

# Scandinavian Clothing Retailers' Global Sourcing Patterns and Practices

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Patterns and Practices**

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Working Paper Subseries on  
Globalisation and Economic  
Restructuring in Africa  
no. xxii

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Center for Udviklingsforskning  
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## Abstract

*This paper is the second in a series of three dealing with EU clothing retail sectors' global sourcing patterns, and the changing sourcing strategies of leading actors. Its focus is on Denmark and Sweden. It provides an overview of the specificities of the Danish and Swedish clothing retail scenes and of the import trades into the two countries. It then presents the results of a survey of 10 leading Scandinavian retailers undertaken in mid-2002. The results cover their sourcing geographies, sourcing channels, the nature of their supply bases, their expectations concerning suppliers and their selection criteria for new countries and new suppliers. A conclusion summarises and discusses the major similarities and differences between the results obtained and those from a similar study undertaken in the UK in 2001. An Appendix present comprehensive clothing import data for the two countries.*

## Introduction

This is the second paper in a series describing sourcing patterns and supplier management policies in different EU clothing retail sectors. As researchers working on issues of economic development, the authors' interest in this question derives from a desire to understand the challenges facing producers and potential producers based in Africa and Asia. Because the 'global clothing market' is highly segmented by size, consumption trends and retail structures, we believe that the question of specifying the preconditions for the 'global competitiveness' of industries in these countries needs to be narrowed down to questions such as the preconditions for successful participation in specific end-markets.

The paper examines how global sourcing for clothing operates in two of the three Scandinavian end-markets, Denmark and Sweden.<sup>1</sup> It does so on two main bases. The first is unpublished Danish and Swedish import data for the period 1990-2001. The second is a series of interviews conducted with 10 leading Scandinavian retailers and wholesalers in mid-2002. An additional important source has been company Annual Reports, both the published ones of publicly listed companies and the unpublished ones of private companies, accessible through payment of a fee to national company registers.

The paper covers, in turn:

- the specific features of the Danish and Swedish clothing retail markets,
- the sourcing geographies of the Scandinavian market generally and of the companies interviewed in particular, as well as the reasons for these geographies

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<sup>1</sup> Norway was not considered in this study as it is not a EU member.

- the main types of suppliers into the Scandinavian market
- the size and structures of Scandinavian retailers' supply bases
- Scandinavian retailers' expectations of suppliers and supplier management policies and instruments, and
- How retailers chose new suppliers.

The paper concludes with a discussion of the implications of the evidence presented here for suppliers in developing countries.

There are two appendices. The first provides a full, highly detailed, version of national import statistics for Denmark and Sweden to complement the short summaries found in the main text.

The second covers importers' views of the strengths and weaknesses of producers in three countries where producer surveys have been conducted as a counterpart to this study – Mauritius, Vietnam and South Africa (although in practice none of these countries proved to have significant levels of export into Scandinavia).

### The Scandinavian clothing retail market

In 2000 the size of the Danish clothing market was 16.9 bn. DKK (Eu. 2.26 bn.), while Sweden's was worth 44.6 bn. SEK (Eu. 5.28 bn.). Annual per capita expenditure on clothing is considerably higher in Sweden than in Denmark (Eu. 595.5 as against Eu. 425.3 in 2000). This difference increased significantly during the second half of the 1990s as the markets grew at different rates. The Danish market grew by only 0.32%/year from 1995/96 to 1999/2000, implying a contraction in real terms. By contrast the Swedish market, which had contracted severely in the early 1990s as the country experienced a serious recession, grew at a rate of 4.5%/year over the same period (all data from Consumer Europe (Euromonitor 2001)).<sup>2</sup>

#### Denmark

The Danish clothing retail sector has several distinguishing features. Firstly, it is extremely export oriented – a factor which makes it somewhat meaningless to discuss market shares on the basis of domestic markets alone. Total exports are almost as high as domestic market sales

<sup>2</sup> The Danish and Swedish national statistical services, Danmarks Statistik and Statistiska Centralbyrå give different data. That for Sweden is almost identical to Consumer Europe's, but that for Denmark gives a market size of around 24-25 bn. DKK. It is not clear how the latter difference arises. Consumer Europe's data has been used here since they are presumably calculated in the same way for both countries.

(see below) and a large majority of the sales of all the four largest clothing retail groups in Denmark are exports. The Danish market is simply too small for the realisation of the economies of scale that are so important in the mid-market clothing retail business. Exports are very largely in a wholesale form, reflecting the background of some important players in manufacture or in operation as trading houses/converters (see below). Of the leading 10 players only IC Companys and Sand operate stores in foreign markets.

Secondly, the market is very highly concentrated, even if Danish exports and domestic sales are considered jointly. The top five groups account for 43.7% of total sales measured in this way, while the top 10 almost certainly account for more than 60%. The comparable figures for the UK are 39% and 52% respectively.<sup>3</sup> Apart from the workwear supplier Kansas, the four leading Danish retailers have a large number of brands or branded chains targeted across the range of market segments.

Thirdly, despite the strong tendency towards concentration, independents still play an important role in the Danish market. Many chains predominantly comprise franchises, while a number of others are constituted entirely on a 'voluntary' basis. That is, stores are individually owned but share a common chain name, buying and marketing function. There are also a large number of 'stand alone' individually owned stores that buy in a range of labels from different leading players.

Fourthly, apart from the Swedish Hennes & Mauritz, no major foreign-owned chain has gained a significant foothold in the Danish market. Gap withdrew from the market entirely after a brief foray in the 1990s, while Esprit, Zara and Mango have only token presences. Moreover, a great majority of Danish-owned players, including the leading ones, are privately owned. Only two clothing wholesalers or retailers, IC Companys and Magasin's parent company Wessel & Vett, are listed on the Copenhagen Stock Exchange.

<sup>3</sup> In the UK case excluding exports, which in this case are mainly accounted for by trading houses and manufacturers rather than retailers.

**Table I: Clothing sales (including exports) of top 10 Denmark-based retailers by rank order, ca. 2001**

Company	Date	Sales (bn. DKK)	Notes
Bestseller	2001	3.43	Own branded mid- and lower-mid chains (mostly franchised) include Bestseller, Vero Moda, Only, Jack & Jones, Exit, TDK, Selected; around 50% of sales are wholesale. These include exports to independents.
IC Companys	2001	3.15	Formed in 2001 as a result of fusion of mid-market firms InWear and Carly Gry. Own brands include Jackpot, InWear, Part Two, Matinique, Peak Performance and Cottonfield; around 60% of the business is wholesale, including exports (including to independents)
Kansas	2001	2.70	Workwear; includes exports
Brandtex	2000	2.48	Own mid- and lower-mid market chains and brands include 4-You, B-Young, Blend, Fransa, Signature, Cero, Etage, Jensen Women, Silbor, Wiki, Atmosphere and Kabooki; brands are sold wholesale also and up to 75% of sales of some brands are exports. Re-branding of group under name Share planned for 2002/03.
Hennes & Mauritz	2001	1.82	
Din Tøjmand	1999	1.80 (estimate)	Voluntary chain. No turnover figures published
Magasin	2001	1.48	Department store group. Calculated as 50.2% of turnover
Tøjexperten	1999	1.30 (estimate)	Voluntary chain. No turnover figures published
Sand	2001	1.00 (estimate)	Upper mid-market brand. No official turnover figures given. Large majority of sales exported
Dansk Supermarked (DS)	2000	?	Clothing represents an unknown share of total group turnover of 19.27bn DKK. DS comprises three major super/hypermarket groups, Netto, Føtex and Bilka (of which Føtex and Bilka sell clothes) plus a discount clothing chain, Tøj & Sko.

Source: Company annual accounts; interviews; business press. 1999 data on Din Tøjmand and Tøjexperten from ECRH (2001).

Fifthly, recent levels of profitability appear to be rather low and in a number of cases negative. One major player (IC Companys) recorded a loss in 2001, while another (Magasin<sup>4</sup>) has forecast losses for 2002. Three other important players outside the top 10 (Bruuns Bazaar, Jørgen & Jørgine and RedGreen) also recorded losses in their last accounts.

### Sweden

Unlike in Denmark, Swedish clothing retailers tend to be retail specialists without wholesaling operations overseas. Four of the leading 10 (notably Hennes & Mauritz) have large overseas sales, but these are through their own stores rather than on a wholesale basis. This pattern is in the process of being repeated by a fifth, Stadium.

**Table II: Clothing sales (excluding exports) of top 10 Swedish-based clothing retailers in rank order**

Company	Year	Sales (bn. SEK)	Notes
Hennes & Mauritz	2001	5.43	Sales in other markets worth further 41.1 bn. SEK in 2001
Lindex	2001	2.68	Mid-market chain. Sales in other markets worth further 2.3 bn. SEK in 2001
KappAhl	2000	1.98	Mid-market chain. Sales in other markets worth 1.94 bn. SEK in 2000
Stadium	2001	1.8 (estimate)	Swedish-owned sportswear chain. Clothing sales estimated at 70% of total sales worth 2.6 bn.
Densam Fashion Group	2000	1.49	Voluntary chain
JC	2000	1.29	Until recently a voluntary chain. Still only 20% of Swedish sales through own stores. Sales in other markets worth further 0.37 bn. SEK in 2000
Ählens	2001	1.24 (estimate)	Department store chain. Calculated as 33% of total sales of 3.72 bn. SEK
Ge-Kås	2001	1.0	Stand-alone discount hypermarket. Clothing accounted for 55% of total sales of 1.8 bn. SEK
Dressman	2000	0.87	Rapidly expanding Norwegian-owned discount group
MQ	2000	0.80	Voluntary chain

Source: Company annual reports and accounts; interviews

<sup>4</sup> Magasin's business is wider than clothing, however. See Table 1.

The Swedish market is significantly less concentrated than the Danish and the UK ones. The top five retailers account for 31% of all sales, while the top 10 account for around 42%. As in Denmark, independents retain a substantial market share, many of them being supplied by Danish wholesalers (see below). Again as in Denmark, voluntary chains retain a substantial market share, although what had been the second largest of these (JC) converted itself to a publicly listed company in 2000.

While the most prominent example of Swedish clothing retailer expansion overseas has been organic, most other Swedish companies with significant overseas sales have acquired stores outside the country through mergers and acquisitions. Lindex expanded into Germany on this basis, as did KappAhl into Denmark (buying the MacCoy chain) and Norway. The largest single number of mergers and acquisitions undertaken was by a company laying just outside the top 10, the workwear supplier New Wave, which made five overseas acquisitions in 2001 alone. Mergers and acquisitions are also a feature of the internal Swedish scene, with Lindex's recent takeover of Twilfit and the merger of Polarn O. Pyret and Portwear into the Retail and Brands (RNB) group. Relatedly, stock market membership is a much more pronounced trend in Sweden than in Denmark, with six clothing suppliers or retailers listed on the Stockholm Stock Exchange (Lindex, Hennes & Mauritz, Fenix Outdoor (Fjällraven), JC, New Wave and RNB).

As in Denmark, where apart from Hennes & Mauritz only KappAhl (also Swedish) has a significant market presence, foreign players presence in Sweden is generally marginal. The only foreign group with a significant market share in Sweden is the Norwegian Dressman Group. The main factor constraining foreign presence in both markets is high employee costs - the sectors are unionised in both countries.

Swedish clothing retailers appear to be generally more profitable than their Danish counterparts. None of the leading 15 or so has posted losses in the last two years.

## Clothing imports<sup>5</sup>

### Overall import values, penetration and geography

In Denmark clothing import values for 2000 (Eu 2.25 bn.) virtually equalled the value of domestic market sales (Eu. 2.26 bn). Despite domestic production worth Eu. 0.79 (Eurostat 2002b), import penetration<sup>6</sup> was technically well in excess of 100%. This is explicable in terms of very high levels of re-exports (total Danish clothing exports in 2000 were worth Eu.

<sup>5</sup> Except where indicated, all data in this section is drawn from the Eurostat (2002a) data base.

<sup>6</sup> Calculated as imports as a share of (domestic production - exports) + imports.

1.80 bn). In Sweden, clothing import values in 2000 were (at Eu. 2.12 bn.), actually lower than in Denmark despite the much larger Swedish market. But, since Swedish domestic production is negligible (op. cit.),<sup>7</sup> import penetration was also technically well in excess of 100%.

Very high or total import penetration for clothing is a long established trend in Sweden, but one dating only from the 1990s in Denmark. While Swedish imports grew very unevenly and slowly during the 1990s, Danish ones almost tripled between 1990 and 2000 (cf. Table III). The Danish clothing industry's decline occurred much later and was associated with at least some manufacturers moving into importing/re-exporting functions in Denmark, and/or re-establishing their factories in Eastern Europe (for example, first Poland, later the Baltic countries and most recently Ukraine), rather than simply withdrawing from the sector.

