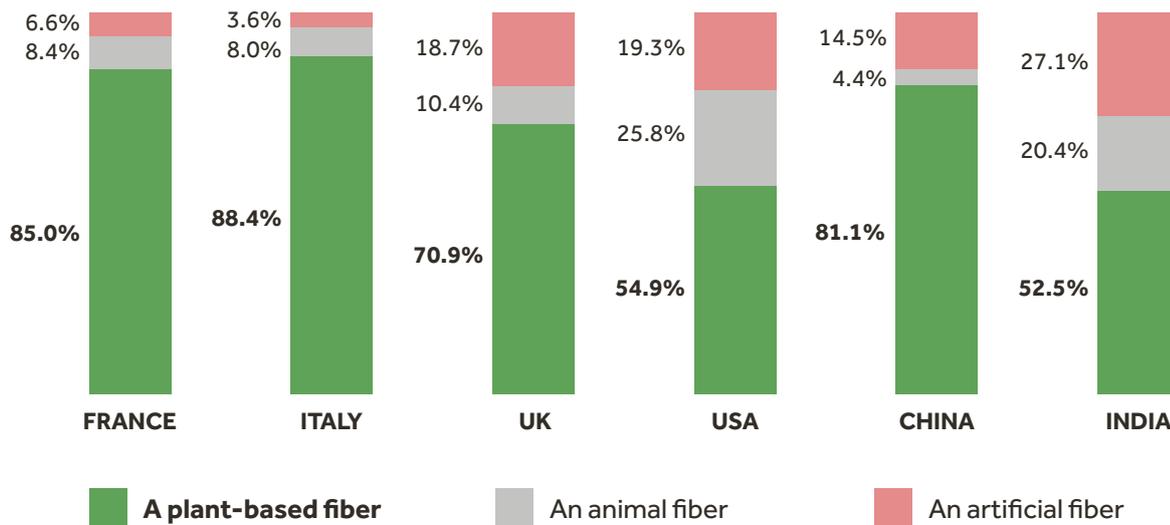
A bedsheet

	FRANCE	ITALY	UK	USA	CHINA	INDIA
A curtain	41.5%	31.8%	28.7%	32.9%	34.5%	45.3%
A bedsheet	39.5%	49.0%	41.2%	31.2%	33.0%	20.7%
A tablecloth	11.8%	13.0%	21.2%	17.9%	8.5%	8.4%
A couch	7.1%	6.2%	8.9%	18.0%	24.1%	25.5%

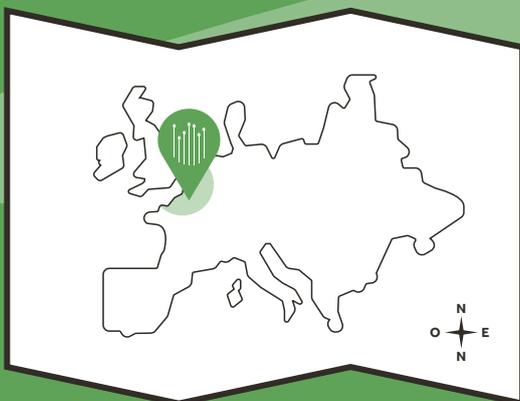
Linen image & knowledge

Italians turned out to be the most informed: they were mostly likely to correctly identify linen as a plant-based fiber, followed by the French, the Chinese, and the Brits.

Is linen a plant-based, animal, or artificial fiber?



Where is flax grown?



Between 61.2% and 84.5% of those surveyed identified Europe as the flax-growing region.

Between 63.6% and 78.4% of those surveyed believe that flax is grown all over the world...