Table III summarises the changing patterns of the main sources of imports to the Danish and Swedish markets since 1990. A number of conclusions are suggested:

- Western and Southern Europe remain the largest single region of origin for imports in both cases, although its share has declined considerably (very considerably in the Swedish case). However, a considerable proportion of these imports are almost certainly re-exports. For example, the Netherlands, Belgium, Sweden and Austria, none of which have significant clothing industries, together contributed 12.0% of Danish imports in 2001. Netherlands and Belgium together contributed 4.6% of Swedish imports the same year, while Denmark alone contributed no less than 13.2%.<sup>8</sup>
- Central and Eastern Europe grew steadily in importance for both countries
- Turkey and Tunisia also grew steadily in importance for both countries
- India and Bangladesh grew in importance rapidly until 1995, but since then their import share has stabilised
- by 2000, import shares from leading Far Eastern destinations were roughly similar for Denmark and Sweden, but Sweden had a much higher proportion passing through Hong Kong and Macau.<sup>9</sup>
- the import patterns of the two countries have tended to converge over time

<sup>7</sup> In 2000 the value of Swedish domestic production was only Eu. 0.17 bn. Swedish exports totalled Eu. 0.55 bn.

<sup>8</sup> Denmark's share of Swedish imports in 2001 exceeded 18% for four categories of clothing: women's trousers (18.4%), dresses (18.4%), skirts (21.3%) and blouses (24.2%). These categories were exactly the same as those for which the joint share of Danish imports from Poland and Lithuania were highest (at 17.2%, 19.2%, 19.9% and 35.2% respectively). This suggests that re-exports of goods originating in Poland and Lithuania accounts for a high proportion of Danish re-exports to Sweden.

<sup>9</sup> Swedish imports from China rose from 4.9% of all imports in 1990 to 18.3% in 1995, before falling to 14.8% in 2000 and 15.1% in 2001. This fall is widely attributed to Sweden's accession in 1995 to the EU - and thereby also to the EU's quota system.



**Table III: Value and origin of clothing imports by share (%) of total import value, Sweden and Denmark, 1990-2001**

	1990		1995		2000		2001	
	Denmark	Sweden	Denmark	Sweden	Denmark	Sweden	Denmark	Sweden
Total value (Eu. bn.)	0.87	1.79	1.44	1.50	2.25	2.12	2.31	1.97
West & Southern Europe (%)	46.6	62.4	44.0	44.9	36.0	39.4	36.0	38.6
Central & Eastern Europe (%)	4.7	1.0	10.8	6.2	14.8	9.3	15.5	10.8
Turkey & Mediterranean(%)	5.5	1.4	3.3	1.8	4.9	5.0	6.6	5.5
Indian sub-continent (%)	3.6	2.8	6.0	5.8	5.9	5.8	6.1	7.7
China, Thailand, Indonesia, Malaysia (%)	21.0	7.6	16.0	20.6	22.4	16.5	21.4	16.8
Hong Kong, Macau, South Korea (%)	9.9	11.2	8.4	10.5	6.5	10.2	5.3	8.0
Other (%)	8.7	13.6	11.5	10.2	9.5	12.2	9.1	12.6

Relative to UK imports in 2000 (reported in Gibbon, 2001) both Denmark and Sweden imported much larger proportions of total intake from or through other EU countries (36-39% of all imports, as opposed to 28%), as well as from Central and Eastern Europe (9-15%, as opposed to less than 5%). Shares of imports coming from China, Thailand, Indonesia and Malaysia, as well as from Hong Kong, Macau and South Korea, were roughly comparable to the UK case. On the other hand, Turkey and the southern Mediterranean countries, as well as the Indian sub-continent were far more important import sources for the UK than for Scandinavia. Each accounted for roughly double the proportions of intake into the UK market, relative to the Danish and Swedish ones.

### Product categories

In Denmark the leading product categories of clothing imports by value in 2000 were (in rank order) pullovers, women's trousers, men's trousers, t-shirts and women's blouses. In Sweden they were pullovers, men's trousers, women's trousers, t-shirts and women's underwear. These lists closely resemble leading UK import categories, except that men's shirts are the third leading UK import category and neither women's underwear nor blouses feature in the UK top five. Table IV compares the main import sources for common Danish, Swedish and UK leading import categories in 1990 and 2000.

**Table IV: Value (Eu. mn.) and leading origins (% share of total) of main clothing import categories, Denmark, Sweden and UK, 1990 and 2000**

	Denmark		Sweden		UK	
	1990	2000	1990	2000	1990	2000
<b>PULLOVERS</b>						
value	79	317	215	254	602	1679
Lead origins	Portugal 29.4	China 8.8	Denmark 19.4	Denmark 16.2	H Kong 17.3	H Kong 11.2
	Italy 10.8	Italy 8.7	Portugal 13.9	China 8.9	Italy 15.8	China 6.9
	H Kong 8.6	Poland 8.4	Italy 13.5	Turkey 6.8	S Korea 8.0	S Lanka 5.8
	Germany 8.3	Turkey 8.3	H Kong 12.2	H Kong 6.4	Portugal 6.2	Italy 5.3
<b>WOMEN'S TROUSERS</b>						
value	89	266	221	229	343	1343
Lead origins	Italy 16.0	Italy 13.0	UK 24.2	Denmark 18.3	H Kong 18.2	Turkey 11.8
	H Kong 10.2	China 10.9	Denmark 11.9	Turkey 9.2	China 10.4	H Kong 10.0
	UK 9.4	Poland 10.8	Portugal 11.0	H Kong 9.2	Germany 6.8	China 9.9
	Portugal 9.4	Turkey 8.5	Italy 10.4	China 8.2	Italy 6.0	Morocco 7.3
<b>MEN'S TROUSERS</b>						
value	80	182	151	240	476	1155
Lead origins	UK 18.2	Italy 17.3	Portugal 31.1	Portugal 13.7	H Kong 24.1	Morocco 10.8
	Italy 16.2	Portugal 9.6	Italy 12.1	Italy 11.2	Belgium 9.3	H Kong 8.1
	Portugal 14.5	Germany 9.1	H Kong 9.9	Belgium 8.5	Portugal 8.9	Belgium 7.5
	H Kong 13.4	Sweden 8.7	Finland 5.7	Denmark 7.6	Ireland 8.3	China 5.2
<b>T-SHIRTS</b>						
value	52	214	110	228	330	1024
Lead origins	Portugal 26.5	B'desh 14.4	Greece 19.8	Denmark 16.2	Greece 11.3	Turkey 17.5
	Greece 8.7	Turkey 10.9	Portugal 19.7	Turkey 13.5	Portugal 11.1	B'desh 9.3
	B'desh 8.6	China 9.4	Denmark 8.9	B'desh 12.3	Ireland 10.2	H Kong 8.6
	Germany 8.3	Portugal 7.8	Turkey 6.4	Greece 11.1	Turkey 9.1	China 6.8

In the case of most items, all three countries demonstrate a shift away from western and southern European origins and toward the Far East (and Bangladesh in the case of t-shirts) on the one hand and Mediterranean countries (chiefly Turkey) on the other. For Denmark there is also a shift in some cases to central and eastern Europe. Sweden's heavy and apparently increasing use of Denmark as an import source almost certainly refers to re-exports, probably mainly from Poland and Lithuania (see footnote 8 above). Imports of men's trousers represent a special case. While sourcing of this category has undergone the same geographical shift as for clothing generally in the UK, Italy and Portugal represent the main origins in Scandinavia. This applies especially to jeanswear.

### Interview data on sourcing geography

#### Sample and research technique

Between May and August 2002 a series of discussions were conducted with Scandinavian clothing retailers/wholesalers. A sample of around 20 companies was constructed in which Danish and Swedish chain stores of different sizes, as well as department stores,

super/hypermarkets and workwear distributors were represented. Interviews were conducted with the first 10 of these that agreed to be interviewed. Of this 10, seven were chains or groups of chains of various sizes, a number of which were also wholesalers; two were super/hypermarkets; and one was a department store. The 10 comprised six Danish and four Swedish companies. The great majority of the companies interviewed were large or very large by Scandinavian standards. At the same time it should be underlined that there is no correspondence between the lists of companies appearing in Tables I and II and those interviewed.

Interviews, all but one of which was held in Danish or Swedish, covered the background of the enterprise concerned and the topics which will be described below. In all cases they were with the persons within the company concerned who was ultimately responsible for sourcing issues. These persons, and the companies they represented, were guaranteed anonymity.

### Respondents' sourcing geographies

Table V describes respondent' answers to a question concerning the geography of their total intakes in 2001. Besides the answers from the 10 respondents it includes details on an 11<sup>th</sup> non-interviewed company, whose current sourcing geography is reported in its 2001 Annual Report.

**Table V: Respondents' sourcing geographies (n respondents=10; usable information for one other retailer)**

	0-9%	10-19%	20-29%	30-39%	40-49%	50-59%	60-69%	70-79%	80%+	Not stated
% from Far East and Indian sub-continent					3	2	2	2	2	0
% from Far East				2	3					6
% from Indian sub-continent	1	2		1	1					6
% from 'Greater Europe'		1	2	2	2	4				0
% from EU and Turkey		1	1		1					8
% from central and eastern Europe	1	1		1						8

Source: own interviews; Annual Report for one company not interviewed

In relation to the import data reported in Table III, respondents were on average sourcing more clothing from the Far East and less from 'Greater Europe'<sup>10</sup> than Danish and Swedish enterprises as a whole. Whereas the latter were sourcing 55-58% of their intake from 'Greater Europe', less than half the sample sourced more than 50% from this origin. Four of the five

<sup>10</sup> Normally EU retailers use the term 'Greater Europe' to refer to the EU plus central and eastern Europe, Turkey and the southern Mediterranean. In the Scandinavian case however imports from the southern Mediterranean were very low and the expression did not embrace these countries.

sampled companies who provided details for the breakdown of origins within the Far East and Indian sub-continent were sourcing more than 10% of their intake from the Indian sub-continent, while for Danish and Swedish imports generally the figure was 6-8%. Similarly, a majority of those giving data on sourcing from the Far East alone were sourcing over 40% from this origin, as against 32-33% for Danish and Swedish imports generally. Considerably higher levels of sourcing from the Far East than suggested by national statistics were also reported by UK firms interviewed in an earlier, parallel study (Gibbon op. cit.). In both this case and the one currently examined, it is probable that company size was a determining factor. The large companies making up a big majority of firms sampled in both surveys were presumably more likely to possess the resources, financial and otherwise, necessary for successful sourcing (particularly direct sourcing) in Asia.<sup>11</sup>

### Recent changes in sourcing geography and its determinants

Nine of the 10 companies interviewed described at least one significant change in their sourcing geography within the previous five years. These are summarised in Table VI.

**Table VI: Direction of movement in sourcing geography 1996-2001 (n respondents=9)**

'Further out' ('Greater Europe' to Asia, within Asia, or within 'Greater Europe')	3
'Closer to home' (Asia to 'Greater Europe')	2
'Further out' and 'Closer to home'	4

Source: own interviews

As in the case of the UK (Gibbon op. cit.), there was no unambiguous trend toward sourcing 'closer to home', as might be suggested by arguments referring to the increasing importance of shorter lead times and making the assumption that this entails using a more localised supplier base. Firstly, factors other than lead times - especially price - were also of importance. Interviewees acknowledging that price was becoming more important for them generally linked this to sourcing more from cheaper Asian origins, notably China, India and Bangladesh, and less from ones in 'Greater Europe' or even more expensive Asian origins like Hong Kong.<sup>12</sup> Within 'Greater Europe' itself, price was also pushing sourcing towards Lithuania, Romania and Bulgaria. Secondly, where sourcing was coming nearer to home not only lead times, but also supply security, the high cost of the dollar, greater levels of volume-related flexibility in Europe and buyers' own increasing ability to understand minute time calculations<sup>13</sup> were all mentioned as factors alongside lead times in influencing the shift.

<sup>11</sup> Smaller companies everywhere tend to make more use of importers because of lack of internal resources for direct sourcing, and imports via importers from Asia are more likely to be recorded as coming through third countries. In addition, minimum run lengths are typically longer in Asia than, for example 'Greater Europe'.

<sup>12</sup> Garments produced in Hong Kong are relatively costly. Of course, most of those exported from Hong Kong do not originate there but are re-exports.

<sup>13</sup> A better understanding of the quantity of labour necessary to manufacture a garment meant that buyers could partly offset higher European labour costs by concentrating their European orders on garments where raw materials made up a very large part of total production costs.

Nonetheless, a majority of respondents were shifting at least some production 'nearer to home' and giving a need for shorter lead times as one of the reasons for it.

### Lead time changes

Respondents were questioned about their changing lead-time requirements. In order to throw greater light upon this issue Danish and Swedish companies will be discussed separately, since they were typically operating with different business models.

For all except one of the Danish companies interviewed their wholesale business was either their main one or was of equal importance to their retail one. These companies designed their own (seasonal) collections which were then shown to independent retailers in order to obtain advance orders. Advance orders typically made up 80%+ of their sales to independents and garments from the same collections typically make up anything between 30-70% of the intake of their own stores. Lead times for collections could be as long as six months. The remainder of their sourcing (their so-called 'open to buy' account) was closer to or within given seasons. Four Danish companies with a combination of wholesale and own retail businesses had developed programmes that they called 'Express', to try to minimise lead times for their 'open to buy' accounts, and at the same time to increase the share of the latter in their total intake. Lead times cited for 'Express' programmes were in a range between three and six weeks. 'Express' did not necessarily correspond to fashion wear in the sense garments that were highly differentiated in styling. More frequently it corresponded to 'basics' or differentiated basics subject to (often temporary) surges in demand.

Most of the companies interviewed that were 'driving the Express' had, when they started to do so, shifted sourcing 'closer to home'. But at least two of these had later managed to develop fabric-stockholding suppliers in the Indian sub-continent who could deliver on these lead times. One of the Danish retailers that was still placing a majority of its 'Express' orders in Europe itself stated that this was not on lead time grounds but because of the relatively short run lengths associated with this form of sourcing (see footnote 11).

The Swedish companies most interested in reducing lead times were exclusively retail chains. One was working and the other about to start working with three distinct groups of lead-times, namely less than 26 weeks, less than 13 weeks and less than four weeks. In both cases the shortest lead-time applied also to basics that were subject to demand surges. The middle one – wholly or partly – appeared to more or much more differentiated products. One of the companies concerned – for whom 30% of intake was already on lead times lower than 13 weeks – was in the process of shifting more sourcing 'close to home'. The other, which was

aiming to source 60% of its intake within 13 weeks, was in the process of moving its sourcing 'further out'.<sup>14</sup>

Two tendencies are much less ambiguous. The first is that production defined as both basic and not subject to possible demand surges, i.e., for which lead times could be unambiguously long – for example, children's leggings – was almost without exception sourced from cheapest possible origins. The second is that virtually all interviewees had abandoned, or certainly downgraded, thinking in terms of regionally-based production specialisations. 'These days it's possible to do the same things everywhere' was a common observation.

### New supplying countries

Only one of the companies interviewed, the largest, was actively considering entering new supplying countries. This company was already purchasing in more markets than any other and, moreover, had sufficient resources to expand its geographical base at the same time as expanding its number of direct suppliers. The new countries/regions it was considering entering were identified on the basis of a mixture of changes in trade regulation (new concessions in relation to current end-markets) and the possibility of realising short(er) lead-times in relation to planned new end-markets.

As in the UK case (Gibbon op. cit.) the great majority of companies interviewed had no policy of prospecting for new supply markets, and if and when they entered them this was likely to be the result of a relocation by an existing supplier. In the words of one respondent:

'we're not much into prospecting. We've experimented a bit in Tunisia recently, we've thought about it. But our business is built on partnerships, so we stick to where we are already. 15 years ago we did a lot of business in Ikast (Jutland). Those suppliers moved to Poland and we moved with them. Later, we moved with them again when they moved further out. It's never been necessary to look systematically for new places. Our price level has gone down but we've done this mainly by negotiations with existing suppliers. We haven't been looking for especially cheap new places.'

If anything, movement into new supplier markets by Scandinavian importers appears to be considerably less common than by UK ones. An indicator of this is that, while import concentration (measured as the share of total imports of the leading 20 suppliers) fell by more than 10 percent in the UK between 1985 and 2000, over the admittedly shorter period between 1990 and 2001 it fell by only 3.4% in Sweden and actually increased by 1.7% in Denmark.

<sup>14</sup> The second company also had more ambitious plans concerning the percentage of its intake that could be sourced in less than four weeks (30%, as opposed to the 10% achieved by the company that had already implemented this change).



## Interview data on suppliers and supplier management

### Types of supplier

Respondents were asked which types of suppliers they used, and to identify which type contributed the largest share of their intake. The major categories of supplier mentioned were overseas full manufacturers supplying directly to the respondent on a so-called free on board ('f.o.b.') basis<sup>15</sup>; (non-Scandinavian) agents based in producing countries; Scandinavian (in practice, Danish) trading houses or converters; Scandinavian importers; and licensees (either Scandinavian-based or international). 'Trading house' is used here to designate a company with offices in Scandinavia but with own production overseas. Trading houses also often act as, or themselves become, 'converters', i.e. companies (with offices in Scandinavia and overseas) who finance production including cloth and fabric procurement overseas on their own account. 'Importer' is used here to designate companies based in Scandinavia without own production overseas, importing (but not engaged in advance financing of production) on their own account or against orders from customers. 'Licensee' is used to designate companies, wherever based, that have obtained an official monopoly for selling-on the product of specific international brands.

**Table VII: Main supply channels (n respondents=10)**

	Frequency mentioned	Frequency mentioned as main source
Direct from overseas manufacturers	8	7
via Scandinavian trading houses and converters	7	1
via overseas-based agents	8	1
via Scandinavian importers	2	1
via licensees	1	0

Sources: own interviews

As many as seven of the firms interviewed stated that their main source of supply was direct purchases from overseas manufacturers; one each mentioned trading houses/converters, overseas-based agents and importers. However, since most firms used three different supply channels, being a main source of supply could account for anything between 35 and 95 percent of intake. Two respondents stated that direct purchases from overseas manufacturers represented 85%+ of intake. Both of these were chain stores, but in each case the pattern of sourcing concerned was linked with firm-specific peculiarities. In one case the firm was a very large internationalised retailer that had sought to develop direct sourcing as a competitive advantage (see below); the other had an extremely concentrated supply base, with only 15 suppliers accounting for virtually all of its directly sourced intake.

<sup>15</sup> In the international clothing trade a distinction is typically made between 'f.o.b.' and 'CMT' production. F.o.b. signifies that the manufacturer him/herself has financed production, while CMT signifies production using cloth, fabric and components supplied by the client.

A number of the companies using direct purchases from overseas manufacturers as their main source of supply had invested considerably in order to do so. The very large internationalised company mentioned had no fewer than 20 overseas offices employing 500 staff. Their offices monitored supplying country markets, identified and negotiated with suppliers and monitored suppliers' production (plus, more recently, their working conditions). Another three respondents each had four or more overseas offices, and each employed 60-100 overseas staff, while a further company had two such offices employing 30 staff in all. In most of these cases however, negotiation was still being undertaken largely by company head offices.

Both overall levels of direct sourcing from manufacturers and corresponding investments in infrastructures that supported this seem to considerably exceed those evident in the UK (Gibbon op. cit.). When this point was put to some of the Scandinavian companies concerned, the explanations offered fell into two groups. The largest respondent, who was a specialised retailer, stated that – at least in the last few years – investment in direct sourcing plus overseas offices had been driven by its definition of lead times as its major or potentially major competitive advantage. Decentralisation of negotiation (which in turn rested on an already obtained close knowledge of local markets) allowed major lead time gains, both in the placing of orders as such and in the combination of follow-up with negotiation. However, most of the other companies for which direct buying was the main source of supply, particularly the Danish ones, explained this in terms of their status as wholesalers as well as retailers, and to their historical roots in trading houses/converters.

'we've got the advantage of having always been buyers. The UK people are more retail oriented. It's a different mentality. The retail people in our own operation are nervous about it...'

While it was stated repeatedly that direct buying from overseas manufacturers was to be preferred, there was no corresponding trend toward the elimination of agents. A typically case was a department store that used Italian and Hong Kong agents for most of its men's wear, buying most of its women's wear directly from manufacturers, and worked closely with three other (non-competing) European retailers to place joint orders for both men's and women's wear with the same Hong Kong agent.

Seven of the ten respondents also sourced parts of their intake through companies that had once manufactured in Denmark but who were now acting as trading houses and/or converters, usually in the former Soviet Union and eastern Europe. Danish trading houses/converters were used both by Danish and Swedish retailers, although they tended to be used most by Danish retailers with large wholesale businesses.

The two companies relying for their main sources of supply on Danish trading houses/converters or Scandinavian importers were both super/hypermarkets. In one case intake was almost equally sourced from trading houses/converters and from overseas agents;



in the other, 98% of intake was said to be being sourced through importers. Although both major players in the Scandinavian clothing retail business, neither of these companies had invested in more than a small group of specialised clothing buyers.

Alongside the proposition advanced by one respondent that increasing direct sourcing could be used to significantly reduce lead times, the advantages of this channel that were normally mentioned were lower prices and better communication resulting from elimination of intermediaries. Except where negotiation was decentralised to them, the main advantage of the use of overseas offices in this channel was to

'...improve control and impose our own systems more effectively. The offices have specialists on site and they've allowed our colour matching and our QC to be upgraded...'

The companies that most emphasised the usefulness of using agents were those seeking to save most on direct overheads, while also minimising their levels of risk. Other commonly mentioned advantages of using agents included more effective communication where the markets concerned were new and/or were characterised by poor infrastructure, easier identification of new suppliers, assurance of suppliers' track record, the presence of good contacts with local textile sector and the possibility of piggy-backing on the leverage of larger clients. Where larger companies were using agents, they tended to demand additional services from them, such as fabric development.<sup>16</sup> The unit costs of using agents depended on the size of the business handled and on the services required. Unit commission costs equivalent to 25% over the standard f.o.b. supply price were mentioned in the case of intake from China.

Use of Danish trading houses/converters seemed to be considered a *sine qua non* of effective utilisation of the eastern European and former Soviet Union markets, not necessarily because of language/communication difficulties but because of the still parlous financial condition of locally-owned plants in these regions. This usually meant that orders either had to be placed with foreign investors in these regions, or organised on a foreign converter plus local CMT basis (or some combination of these two). Over and above this, especially in the case of Danish retailers, relations with this category of supplier were often long-standing, personally-based and embedded with mutual trust.

For one responding company a significantly minority of all intake (not just that from eastern Europe) was still being carried on a CMT basis – in this case mainly through non-Danish intermediaries. The retailer stressed that the choice within her own organisation between the two reflected divisions that were 'almost religious':

<sup>16</sup> At the same time some of the largest overseas-based agencies are themselves offering increased service levels. Li & Fung is planning the opening of a distribution centre in western Europe, for example.

'CMT means that you can't shift responsibility and that you carry more risk. But it allows us more flexibility in who we can use to do the manufacturing. We can get more low volume orders when we go CMT. And it's becoming easier to do it. (A lot of European CMTers can now do) their own component ordering (but on the basis of our nominations, of course)...'

### Size and structure of supplier base

As in the UK, reduction was the dominant tendency for changes in supply-base size over the decade prior to 2002. However, except in one case, there was no evidence that it had been consciously followed as a strategy for more effective 'supply chain management', i.e., on the basis of 'trying to be more important to fewer people'. Rather, reduction was normally seen as reflecting cyclical trends or as arising involuntarily as a result of the adoption of other strategies. So too, for this matter, were increases in supply base size.

**Table VIII: Changes in size of supply base 1992-2002 (N respondents= 10)**

Direction of change	Frequency
Reduced	5
Increased	3
No clear change	2

Sources: own interviews

Increases in supply base size had come about from mergers and acquisitions, increasing volumes in aggregate or for specific product types, initiation of new in-house brands or product types, or from efforts to find suppliers with other newly-prioritised characteristics, such as short lead times. Reductions came about through sale or closure of in-house brands, applying more exacting quality or Code of Conduct standards and –again– changes in volume requirements.

Only about half of the respondents were able to give clear answers to a question about supply base concentration levels. A median score from those that did suggested somewhat higher levels of concentration than those reported in the UK (where it was 60% of intake from the 20 leading suppliers, see Gibbon op. cit.) However, this was probably due to the relatively smaller overall size of Scandinavian as opposed to UK respondents' businesses. The category 'core supplier', common in the UK, was hardly used at all by respondents. Where suppliers were categorised by Scandinavian respondents it tended to be in terms of a composite impression of their capabilities rather than on the basis of their intake share.

### Expectations concerning suppliers

Respondents were asked about their expectations concerning suppliers' specific capabilities, in particular regarding design, fabric sourcing, stockholding and capacity. Similar questions had been asked of UK retailers, but in this case only in regard to 'core' suppliers on the one hand and 'new' ones on the other (Gibbon op. cit.). Since Scandinavian retailers hardly

used the category of 'core' supplier (see above), this question was taken as being about existing suppliers generally.

Scandinavian respondents were also asked directly whether their sourcing operations entailed multi-sourcing and/or replenishment programmes. The emergence of such programmes had been a finding of the UK study (repeated to a limited extent in a study of South Africa retailers (Gibbon 2002a)). Finally they were asked whether or not they saw their relations with certain more important suppliers in terms of 'partnerships'.