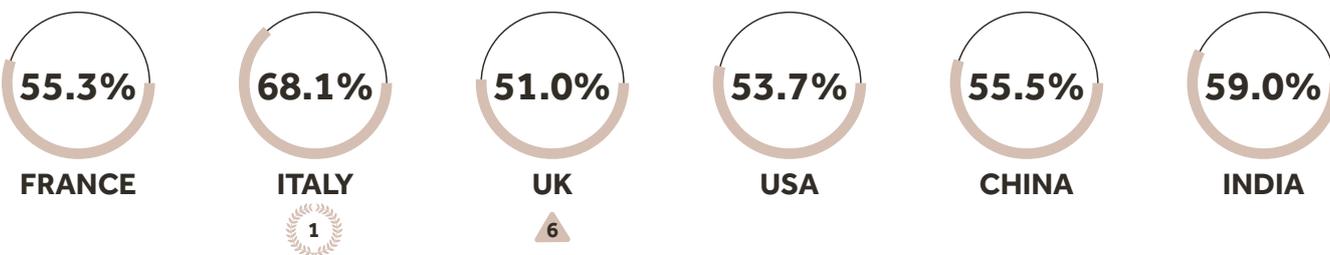
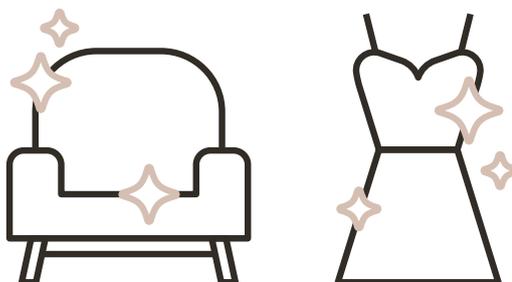
...and 80% of production is based in Western Europe.

Linen image & knowledge

Fashion & Deco

Linen associated with high-end fabric

The six focus groups identified linen as a high-end fabric.



In all focus groups, the higher price of linen compared with other fabrics is justified.





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Consumption & Eco-friendliness

Consumption & Eco-friendliness

Fashion & Deco

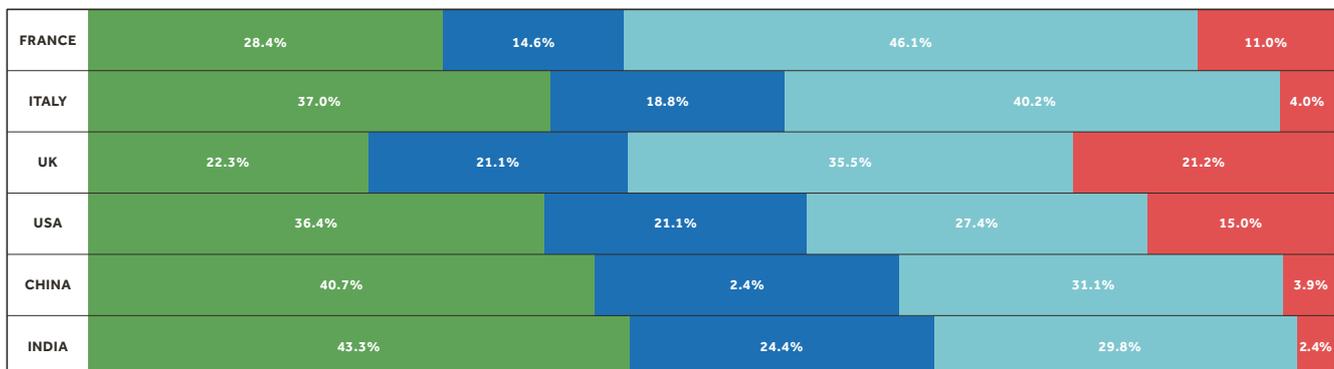
What criteria do you use to purchase an eco-friendly linen product ?

Choose 1	FRANCE	ITALY	UK	USA	CHINA	INDIA
Fabric with a low environmental impact*	35.5%	39.4%	37.4%	32.5%	52.0%	39.3%
Eco-friendly production**	32.5%	40.8%	29.0%	35.7%	41.2%	43.2%
Local production	20.0%	11.5%	22.1%	22.3%	3.9%	9.9%
Socially responsible production	12.0%	8.3%	11.6%	9.4%	2.9%	7.5%

* Use of sustainable materials (organic, recycled, new fibers, etc.)

**Responsible production (pesticide-free, no use of dangerous chemicals during dyeing or other stages)

When you purchase a linen product, would you like to have information on traceability and the respect of labor laws?



■ I would like information about product traceability (production location)

■ I'm interested in both

■ I would like information about the working conditions during production

■ I'm interested in neither

Consumption & Eco-friendliness

A virtuous plant-based fiber



Linen is perceived as a particularly environmentally friendly fabric.