**Table IX: Services expected from existing suppliers (n respondents= 10)**

Service	Frequency
Full cloth/fabric sourcing	9
(Contribution to) design	5
Stockholding/Supplier-managed inventory	2
Capacity minimums	2

Source: own interviews

#### *Cloth/fabric sourcing*

Respondents commonly stressed that they required that suppliers buy and finance fabric and cloth, though they also typically nominated what cloth or fabric should be ordered.. In addition, other related services, such as knowledge of new fabric developments and 'good contacts with the textile sector in case there's a strike', were commonly expected.

#### *Design*

Three companies expected a full design service from suppliers and a further two expected a 'contribution' to design. The five remaining companies, who stated that all their design requirements were provided in-house, were all private label chains or offering private label product.

#### *Capacity:*

Although two respondents expressed demands for minimum capacity levels amongst their suppliers,<sup>17</sup> a majority of Scandinavian respondents interpreted this question to be about the share of suppliers' capacity that they expected to occupy. These all fell within the 30-70% range. These figures were surprisingly high. In a discussion of Mauritian producers' perceptions of the differences between US and EU retailers, Gibbon (forthcoming) reports that demands for capacity shares at these levels were considered more characteristic of US than EU end-markets. Many locally- (as opposed to overseas Chinese-)owned companies were reluctant to cede such high shares since they believed that doing so gave customers too

<sup>17</sup> One respondent stated that he looked for producers with the capacity to do runs of 70-80,000 pieces. The other simply indicated an exclusion from consideration of suppliers with less than 50 sewing machines.

much control over their businesses. In this connection, the general lack of acknowledgement of 'partnerships' by Scandinavian retailers (see below) is also surprising.

#### *Stockholding/Supplier-managed inventory*

Only two companies (a department store and a super/hypermarket) expected suppliers to hold stock for them as a matter of course. These were companies buying all, or large shares of intake through importers or agents rather than direct from manufacturers. A second super/hypermarket expected stockholding from 'a few suppliers (presumably licensees or agents, LT & PG) whose intake consists of brands and who are supplying other customers on this basis too'. Another company, whose main business was wholesale, itself provided this service to its customers, but did not receive it from its own suppliers.

#### *Multi-sourcing/replenishment*

Multi-sourcing is used here to refer to the practice of using suppliers from more than one region to produce different versions (e.g., different colours) of the same style more or less near to or within a given season, or to top up a version initially produced 'further out' on the basis of a radically shorter lead time. 'Replenishment' programmes refer to the practice of reserving capacity with manufacturing suppliers over a period of 6 months or longer, to produce a single style on the basis of guaranteed initial minimums and sometimes guaranteed repeat minimums, but without a definite ceiling. Under such programmes, variable volumes are re-specified, and expected to be delivered in-season on a weekly or daily basis.

Both these terms appeared linguistically unknown to respondents, although when explained they were readily understood. Such programmes are as yet marginal in Scandinavian retailing however. One Danish company had arrangements with some stockholding suppliers that included daily delivery targets and another stated that they were currently planning to introduce a replenishment programme but

'...we can't do it now and we don't do multi-sourcing either. It hasn't been necessary and we consider it dangerous...None of our suppliers are powerful enough for us to deal with them via electronic data interchange and we aren't yet developed enough ourselves to do it...'

Most Swedish companies were aware of the possibilities offered by these sourcing methods. The largest was already using some 6-month replenishment programmes but only had 1-year ones only with a few suppliers. A second Swedish chain was using multi-sourcing programmes (combining the Far East and Turkey) for some styles and planned a 6-month replenishment-type programme for 'predictable basics', which would involve 20-25 suppliers.

*'Partnerships'*

Respondents did not see their relations to their suppliers as 'partnerships', in the sense that this term is used by the 'relational marketing' school. While most respondents thought that their relation to certain suppliers, in terms of cooperation and mutually acknowledged obligations (e.g. production/delivery priority in exchange for continuity of business), was deeper than with most, there was a general reluctance to use the term 'partner'. Furthermore some indicated that, if they were to develop partnerships in the future, these would more likely be with agents rather than with manufacturers - on the basis that the services that could be expected from the great majority of the latter were limited.

The reluctance to use the term 'partner' reflected a general emphasis on the importance of not making long-term or binding commitments, except in circumscribed ways:

'we never wanted to be bound to specific suppliers...we have to be able to shift from someone who does linen to someone that's able to do denim...'

'We don't use this term. We don't think that we can or want to run factories in the way this implies, like Levi's do and M&S did. With that kind of arrangement you are under pressure to produce and sell everything they have the capacity to produce. I see this as one of the main problems that M&S faced. One needs to avoid this kind of problem...When I worked in China some of the Germans there had partnerships with local suppliers. They ended up spending more time working out how to use their suppliers' capacity than they did on planning where to allocate their orders.'

*Monitoring of suppliers*

Respondents were asked how their suppliers were monitored. About half stated that they did some monitoring of suppliers, but it was not always clear what this meant in practice. Apart from one Swedish respondent - which had only done so a year earlier - none of the companies had set up a bureaucratic system with explicit guidelines for monitoring and with recording of the results. Another conducted a less systematic annual review and a third undertook regular inspections of suppliers' factories. Otherwise monitoring - where it occurred at all - seemed to mainly take the form of joint meetings/discussions with suppliers. Loose and informal monitoring was said to be generally preferred on the grounds that:

'categorising suppliers by looking e.g. at delivery records and customer returns would be impersonal and unnecessary...the decision to keep a supplier or not is actually quite simple'.

The company that was undertaking a bureaucratic review of supplier performance put most emphasis on ensuring that factories had correct systems (including Codes of Conduct) in place. On the other hand, even in this company there was doubt about what to do with the results of most monitoring, other than to drop a few suppliers altogether:

'a lot of them just want to survive. They're not that interested in improving. The only thing we can really offer them in exchange for improving is more volume. And for some companies, like state-owned enterprises in China, this isn't even an incentive...'

Factory visits were generally left to agents, except in the couple of the cases already mentioned or when buyers otherwise happened to 'be in the neighbourhood'.

**Choice of new suppliers (in developing countries)**

Finally, companies were asked what principles they applied in selection of new suppliers. The criteria referred to were generally less demanding than those reported by UK retailers (Gibbon 2001).

**Table X: Selection principles for new suppliers in developing countries (N respondents=9)**

Principle	Frequency
Price conformity	7
'Chemistry'/signs of potential responsiveness	4
Service capacity	4
Lead times	3
Code of Conduct conformity	3
Production capacity	2
Technical/fabric sourcing capacity	2
Financial strength	2
Presence of other reputable clients	2
Quota (where applicable)	2

NB Most respondents gave more than one response

Source: own interviews

Full fabric/cloth sourcing and dedicated account management were insisted upon in all cases by UK retailers, whereas they were mentioned in only around half of all cases by Scandinavian respondents. As regards other criteria, these tended to be applied in quite different ways. Whereas UK retailers essentially demanded that new suppliers 'bring something new to the table' that existing ones were not providing, Scandinavian ones looked for the same things in new suppliers as they found in existing ones. For example, rather than looking for 'radically reduced prices' (as in the some UK cases) they looked for conformity with existing price levels. Similar contrasts were evident in respect of design (rather than 'new design ideas', 'design services'), cloth and fabric (rather than 'vertical integration', 'fabric sourcing capability' and production capabilities (rather than 'special manufacturing skills', 'technical capacity'). There was also a tendency amongst Scandinavian respondents to provide more vague answers to the question (e.g., 'chemistry') that their UK counterparts.

One criterion mentioned by exactly the same number of respondents in both studies was supplier conformity to retailers' Codes of Conduct. It is worth noting that three of the four Swedish respondents spontaneously mentioned this as a selection criterion, while none of the six Danish respondents did so.



When asked *how* they identified new suppliers, respondents often repeated the observation that they engaged in little prospecting activity. Suppliers were usually the ones to contact buyers rather than vice versa. In such cases, the first contact often took the form of cold calls, although some respondents also mentioned meeting potential suppliers in other ways, e.g. at trade fairs. Still, only four respondents stated that they took cold calls (or similar contacts initiated by suppliers) seriously and kept records of them for potential future use. Four other respondents stated that if they wished to identify new suppliers they would go through third parties such as other retailers or European, Hong Kong-owned or local agents. Agents were generally seen to serve as guarantors. Only in one or two cases did overseas offices have the identification of new suppliers as a core activity, and even for these, new suppliers were expected to be working with other European buyers. None of the respondents made much use of embassies or their respective Foreign Ministries to get in contact with suppliers, since they 'don't know the industry and there's always a mass of other sources of information you can use...'

## Conclusion

The broader significance of the findings presented here is probably best illuminated by a longer and more systematic comparison between them and those presented for the UK in Gibbon (op. cit.).<sup>18</sup> The comparison begins with a summary of the main ways in which sourcing geographies differ before considering differences in types of suppliers and supplier management strategies used and the reasons for these differences.

Relative to the UK, Scandinavian retailers' clothing import geographies were considerably more EU- and eastern European-centred, with lower import shares from the Mediterranean and the Newly Industrialised Countries of the Far East (Hong Kong, Korea, Taiwan). Sourcing from the rest of the world (in both cases the largest single region of origin) was somewhat lower than for the UK, but was increasing faster. The most obvious reasons for these differences in geography are likely to be a greater importance of re-exports in Scandinavian markets (especially the Swedish one) as well as retailers' smaller average size, which translates into shorter run lengths and thus greater use of suppliers with low minimums (more likely to be found in the EU). Amongst the Scandinavian firms sampled, who were all much larger than average for Sweden and Denmark, there were similar levels of import dependence on Far Eastern origins to UK firms sampled but much greater levels of dependence on 'Greater Europe' excluding the EU. The delocalisation of a large part of Scandinavian (essentially Danish) clothing manufacture to eastern Europe from 1985 onwards seems to be key factor in this.

<sup>18</sup> A more elaborate discussion of the UK findings is found in Gibbon (2002b) and the latter version of this paper is drawn upon more heavily in the comparison that follows.

In terms of what can be described as guiding 'sourcing philosophies', the study did not find anywhere like the same degree of emphasis on 'Supply Chain Management' (SCM) doctrines in Scandinavia as in the UK. That is, discourses advocating the overhaul or 'ungluing' of supply chains by eliminating intermediaries, concentrating on fewer but more capable suppliers, demanding more services from them and using bureaucratic procedures to monitor their performance, etc., were hardly encountered. Nor was related terminology such as 'core suppliers', 'partnerships' and 'supplier managed inventory'. This is not to say that 'core suppliers', 'partners' and 'supplier managed inventory' were completely absent. Rather, they were sometimes present but not as the result of the application of a single coherent (in reality, only semi-coherent) strategy.

If there was a red thread running through the innovations that Scandinavian retailers were undertaking in practice, it was that of giving a greatly heightened importance to reducing lead times. This was being privileged for a similar practical reason as in the UK (to increase the availability of fast-selling styles within season) and being pursued in not dissimilar ways. For example, similar efforts were in train to avoid reductions in lead times having to mean *only* a shift of sourcing 'closer to home' - and therefore to more expensive production locations. Some of these efforts were quite innovative, for example in one case promoting field-based negotiation and the combination of field-based follow-up and negotiation, via opening multiple and multi-functional overseas offices.

The lead time issue shows that Scandinavian retailers were not making significantly looser demands on existing suppliers than UK ones on specific indicators. This applies to price, for fabric sourcing, for quality and (at least as far as Swedish retailers were concerned) for Code of Conduct conformity. But the range of service capabilities that they demanded from existing suppliers was usually narrower, while in the case of new suppliers what was demanded was conformity to the capabilities of existing suppliers rather than something radically new (the UK approach).

These differences go back partly to the differences in degrees of prevalence of SCM doctrines. But they also reflect another, possibly related difference. This was in the nature of 'main' supply channels in the two locations. In the UK, despite all the talk of elimination of intermediaries, only for a minority of respondents was direct sourcing from manufacturers a main source. In Scandinavia it was the main channel for a clear majority.

The reasons why trading houses, converters and importers were together more significant than manufacturers as supply channels for UK retailers are complex. They relate to contradictions within the group of precepts flowing from Anglo-Saxon doctrines of 'shareholder value', which seem to be particularly acute in the case of its application to retail. Some of these precepts prescribe achievement of market leadership by increasing store numbers and sizes, sales volumes and numbers of styles. Others prescribe increasing margins by evacuating all



'back-of-house' functions, and others again prescribe 'ungluing supply chains'. Gibbon (2002b) argues that, since in the UK the sourcing function continues in practice to be controlled by retail specialists rather than accountants, sales expansion and ensuring the correct timing of the appearance of fast-selling product have taken precedence, and 'back-of-house' functions have been transferred to intermediaries who charge very high commissions in exchange for guaranteeing delivery and quality reliability.

In Scandinavia, despite the fact that many Swedish retailers are also listed companies, 'shareholder value' doctrines are less evident. This is mainly reflected in a lower degree of pressure to externalise 'back-of-house' functions. Sales maximisation strategies by contrast are as rampant as in the UK and are just as heavily focussed on 'getting lead times right'. But since there is less pressure to externalise both functions, modification of direct purchasing methods are seen as the appropriate way to attain them.

At the same time most of the leading players in Denmark are themselves mainly wholesalers. Within these companies the sourcing function is often located in former production departments – departments where production was once itself a function or where there remains a concentration of expertise on (sub-) contracting with other manufacturers. This reinforces the bias toward direct sourcing.

On the basis of this comparison, a few common elements of a 'Scandinavian' as opposed to a UK sourcing model can be suggested: importance of wholesaling and exports; partial supply dependence on eastern Europe (and former Danish manufacturers operating there); prioritisation of lead times; and reliance on direct sourcing. Behind this model seem to lay a series of absences of trends notable elsewhere, rather than the presence of clear alternative underlying trend. In particular, large domestic markets, long-established de-industrialisation and (perhaps relatedly) the 'shareholder value' doctrine are all relatively absent. Most historical discussions of 'Scandinavian models' of other kinds have focussed heavily on their distributive attributes. Whether this model offers more than the Anglo-Saxon one for developing country producers will be explored in a later paper.<sup>19</sup>

<sup>19</sup> A third retailer study paralleling this one and that already undertaken in the UK is being carried out in France. When this is completed it is intended to write a comparative paper, discussing differences between the three countries and their implications for market entry and upgrading by developing country producers.

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**Appendix I:**  
**Clothing import data for Denmark and Sweden**



## 1. DENMARK'S APPAREL IMPORTS 1988-2001. DISTRIBUTION BY COUNTRY, GROUP OF COUNTRIES AND LEADING CATEGORIES OF APPAREL

**Table 1.1: Denmark apparel imports 1988-2001 (all categories)**

**Total imports (,000 ECU/EURO)**

1988	1990	1995	2000	2001
716.402	873.224	1.439.307	2.253.657	2.331.158

#### Leading 20 exporters ( % )

Rank	1988		1990		1995		2000		2001	
1	Portugal	10,9	China	14,6	China	11,9	China	19,1	China	18,6
2	Fr Germany	10,3	Portugal	12,5	Poland	10,7	Poland	8,5	Poland	8,5
3	Hong Kong	10,1	Fr Germany	8,8	Portugal	9,9	Italy	6,9	Italy	7,4
4	China	9,8	Italy	7,7	Fr Germany	8,9	Fr Germany	5,6	Turkey	6,6
5	Italy	9,4	Hong Kong	7,3	Italy	7,5	Hong Kong	5,3	Fr Germany	6,2
6	Utd. Kingdom	5,9	Utd. Kingdom	6,1	Hong Kong	6,3	Portugal	5,1	Portugal	4,8
7	South Korea	4,5	Poland	4,5	Utd. Kingdom	6,1	Turkey	4,9	Sweden	4,8
8	Austria	3,7	Turkey	4,1	India	3,4	Sweden	4,6	Lithuania	4,6
9	Thailand	2,9	Thailand	3,7	Turkey	3,3	Lithuania	4,4	Hong Kong	4,3
10	Turkey	2,8	Austria	3,5	Sweden	3,1	Utd. Kingdom	3,6	Utd. Kingdom	3,4
11	Poland	2,6	Netherlands	2,7	Austria	3,0	France	3,1	Bangladesh	3,2
12	Netherlands	2,3	India	2,3	Bangladesh	2,6	Bangladesh	3,0	India	2,9
13	France	2,0	France	2,1	Netherlands	2,5	India	2,9	Netherlands	2,9
14	Greece	2,0	Greece	2,0	Lithuania	2,1	Netherlands	2,8	France	2,2
15	Macao	1,8	Indonesia	1,7	France	2,0	Austria	2,4	Austria	2,2
16	Sweden	1,6	Tunisia	1,4	Indonesia	1,9	Belgium	1,9	Belgium	2,1
17	Finland	1,6	Macao	1,4	Thailand	1,4	Latvia	1,7	Latvia	2,0
18	India	1,6	Bangladesh	1,3	Macao	1,2	Indonesia	1,6	Indonesia	1,4
19	Belg.-Luxbg	1,5	Sweden	1,2	Greece	1,0	Thailand	1,3	Thailand	1,1
20	Philippines	1,1	South Korea	1,2	South Korea	0,9	South Korea	1,2	South Korea	1,0
	<b>Top 20=</b>	<b>88,4</b>		<b>89,7</b>		<b>89,7</b>		<b>89,9</b>		<b>90,1</b>

Table 1.2: New countries with 1%+ of total import value

1990	1995	2000	2001
Tunesia Indonesia	Lithuania	Latvia South Korea Belgium	

Table 1.3: Countries dropping out of top 20

1988 - 1990	Belgium-Luxbg, Finland, Philippines
1990 - 1995	Tunesia
1995 - 2000	Greece, Macao
2000 - 2001	

Table 1.4: Largest single clothing items import by value

1988	1990	1995	2000	2001
Pullovers	Women's trousers	Pullovers	Pullovers	Pullovers
Men's trousers	Men's trousers	Women's trousers	Women's trousers	Women's trousers
Women's trousers	Pullovers	Men's trousers	T-shirts	T-shirts
Women's underwear	Women's underwear	T-shirts	Men's trousers	Men's trousers
Men's shirts	T-shirts	Women's blouses	Women's blouses	Women's blouses
Women's overcoats	Women's blouses	Men's shirts	Men's shirts	Men's shirts
Women's blouses	Men's shirts	Women's underwear	Women's underwear	Women's underwear
T-shirts	Men's underwear	Women's dresses	Women's skirts	Women's skirts
Women's skirts	Women's overcoats	Women's skirts	Women's overcoats	Women's overcoats
Men's underwear	Women's skirts	Women's overcoats	Women's dresses	Men's underwear
Women's dresses	Men's suits	Men's underwear	Men's underwear	Women's dresses
Men's suits	Women's dresses	Men's suits	Men's suits	Men's suits
Women's suits	Women's suits	Women's suits	Women's suits	Women's suits



## 2. IMPORT PROFILES BY PRODUCT

Table 2.1: Women's/Girls' Overcoats

	1988	1990	1995	2000	2001					
<b>Total imports ,000 ECU/EURO</b>	34.597	25.890	49.719	75.596	72.049					
<b>% of all clothing imports</b>	4,8	3,0	3,5	3,4	3,1					
<b>Rank</b>										
<b>1</b>	South Korea	27,5	Fr Germany	20,3	Fr Germany	15,6	China	24,4	China	21,9
<b>2</b>	Fr Germany	14,7	Hong Kong	12,1	Poland	13,8	Fr Germany	8,2	Fr Germany	9,9
<b>3</b>	Poland	13,6	China	10,9	China	12,9	Netherlands	7,6	Netherlands	7,6
<b>4</b>	Hong Kong	12,2	Poland	10,0	Hong Kong	8,1	Hong Kong	6,6	Hong Kong	6,5
<b>5</b>	China	6,8	South Korea	5,8	Indonesia	5,9	Indonesia	6,5	Poland	5,6
<b>6</b>	Utd. Kingdom	5,2	Portugal	5,0	Portugal	5,3	Poland	6,2	Sweden	5,4
<b>7</b>	Finland	3,5	India	4,7	Utd. Kingdom	4,7	Sweden	4,4	Utd. Kingdom	3,5
<b>8</b>	Thailand	3,0	Indonesia	4,2	Vietnam	4,5	Italy	4,0	Vietnam	3,5
<b>9</b>	Portugal	1,9	Utd. Kingdom	4,2	Finland	3,8	Vietnam	3,3	Italy	3,2
<b>10</b>	Netherlands	1,8	Thailand	4,1	Turkey	3,3	South Korea	3,1	Turkey	3,2
<b>Top 10 =</b>	<b>90,2</b>	<b>81,3</b>	<b>77,9</b>	<b>74,4</b>	<b>70,4</b>					

Table 2.2: Men's / Boys' Suits

	1988	1990	1995	2000	2001				
<b>Total imports ,000 ECU/EURO</b>	13.272	12.476	15.477	23.825	24.779				
<b>% of all clothing imports</b>	1,9	1,4	1,1	1,1	1,1				
<b>Rank</b>									
1 Austria	17,5	Austria	26,1	Fr Germany	40,5	Fr Germany	34,6	Fr Germany	31,5
2 Fr Germany	17,1	Fr Germany	18,5	Austria	15,2	Poland	17,7	Portugal	25,0
3 China	13,5	Portugal	9,5	Poland	8,5	Portugal	11,8	Poland	13,6
4 Finland	10,2	Czechoslovak	9,4	Czech Rep.	6,8	Italy	6,1	Italy	6,5
5 Portugal	8,6	Netherlands	6,3	Italy	6,3	Slovakia	5,5	Slovakia	5,7
6 Czechoslovak	7,4	Yugoslavia	5,8	Utd. Kingdom	4,1	Finland	5,3	Austria	3,1
7 Belg.-Luxbg	5,7	Finland	5,0	Portugal	4,0	Austria	3,6	Turkey	3,0
8 Italy	2,9	Thailand	4,1	For.JRep.Mac	2,9	Czech Rep.	3,0	Finland	2,5
9 Yugoslavia	2,9	China	3,1	Finland	2,3	Turkey	2,3	China	1,6
10 Sweden	2,3	Poland	2,8	Slovakia	2,3	China	2,0	Czech Rep.	1,6
<b>Top 10 =</b>	<b>88,1</b>	<b>90,6</b>	<b>93,0</b>	<b>91,9</b>	<b>94,2</b>				

Table 2.3: Men's / Boys' Trousers

	1988	1990	1995	2000	2001
<b>Total imports ,000 ECU/EURO</b>	62.821	79.576	121.299	181.972	214.361
<b>% of all clothing imports</b>	8,8	9,1	8,4	8,1	9,2
<b>Rank</b>					
1 Hong Kong	19,5	Utd. Kingdom	18,2 Portugal	15,3 Italy	17,3 Italy
2 Portugal	12,4	Italy	16,2 Italy	11,4 Portugal	9,6 Fr Germany
3 Utd. Kingdom	10,2	Portugal	14,5 Sweden	10,8 Fr Germany	9,1 Turkey
4 Italy	10,1	Hong Kong	13,4 Utd. Kingdom	9,8 Sweden	8,7 Sweden
5 Fr Germany	9,2	Fr Germany	6,3 Hong Kong	9,1 China	7,2 China
6 Belg.-Luxbg	4,6	Belg.-Luxbg	4,2 Fr Germany	7,4 Netherlands	6,0 Portugal
7 Thailand	3,2	Turkey	2,9 Poland	4,9 Hong Kong	5,5 Lithuania
8 Greece	3,1	China	2,5 China	4,0 Poland	5,4 Netherlands
9 Finland	3,0	Netherlands	2,2 Macao	3,2 Belgium	4,6 Poland
10 China	2,5	Thailand	1,9 Greece	2,7 Turkey	4,2 Belgium
<b>Top 10 =</b>	<b>77,8</b>	<b>82,3</b>	<b>78,6</b>	<b>77,6</b>	<b>78,4</b>

Table 2.4: Women's / Girls' Trousers

	1988	1990	1995	2000	2001
<b>Total imports ,000 ECU/EURO</b>	55.279	88.825	121.840	264.134	266.328
<b>% of all clothing imports</b>	7,7	10,2	8,5	11,7	11,4
<b>Rank</b>					
1 Italy	22,0	Italy	16,0 Italy	14,3 Italy	13,0 Italy
2 Hong Kong	15,4	Hong Kong	10,2 Poland	13,0 China	10,9 Turkey
3 Utd. Kingdom	9,5	Utd. Kingdom	9,4 Fr Germany	8,3 Poland	10,8 Poland
4 Fr Germany	9,5	Portugal	9,4 Utd. Kingdom	8,2 Turkey	8,5 China
5 Portugal	8,6	Fr Germany	8,4 China	7,9 France	8,1 Lithuania
6 China	4,9	Poland	7,6 Hong Kong	6,7 Hong Kong	5,8 Hong Kong
7 Malta	3,0	China	5,5 Turkey	5,4 Lithuania	5,7 Fr Germany
8 Turkey	2,8	Turkey	5,4 Portugal	4,7 Fr Germany	5,1 France
9 Greece	2,7	Tunisia	5,2 Bulgaria	3,1 Sweden	4,3 Sweden
10 Belg.-Luxbg	2,5	Netherlands	2,5 Lithuania	3,0 Bulgaria	3,4 Bulgaria
<b>Top 10 =</b>	<b>80,9</b>	<b>79,6</b>	<b>74,6</b>	<b>75,5</b>	<b>76,2</b>