It is in the **TOP 3** in all focus groups.

N°1 in FRANCE, ITALY and CHINA.

Which of the following fabrics are the most environmentally friendly?

Can choose 3	FRANCE	ITALY	UK	USA	CHINA	INDIA
Linen	60.1%	68.2%	51.6%	41.7%	73.1%	51.9%
Cotton	53.0%	63.0%	62.8%	65.1%	71.8%	72.9%
Wool	46.3%	36.9%	54.4%	34.1%	25.0%	36.8%
Hemp	37.2%	44.0%	33.2%	32.5%	28.7%	11.3%
Silk	35.3%	33.6%	26.1%	32.4%	37.6%	42.4%
Cashmere	19.3%	16.2%	18.5%	17.3%	18.5%	11.3%
Leather	12.5%	7.9%	13.9%	18.5%	6.6%	18.5%
Polyester	8.1%	4.9%	11.7%	18.1%	9.0%	14.1%
Polyamide	6.9%	4.1%	5.8%	10.1%	7.7%	11.1%
Viscose	6.5%	8.9%	9.0%	10.1%	5.1%	13.4%
Acrylic	5.8%	5.6%	8.4%	9.4%	6.7%	9.6%



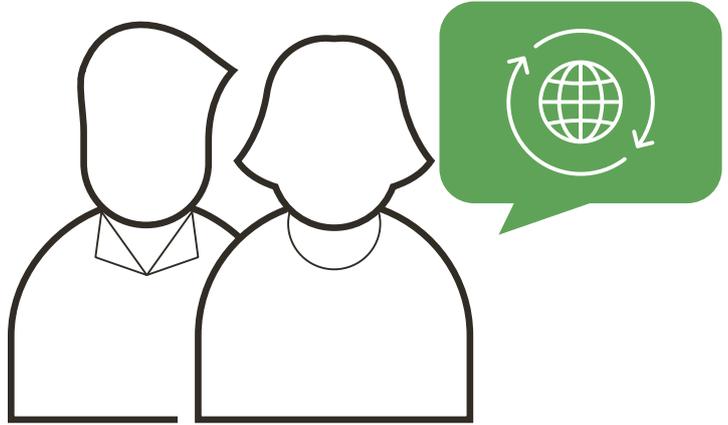
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Linen, a fiber with a promising future

Linen, a desirable fabric

Consumer expectations:

- A product made through environmentally friendly production
- Clear traceability



LINEN IS IN LINE WITH THE FOLLOWING EXPECTATIONS:

Zero irrigation*

Zero waste

Zero GMO

Linen is highly local:

80%
of global production
is based in Western
Europe.

*99.9% CELC sources

European flax, a certified fiber



CELC HAS CREATED EUROPEAN FLAX®

- Traceability guarantee for premium quality linen grown in Western Europe

- Guarantee of environmental and social responsibility

In 2021 – as of June 17 –
439 companies
in 25 countries
have been certified*
+ 277% from January 1, 2020
to June 17, 2021

* By BUREAU VERITAS

Linen, an agriculturally creative fiber

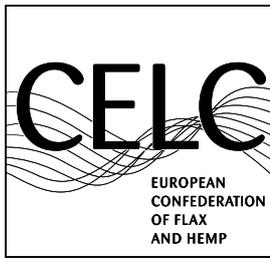


Linen

**A committed
fiber with an
international
impact**

**a plant-based
natural European
fiber that is
emblematic**

**A creative fiber
with a promising
global future!**



About the European Confederation of Flax and Hemp | CELC

Western Europe is the world's largest producer of flax fiber:

France, Belgium, and the Netherlands account for 80% of production! It is the only European agro-industrial organization to bring together and organize all stages of flax and hemp production and processing, encompassing 10,000 companies in 14 European countries; CELC is the leader of a sector of excellence within a globalized context. Its mission is grounded in the innovative and environmentally friendly qualities of its fibers, which are guaranteed by the traceability certificates EUROPEAN FLAX® and MASTERS OF LINEN® and promoted among professionals and consumers through the I LOVE LINEN marketing campaign.