Table 2.5: Women's / Girls' Suits

	1988	1990	1995	2000	2001					
<b>Total imports ,000 ECU/EURO</b>	4.829	4.542	8.408	9.707	8.065					
<b>% of all clothing imports</b>	0,7	0,5	0,6	0,4	0,3					
<b>Rank</b>										
1	Fr Germany	26,7	Fr Germany	21,4	Fr Germany	25,3	Utd. Kingdom	41,8	Utd. Kingdom	45,0
2	Utd. Kingdom	19,1	Utd. Kingdom	20,0	China	24,3	China	20,3	China	14,6
3	France	9,0	China	13,1	Utd. Kingdom	17,6	Poland	11,9	Poland	9,7
4	China	8,2	France	7,4	Belg.-Luxbg	7,2	Sweden	7,4	Sweden	7,2
5	Italy	5,6	Macao	5,7	France	5,3	Fr Germany	5,9	Italy	6,1
6	Sweden	4,9	Portugal	5,5	Italy	5,0	France	4,9	Fr Germany	5,5
7	Portugal	4,1	Finland	4,1	Portugal	4,3	Italy	3,8	Turkey	5,3
8	India	3,8	Italy	3,1	Poland	2,2	Finland	0,6	France	3,0
9	Thailand	3,8	Sweden	2,9	India	1,2	Russia	0,5	Czech Rep.	1,2
10	Hong Kong	1,9	Malaysia	2,5	Norway	1,1	Belgium	0,5	USA	0,8
<b>Top 10 =</b>	<b>87,1</b>	<b>85,7</b>	<b>93,3</b>	<b>97,7</b>	<b>98,5</b>					

Table 2.6: Women's / Girls' Dresses

	1988	1990	1995	2000	2001					
<b>Total imports ,000 ECU/EURO</b>	14.346	11.669	52.524	56.133	44.591					
<b>% of all clothing imports</b>	2,0	1,3	3,6	2,5	1,9					
<b>Rank</b>										
1	Fr Germany	20,5	Utd. Kingdom	31,7	Utd. Kingdom	15,2	Hong Kong	14,7	India	13,2
2	Utd. Kingdom	20,4	Fr Germany	18,5	India	14,5	Poland	11,9	Poland	10,5
3	Portugal	11,5	Portugal	7,0	Fr Germany	11,9	India	11,0	Hong Kong	10,4
4	France	5,4	France	6,8	Hong Kong	8,8	Lithuania	9,3	China	9,0
5	Hong Kong	5,3	India	6,3	Poland	7,7	China	7,3	Lithuania	8,7
6	India	4,9	Greece	3,5	Portugal	5,9	Utd. Kingdom	6,6	Utd. Kingdom	7,1
7	Thailand	3,8	Poland	3,4	Italy	4,9	Sweden	6,4	Sweden	5,8
8	Sweden	3,6	Malaysia	3,1	China	4,7	Fr Germany	5,7	Fr Germany	5,7
9	Netherlands	3,6	Finland	3,0	Lithuania	3,9	France	4,8	France	4,4
10	Italy	2,6	Sweden	3,0	Turkey	3,3	Turkey	2,8	Turkey	3,5
<b>Top 10 =</b>	<b>81,7</b>	<b>86,2</b>	<b>80,8</b>	<b>80,5</b>	<b>78,3</b>					



Table 2.7: Women's / Girls' Skirts

		1988			1990			1995			2000			2001
Total imports ,000 ECU/EURO		26.891			24.531			49.846			78.656			73.020
% of all clothing imports		3,8			2,8			3,5			3,5			3,1
Rank														
1	Portugal	15,6	Fr Germany	19,1	Poland	16,6	China	24,1	China	22,3				
2	Fr Germany	15,2	Portugal	16,0	Fr Germany	14,5	Poland	16,0	Poland	14,4				
3	Tunisia	10,5	Tunisia	14,7	India	11,3	India	7,1	Turkey	9,3				
4	Greece	6,6	Poland	9,4	China	8,1	Lithuania	6,7	Fr Germany	6,3				
5	Poland	6,2	Utd. Kingdom	5,3	Utd. Kingdom	6,6	Fr Germany	6,6	Sweden	6,2				
6	Hong Kong	6,0	Morocco	4,9	Portugal	5,8	Sweden	5,6	India	6,2				
7	Utd. Kingdom	5,2	India	4,4	Tunisia	5,0	Turkey	4,4	Lithuania	5,5				
8	China	4,4	Hong Kong	3,1	Hong Kong	4,3	Utd. Kingdom	4,4	Italy	5,2				
9	Italy	3,9	Greece	2,6	Turkey	3,9	France	4,3	Utd. Kingdom	4,5				
10	India	3,6	Italy	2,3	Italy	3,5	Portugal	3,4	Latvia	3,4				
Top 10 =		77,2			81,9			79,7			82,6			83,3

Table 2.8: Men's / Boys' Shirts

	1988	1990	1995	2000	2001
<b>Total imports ,000 ECU/EURO</b>	38.062	46.695	72.667	96.424	96.655
<b>% of all clothing imports</b>	5,3	5,3	5,0	4,3	4,1
<b>Rank</b>					
1 Hong Kong	23,5 Hong Kong	19,8 Hong Kong	14,8 Hong Kong	16,7 Bangladesh	12,6
2 Portugal	13,6 Portugal	14,8 Portugal	14,0 Portugal	14,1 Portugal	11,0
3 Fr Germany	9,6 Bangladesh	8,6 Bangladesh	12,1 China	9,4 China	9,3
4 Macao	8,3 Fr Germany	7,9 India	10,1 Bangladesh	9,0 Hong Kong	9,3
5 Thailand	6,3 Thailand	7,0 Fr Germany	7,6 Fr Germany	6,6 India	9,0
6 India	5,4 India	7,0 Poland	6,2 India	6,4 Fr Germany	7,8
7 Bangladesh	5,2 Macao	6,6 China	4,5 Poland	6,2 Poland	6,5
8 China	3,0 China	4,6 Turkey	4,2 Sweden	5,0 Turkey	5,9
9 Netherlands	2,6 Italy	3,3 Thailand	4,0 Turkey	4,3 Sweden	4,4
10 Italy	2,5 Netherlands	2,3 Sweden	3,0 Malaysia	3,4 Italy	3,9
<b>Top 10 =</b>	<b>80,1</b>	<b>82,0</b>	<b>80,5</b>	<b>81,1</b>	<b>79,7</b>

Table 2.9: Women's / Girl's Blouses

	1988		1990		1995		2000		2001
<b>Total imports</b> <b>,000 ECU/EURO</b>	32.924		49.286		98.077		135.766		159.146
<b>% of all clothing imports</b>	4,6		5,6		6,8		6,0		6,8
<b>Rank</b>									
1 Fr Germany	14,7	Fr Germany	19,1	Poland	26,7	Poland	22,7	Poland	23,4
2 Poland	11,6	Poland	11,7	Hong Kong	11,7	Lithuania	13,0	Lithuania	11,8
3 Hong Kong	9,2	Portugal	9,0	Fr Germany	9,8	Utd. Kingdom	8,8	India	9,7
4 Utd. Kingdom	9,0	India	8,7	India	7,1	Hong Kong	8,5	Utd. Kingdom	8,5
5 Greece	9,0	Hong Kong	8,1	Utd. Kingdom	6,6	India	8,3	Hong Kong	8,1
6 Malaysia	7,5	Utd. Kingdom	6,8	China	5,8	China	6,3	China	5,4
7 India	5,5	Greece	6,7	Portugal	5,5	France	4,3	Fr Germany	4,0
8 Italy	5,4	Netherlands	4,2	Lithuania	5,3	Fr Germany	3,7	Portugal	3,7
9 Portugal	3,9	Turkey	2,9	Italy	2,5	Italy	3,5	France	3,6
10 Netherlands	3,3	Italy	2,8	France	2,4	Portugal	3,5	Italy	3,3
<b>Top 10 =</b>	<b>78,9</b>		<b>79,9</b>		<b>83,4</b>		<b>82,6</b>		<b>81,5</b>

Table 2.10: T-Shirts

	1988		1990		1995		2000		2001
<b>Total imports</b> <b>,000 ECU/EURO</b>	30.810		52.473		99.603		214.158		214.782
<b>% of all clothing imports</b>	4,3		6,0		6,9		9,5		9,2
<b>Rank</b>									
1 Portugal	21,8	Portugal	26,5	Bangladesh	17,0	Bangladesh	14,4	Bangladesh	13,5
2 Fr Germany	7,5	Greece	8,7	Portugal	15,2	Turkey	10,9	Turkey	10,9
3 Italy	6,1	Bangladesh	8,6	China	6,3	China	9,4	China	9,8
4 Mauritius	5,7	Fr Germany	8,3	Turkey	6,1	Portugal	7,8	Poland	9,4
5 Hong Kong	5,4	Utd. Kingdom	4,6	Utd. Kingdom	5,9	Lithuania	7,6	Portugal	8,6
6 Greece	4,9	Netherlands	3,9	Poland	4,7	Poland	7,6	Lithuania	6,6
7 Turkey	4,5	India	3,6	Lithuania	3,9	Sweden	5,2	Sweden	5,9
8 Utd. Kingdom	4,3	Turkey	3,6	Sweden	3,8	Hong Kong	4,2	Fr Germany	5,0
9 Netherlands	3,2	Hong Kong	3,6	Hong Kong	3,7	Utd. Kingdom	4,0	India	4,2
10 Egypt	3,1	Italy	3,2	Fr Germany	3,4	Fr Germany	3,7	Latvia	3,2
<b>Top 10 =</b>	<b>66,5</b>		<b>74,7</b>		<b>70,1</b>		<b>74,9</b>		<b>77,1</b>

Table 2.11: Pullovers

	1988	1990	1995	2000	2001				
<b>Total imports ,000 ECU/EURO</b>	91.198	79.141	174.765	300.048	316.812				
<b>% of all clothing imports</b>	12,7	9,1	12,1	13,3	13,6				
<b>Rank</b>									
1 Portugal	21,1	Portugal	29,4	Portugal	13,0	China	8,8	Turkey	9,0
2 Italy	13,4	Italy	10,8	Poland	12,9	Italy	8,7	Italy	9,0
3 Fr Germany	10,8	Hong Kong	8,6	Italy	11,1	Poland	8,4	China	8,4
4 Hong Kong	8,5	Fr Germany	8,3	Hong Kong	8,2	Turkey	8,3	Poland	8,2
5 Utd. Kingdom	6,5	Utd. Kingdom	5,1	China	7,2	Portugal	7,0	Portugal	7,1
6 Netherlands	4,4	South Korea	3,4	Utd. Kingdom	6,2	Utd. Kingdom	4,6	Bangladesh	6,2
7 South Korea	4,2	Greece	3,4	Turkey	5,9	Hong Kong	4,6	Hong Kong	5,2
8 Mauritius	3,4	Netherlands	3,2	Fr Germany	5,4	Bangladesh	4,4	Indonesia	4,7
9 France	3,4	Thailand	3,1	Lithuania	3,6	Fr Germany	4,4	Utd. Kingdom	4,4
10 Thailand	3,3	Turkey	3,1	Macao	3,0	Sweden	4,2	Fr Germany	4,2
<b>Top 10 =</b>	<b>79,0</b>	<b>78,5</b>	<b>76,4</b>	<b>63,4</b>	<b>66,4</b>				

Table 2.12: Men's / Boys' Underwear

	1988		1990		1995		2000		2001	
<b>Total imports ,000 ECU/EURO</b>	23.747		36.448		23.471		47.139		44.756	
<b>% of all clothing imports</b>	3,3		4,2		1,6		2,1		1,9	
<b>Rank</b>										
1	China	64,9	China	79,1	China	34,5	China	44,0	China	40,4
2	Hong Kong	10,5	Hong Kong	5,2	Austria	9,0	Netherlands	9,0	Lithuania	10,1
3	Italy	5,0	Fr Germany	3,0	Portugal	8,4	Lithuania	7,9	Austria	6,4
4	Fr Germany	4,0	Portugal	2,7	Poland	7,6	Austria	5,5	Turkey	5,5
5	Portugal	2,2	Poland	2,0	Lithuania	6,0	Fr Germany	5,0	Poland	5,4
6	Poland	1,9	Italy	1,3	Fr Germany	5,1	India	4,6	India	5,0
7	Utd. Kingdom	1,6	Turkey	1,0	Utd. Kingdom	3,6	Sweden	4,3	Fr Germany	4,7
8	Pakistan	1,0	Pakistan	1,0	Italy	3,4	Poland	3,5	Sweden	4,5
9	Turkey	1,0	France	0,6	Sweden	3,1	Portugal	3,0	Netherlands	3,0
10	Netherlands	0,9	Macao	0,5	Pakistan	3,1	Turkey	2,4	Macao	2,7
<b>Top 10 =</b>	<b>93,2</b>		<b>96,4</b>		<b>83,6</b>		<b>89,1</b>		<b>87,9</b>	



Table 2.13: Women's / Girls' Underwear

	1988	1990	1995	2000	2001				
<b>Total imports ,000 ECU/EURO</b>	46.539	72.509	72.664	88.248	89.675				
<b>% of all clothing imports</b>	6,5	8,3	5,0	3,9	3,8				
<b>Rank</b>									
1 China	33,2	China	48,2	Austria	26,2	China	32,8	China	30,2
2 Austria	26,3	Austria	20,4	China	19,3	Austria	28,5	Austria	24,8
3 Hong Kong	8,1	Hong Kong	4,7	Fr Germany	16,2	France	4,3	Sweden	4,1
4 Italy	5,4	Portugal	4,4	Portugal	4,3	Sweden	3,8	Fr Germany	3,7
5 Fr Germany	5,4	Italy	3,5	Italy	4,1	India	3,4	France	3,4
6 Portugal	2,5	Fr Germany	3,2	Utd. Kingdom	4,0	Turkey	3,2	Lithuania	3,0
7 France	2,1	France	2,6	Netherlands	3,5	Fr Germany	3,1	Portugal	2,7
8 Turkey	1,9	Pakistan	1,6	Hong Kong	3,4	Poland	2,0	Ukraine	2,7
9 Utd. Kingdom	1,8	Utd. Kingdom	1,6	India	3,1	Belgium	2,0	Belarus	2,0
10 Pakistan	1,5	Greece	1,5	France	2,9	Italy	2,0	Latvia	2,0
<b>Top 10 =</b>	<b>88,3</b>	<b>91,7</b>	<b>86,9</b>	<b>85,2</b>	<b>78,5</b>				

## 3. EXPORTING COUNTRIES. EXPORT SHARE BY PRODUCT

Table 3.1: Bangladesh

	1988	1990	1995	2000	2001
<b>Total exports to Denmark ,000 ECU/EURO</b>	3.655	11.087	36.976	67.472	74.957
<b>% of Denmark's apparel imports</b>	0,5	1,3	2,6	3,1	3,2

Categories where top 10 positions occupied  
(% total imports in category; ranking)

<b>Men's shirts</b>	5,2 (# 7)	8,6 (# 3)	12,1 (# 3)	9,0 (# 4)	12,6 (# 1)
<b>T-shirts</b>		8,6 (# 3)	17,0 (# 1)	14,4 (# 1)	13,5 (# 1)
<b>Pullovers</b>				4,4 (# 8)	6,2 (# 6)

Table 3.2: China

	1988	1990	1995	2000	2001
Total exports to Denmark ,000 ECU/EURO	70.145	127.323	171.941	430.804	434.565
% of Denmark's apparel imports	9,8	14,6	11,9	19,1	18,6
Categories where top 10 positions occupied (% total imports in category; ranking)					
Women's overcoats	6,8 (# 5)	10,9 (# 3)	12,9 (# 3)	24,4 (# 1)	21,9 (# 1)
Men's suits	13,5 (# 3)	3,1 (# 9)		2,0 (# 10)	1,6 (# 9)
Men's trousers	2,5 (# 10)	2,5 (# 8)	4,0 (# 8)	7,2 (# 5)	7,7 (# 5)
Women's trousers	4,9 (# 6)	5,5 (# 7)	7,9 (# 5)	10,9 (# 2)	10,4 (# 4)
Women's suits	8,2 (# 4)	13,1 (# 3)	24,3 (# 2)	20,3 (# 2)	14,6 (# 2)
Women's dresses			4,7 (# 8)	7,3 (# 5)	9,0 (# 4)
Women's skirts	4,4 (# 8)		8,1 (# 4)	24,1 (# 1)	22,3 (# 1)
Men's shirts	3,0 (# 8)	4,6 (# 8)	4,5 (# 7)	9,4 (# 3)	9,3 (# 3)
Women's blouses			5,8 (# 6)	6,3 (# 6)	5,4 (# 6)
T-shirts			6,3 (# 3)	9,4 (# 3)	9,8 (# 3)
Pullovers			7,2 (# 5)	8,8 (# 1)	8,4 (# 3)
Men's underwear	64,9 (# 1)	79,1 (# 1)	34,5 (# 1)	44,0 (# 1)	40,4 (# 1)
Women's underwear	33,2 (# 1)	48,2 (# 1)	19,3 (# 2)	32,8 (# 1)	30,2 (# 1)

Table 3.3: Germany

	1988	1990	1995	2000	2001
Total exports to Denmark ,000 ECU/EURO	74.033	76.668	127.744	126.936	145.094
% of Denmark's apparel imports	10,3	8,8	8,9	5,6	6,2
Categories where top 10 positions occupied (% total imports in category; ranking)					
Women's overcoats	14,7 (# 2)	20,3 (# 1)	15,6 (# 1)	8,2 (# 2)	9,9 (# 2)
Men's suits	17,1 (# 2)	18,5 (# 2)	40,5 (# 1)	34,6 (# 1)	31,5 (# 1)
Men's trousers	9,2 (# 5)	6,3 (# 5)	7,4 (# 6)	9,1 (# 3)	9,6 (# 2)
Women's trousers	9,5 (# 4)	8,4 (# 5)	8,3 (# 3)	5,1 (# 8)	5,4 (# 7)
Women's suits	26,7 (# 1)	21,4 (# 1)	25,3 (# 1)	5,9 (# 5)	5,5 (# 6)
Women's dresses	20,5 (# 1)	18,5 (# 2)	11,9 (# 3)	5,7 (# 8)	5,7 (# 8)
Women's skirts	15,2 (# 2)	19,1 (# 1)	14,5 (# 2)	6,6 (# 5)	6,3 (# 4)
Men's shirts	9,6 (# 3)	7,9 (# 4)	7,6 (# 5)	6,6 (# 5)	7,8 (# 6)
Women's blouses	14,7 (# 1)	19,1 (# 1)	9,8 (# 3)	3,7 (# 8)	4,0 (# 7)
T-shirts	7,5 (# 2)	8,3 (# 4)	3,5 (# 10)	3,7 (# 10)	5,0 (# 8)
Pullovers	10,8 (# 3)	8,3 (# 4)	5,4 (# 8)	4,4 (# 9)	4,2 (# 10)
Men's underwear	4,0 (# 4)	3,0 (# 3)	5,1 (# 6)	5,0 (# 5)	4,7 (# 7)
Women's underwear	5,4 (# 5)	3,2 (# 6)	16,2 (# 3)	3,1 (# 7)	3,7 (# 4)

Table 3.4: Hong Kong

	1988	1990	1995	2000	2001
Total exports to Denmark ,000 ECU/EURO	72.664	63.555	90.524	118.776	101.090
% of Denmark's apparel imports	10,1	7,3	6,3	5,3	4,3

Categories where top 10 positions occupied  
(% total imports in category; ranking)

Women's overcoats	12,2 (# 4)	12,1 (# 2)	8,1 (# 4)	6,6 (# 4)	6,5 (# 4)
Men's trousers	19,5 (# 1)	13,4 (# 4)	9,1 (# 5)	5,5 (# 7)	
Women's trousers	15,4 (# 2)	10,2 (# 2)	6,7 (# 6)	5,8 (# 6)	6,1 (# 6)
Women's suits	1,9 (# 10)				
Women's dresses	5,3 (# 5)		8,8 (# 4)	14,7 (# 1)	10,4 (# 3)
Women's skirts	6,0 (# 6)	3,1 (# 8)	4,3 (# 8)		
Men's shirts	23,5 (# 1)	19,8 (# 1)	14,8 (# 1)	16,7 (# 1)	9,3 (# 4)
Women's blouses	9,2 (# 3)	8,1 (# 5)	11,7 (# 2)	8,5 (# 4)	8,1 (# 5)
T-shirts	5,4 (# 5)	3,6 (# 9)	3,7 (# 9)	4,2 (# 8)	
Pullovers	8,5 (# 4)	8,6 (# 3)	8,2 (# 4)	4,6 (# 7)	5,2 (# 7)
Men's underwear	10,5 (# 2)	5,2 (# 2)			
Women's underwear	8,1 (# 3)	4,7 (# 3)	3,4 (# 8)		

Table 3.5: India

	1988	1990	1995	2000	2001
Total exports to Denmark ,000 ECU/EURO	11.171	19.828	48.925	64.859	68.440
% of Denmark's apparel imports	1,6	2,3	3,4	2,9	2,9

Categories where top 10 positions occupied  
(% total imports in category; ranking)

Women's overcoats		4,7 (# 7)			
Women's suits	3,8 (# 8)		1,2 (# 9)		
Women's dresses	4,9 (# 6)	6,3 (# 5)	14,5 (# 2)	11,0 (# 3)	13,2 (# 1)
Women's skirts	3,6 (# 10)	4,4 (# 7)	11,3 (# 3)	7,1 (# 3)	6,2 (# 6)
Men's shirts	5,4 (# 6)	7,0 (# 5)	10,1 (# 4)	6,4 (# 6)	9,0 (# 5)
Women's blouses	5,5 (# 7)	8,7 (# 4)	7,1 (# 4)	8,3 (# 5)	9,7 (# 3)
T-shirts		3,6 (# 7)			4,2 (# 9)
Men's underwear				4,6 (# 6)	5,0 (# 6)
Women's underwear			3,1 (# 9)	3,4 (# 5)	



<b>Table 3.6: Indonesia</b>	<b>1988</b>	<b>1990</b>	<b>1995</b>	<b>2000</b>	<b>2001</b>
<b>Total exports to Denmark ,000 ECU/EURO</b>	5.625	14.607	27.128	36.262	32.087
<b>% of Denmark's apparel imports</b>	0,8	1,7	1,9	1,6	1,4
<b>Categories where top 10 positions occupied (% total imports in category; ranking)</b>					
<b>Women's overcoats</b>		4,2 (# 8)	5,9 (# 5)	6,5 (# 5)	
<b>Pullovers</b>					4,7 (# 8)

<b>Table 3.7: Italy</b>	<b>1988</b>	<b>1990</b>	<b>1995</b>	<b>2000</b>	<b>2001</b>
<b>Total exports to Denmark ,000 ECU/EURO</b>	67.268	67.276	108.287	155.050	171.378
<b>% of Denmark's apparel imports</b>	9,4	7,7	7,5	6,9	7,4
<b>Categories where top 10 positions occupied (% total imports in category; ranking)</b>					
<b>Women's overcoats</b>				4,0 (# 8)	3,2 (# 9)
<b>Men's suits</b>	2,9 (# 8)		6,3 (# 5)	6,1 (# 4)	6,5 (# 4)
<b>Men's trousers</b>	10,1 (# 4)	16,2 (# 2)	11,4 (# 2)	17,3 (# 1)	17,5 (# 1)
<b>Women's trousers</b>	22,0 (# 1)	16,0 (# 1)	14,3 (# 1)	13,0 (# 1)	13,2 (# 1)
<b>Women's suits</b>	5,6 (# 5)	3,1 (# 8)	5,0 (# 6)	3,8 (# 7)	6,1 (# 5)
<b>Women's dresses</b>	2,6 (# 10)		4,9 (# 7)		
<b>Women's skirts</b>	3,9 (# 9)	2,3 (# 10)	3,5 (# 10)		5,2 (# 8)
<b>Men's shirts</b>	2,5 (# 10)	3,3 (# 9)			3,9 (# 10)
<b>Women's blouses</b>	5,4 (# 8)	2,8 (# 10)	2,5 (# 9)	3,5 (# 9)	3,3 (# 10)
<b>T-shirts</b>	6,1 (# 3)	3,2 (# 10)			
<b>Pullovers</b>	13,4 (# 2)	10,8 (# 2)	11,1 (# 3)	8,7 (# 2)	9,0 (# 2)
<b>Men's underwear</b>	5,0 (# 3)	1,3 (# 6)	3,4 (# 8)		
<b>Women's underwear</b>	5,4 (# 4)	3,5 (# 5)	4,1 (# 5)	2,0 (# 10)	

Table 3.8: Malaysia

	1988	1990	1995	2000	2001
Total exports to Denmark ,000 ECU/EURO	6.726	8.634	11.579	9.616	7.336
% of Denmark's apparel imports	0,9	1,0	0,8	0,4	0,3
Categories where top 10 positions occupied (% total imports in category; ranking)					
Women's suits		2,5 (# 10)			
Women's dresses		3,1 (# 7)			
Men's shirts				3,4 (# 10)	
Women's blouses	7,5 (# 6)				