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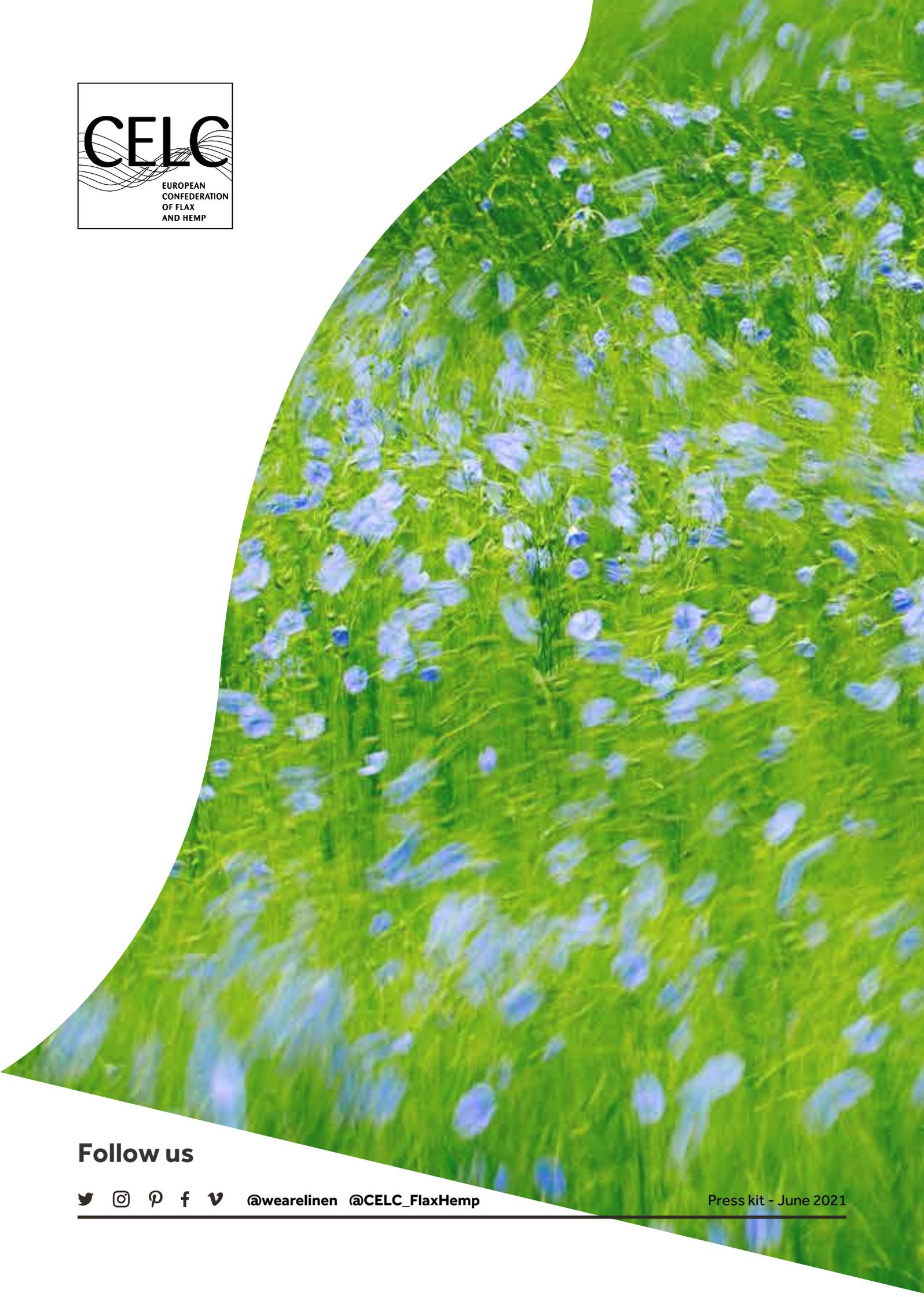
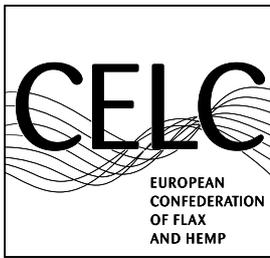
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