Table 3.9: Mauritius

	1988	1990	1995	2000	2001
Total exports to Denmark ,000 ECU/EURO	5.446	2.426	1.194	1.923	2.338
% of Denmark's apparel imports	0,8	0,2	0,1	0,1	0,1
Categories where top 10 positions occupied (% total imports in category; ranking)					
T-shirts	5,7 (# 4)				
Pullovers	3,4 (# 8)				

Table 3.10: Morocco

	1988	1990	1995	2000	2001
Total exports to Denmark ,000 ECU/EURO	1.729	5.534	3.853	719	1.521
% of Denmark's apparel imports	0,2	0,6	0,3	0,0	0,1
Categories where top 10 positions occupied (% total imports in category; ranking)					
Women's skirts		4,9 (# 6)			

Table 3.11: Netherlands

	1988	1990	1995	2000	2001
Total exports to Denmark ,000 ECU/EURO	16.607	23.615	35.330	63.197	66.547
% of Denmark's apparel imports	2,3	2,7	2,5	2,8	2,9
Categories where top 10 positions occupied (% total imports in category; ranking)					
Women's overcoats	1,8 (# 10)			7,6 (# 3)	7,6 (# 3)
Men's suits		6,3 (# 5)			
Men's trousers		2,2 (# 9)		6,0 (# 6)	5,9 (# 8)
Women's trousers		2,5 (# 10)			
Women's dresses	3,6 (# 9)				
Men's shirts	2,6 (# 9)	2,3 (# 10)			
Women's blouses	3,3 (# 10)	4,2 (# 8)			
T-shirts	3,2 (# 9)	3,9 (# 6)			
Pullovers	4,4 (# 6)	3,2 (# 8)			
Men's underwear	0,9 (# 10)			9,0 (# 2)	3,0 (# 9)
Women's underwear			3,5 (# 7)		



Table 3.12: Portugal

	1988	1990	1995	2000	2001
<b>Total exports to Denmark ,000 ECU/EURO</b>	77.843	108.901	142.427	114.406	112.310
<b>% of Denmark's apparel imports</b>	10,9	12,5	9,9	5,1	4,8
<b>Categories where top 10 positions occupied (% total imports in category; ranking)</b>					
Women's overcoats	1,9 (# 9)	5,0 (# 6)	5,3 (# 6)		
Men's suits	8,6 (# 5)	9,5 (# 3)	4,0 (# 7)	11,8 (# 3)	25,0 (# 2)
Men's trousers	12,4 (# 2)	14,5 (# 3)	15,3 (# 2)	9,6 (# 2)	6,4 (# 6)
Women's trousers	8,6 (# 5)	9,4 (# 4)	4,7 (# 8)		
Women's suits	4,1 (# 7)	5,5 (# 6)	4,3 (# 7)		
Women's dresses	11,5 (# 3)	7,0 (# 3)	5,9 (# 6)		
Women's skirts	15,6 (# 1)	16,0 (# 2)	5,8 (# 6)	3,4 (# 10)	
Men's shirts	13,6 (# 2)	14,8 (# 2)	14,0 (# 2)	14,1 (# 2)	11,0 (# 2)
Women's blouses	3,9 (# 9)	9,0 (# 3)	5,5 (# 7)	3,5 (# 10)	3,7 (# 8)
T-shirts	21,8 (# 1)	26,5 (# 1)	15,2 (# 2)	7,8 (# 4)	8,6 (# 5)
Pullovers	21,1 (# 1)	29,4 (# 1)	13,0 (# 1)	7,0 (# 5)	7,1 (# 5)
Men's underwear	2,2 (# 5)	2,7 (# 4)	8,4 (# 3)	3,0 (# 9)	
Women's underwear	2,5 (# 6)	4,4 (# 4)	4,3 (# 4)		2,7 (# 7)

Table 3.13: Romania

	1988	1990	1995	2000	2001
<b>Total exports to Denmark ,000 ECU/EURO</b>	1.897	1.387	743	4.915	9.034
<b>% of Denmark's apparel imports</b>	0,3	0,2	0,1	0,2	0,4
<b>Categories where top 10 positions occupied (% total imports in category; ranking)</b>					

Table 3.14: Sri Lanka

	1988	1990	1995	2000	2001
Total exports to Denmark ,000 ECU/EURO	1.890	2.269	4.173	3.083	2.456
% of Denmark's apparel imports	0,3	0,3	0,3	0,1	0,1

Categories where top 10 positions occupied  
(% total imports in category; ranking)

Table 3.15: Thailand

	1988	1990	1995	2000	2001
Total exports to Denmark ,000 ECU/EURO	20.801	31.922	20.517	29.968	25.102
% of Denmark's apparel imports	2,9	3,7	1,4	1,3	1,1

Categories where top 10 positions occupied  
(% total imports in category; ranking)

Women's overcoats	3,0 (# 8)	4,1 (# 10)			
Men's suits		4,1 ( # 8)			
Men's trousers	3,2 (# 7)	1,9 (# 10)			
Women's suits	3,8 (# 9)				
Women's dresses	3,8 (# 7)				
Men's shirts	6,3 (# 5)	7,0 (# 5)	4,0 (# 9)		
Pullovers	3,3 (# 10)	3,1 (# 9)			

Table 3.16: Vietnam

	1988	1990	1995	2000	2001
Total exports to Denmark ,000 ECU/EURO		126	4.145	13.423	10.463
% of Denmark's apparel imports		0,0	0,3	0,6	0,4

Categories where top 10 positions occupied  
(% total imports in category; ranking)

Women's overcoats			4,5 (# 8)	3,3 (# 9)	3,5 (# 8)
Men's suits					1,6 (# 9)
Men's trousers	2,5 (# 10)	2,5 (# 8)	4,0 (# 8)	7,2 (# 5)	7,7 (# 5)
Women's trousers	4,9 (# 6)	5,5 (# 7)	7,9 (# 5)	10,9 (# 2)	10,4 (# 4)
Women's suits	8,2 (# 4)	13,1 (# 3)	24,3 (# 2)	20,3 (# 2)	14,6 (# 2)
Women's dresses			4,7 (# 8)	7,3 (# 5)	9,0 (# 4)
Women's skirts	4,4 (# 8)		8,1 (# 4)	24,1 (# 1)	22,3 (# 1)
Men's shirts	3,0 (# 8)	4,6 (# 8)	4,5 (# 7)	9,4 (# 3)	9,3 (# 3)
Women's blouses			5,8 (# 6)	6,3 (# 6)	5,4 (# 6)
T-shirts			6,3 (# 3)	9,4 (# 3)	9,8 (# 3)
Pullovers			7,2 (# 5)	8,8 (# 1)	8,4 (# 3)
Men's underwear	64,9 (# 1)	79,1 (# 1)	34,5 (# 1)	44,0 (# 1)	40,4 (# 1)
Women's underwear	33,2 (# 1)	48,2 (# 1)	19,3 (# 2)	32,8 (# 1)	30,2 (# 1)

Table 3.X: South Africa

	1988	1990	1995	2000	2001
Total exports to Denmark ,000 ECU/EURO			21	236	44
% of Denmark's apparel imports			0,0	0,0	0,0

Categories where top 10 positions occupied  
(% total imports in category; ranking)



# 1. SWEDEN'S APPAREL IMPORTS 1990-2001. DISTRIBUTION BY COUNTRY, GROUP OF COUNTRIES AND LEADING CATEGORIES OF APPAREL

Table 1.1: Sweden's apparel imports 1990 - 2001 (all categories)

Total imports (,000 ECU/EURO)

1990	1995	2000	2001
1.791.406	1.499.801	2.121.618	1.968.367

Leading 20 exporters ( % )

Rank	1990	1995	2000	2001
1	Portugal 16,8	China 18,3	China 14,8	China 15,1
2	Hong Kong 10,3	Denmark 10,7	Denmark 13,1	Denmark 13,2
3	Denmark 9,1	Hong Kong 8,8	Hong Kong 6,9	Italy 5,7
4	Italy 8,9	Portugal 8,4	Portugal 5,4	Hong Kong 5,6
5	Utd. Kingdom 8,2	Utd. Kingdom 8,1	Italy 5,2	Turkey 5,5
6	Finland 6,7	Italy 7,2	Bangladesh 5,0	Bangladesh 5,3
7	China 4,9	India 4,3	Turkey 5,0	Portugal 4,9
8	Greece 4,6	Fr Germany 3,1	Utd. Kingdom 3,3	Fr Germany 3,7
9	Fr Germany 4,2	Estonia 2,6	South Korea 3,3	Estonia 3,3
10	South Korea 2,8	Poland 2,1	Fr Germany 3,3	Lithuania 2,7
11	France 2,5	Norway 2,1	Estonia 3,2	Belgium 2,6
12	India 1,9	Greece 2,1	Belgium 2,9	Utd. Kingdom 2,5
13	Thailand 1,7	Finland 1,9	India 2,4	India 2,4
14	Austria 1,4	Turkey 1,8	Lithuania 2,4	South Korea 2,4
15	USA 1,4	South Korea 1,7	Greece 2,2	Latvia 2,4
16	Turkey 1,4	Bangladesh 1,5	Latvia 2,1	Greece 2,2
17	Indonesia 1,0	Latvia 1,5	Finland 2,1	Finland 2,1
18	Yugoslavia 1,0	Netherlands 1,3	Netherlands 1,9	Netherlands 2,0
19	Macao 0,9	Thailand 1,3	Thailand 1,7	Poland 1,7
20	Bangladesh 0,9	Indonesia 1,0	Poland 1,6	Thailand 1,7
	<b>TOP 10= 90,4</b>	<b>89,6</b>	<b>87,7</b>	<b>87,0</b>

Table 1.2: New countries with 1%+ of total import value

1995	2000	2001
Bangladesh	France	Romania
Estonia	Belgium	
Latvia	Lithuania	
Netherlands	Macao	
Norway		
Poland		

Table 1.3: Countries dropping out of top 20

1990 - 1995	Macao, Yugoslavia, USA, Austria and France
1995 - 2000	Indonesia and Norway
2000 - 2001	

**Table 1.4: Largest single clothing items import by value**

1990	1995	2000	2001
Women's trousers	Men's trousers	Pullovers	Pullovers
Pullovers	Pullovers	Men's trousers	Men's trousers
Men's trousers	Women's trousers	Women's trousers	Women's trousers
Women's blouses	T-shirts	T-shirts	T-shirts
T-shirts	Men's shirts	Men's shirts	Men's shirts
Men's shirts	Women's blouses	Women's underwear	Women's blouses
Women's overcoats	Women's dresses	Women's blouses	Women's underwear
Women's skirts	Women's underwear	Women's overcoats	Women's overcoats
Women's underwear	Women's skirts	Women's skirts	Women's skirts
Women's dresses	Women's overcoats	Women's dresses	Men's underwear
Men's suits	Men's underwear	Men's underwear	Women's dresses
Men's underwear	Men's suits	Men's suits	Men's suits
Women's suits	Women's suits	Women's suits	Women's suits

## 2. IMPORT PROFILES BY PRODUCT

**Table 2.1: Women's/Girls' Overcoats**

	1990	1995	2000	2001
<b>Total imports ,000 ECU/EURO</b>	82.668	50.319	75.454	64.678
<b>% of all clothing imports</b>	4,6	3,4	3,6	3,3
<b>Rank</b>				
1	Finland 28,3	China 19,1	China 17,0	China 20,2
2	China 10,2	Finland 12,0	Denmark 11,3	Denmark 12,6
3	Hong Kong 10,0	Fr Germany 10,0	Hong Kong 10,6	Hong Kong 8,7
4	South Korea 7,0	Denmark 9,5	Fr Germany 8,5	Fr Germany 7,9
5	Utd. Kingdom 6,7	Utd. Kingdom 8,6	Finland 6,7	Finland 6,5
6	Portugal 5,7	Hong Kong 8,3	Utd. Kingdom 5,4	Utd. Kingdom 5,0
7	Fr Germany 5,4	Estonia 5,2	South Korea 4,9	Romania 4,0
8	Denmark 4,2	Portugal 4,2	Indonesia 3,9	Indonesia 3,4
9	Indonesia 3,4	Vietnam 2,8	Lithuania 3,8	Bangladesh 3,3
10	Thailand 2,6	Italy 2,7	Bangladesh 3,5	South Korea 3,1
<b>Top 10 =</b>	<b>83,5</b>	<b>82,3</b>	<b>75,5</b>	<b>74,7</b>

Table 2.2: Men's / Boys' Suits

	1990	1995	2000	2001
<b>Total imports ,000 ECU/EURO</b>	34.413	17.661	25.285	21.629
<b>% of all clothing imports</b>	1,9	1,2	1,2	1,1
<b>Rank</b>				
1 Portugal	31,6	Portugal 26,4	Portugal 40,5	Portugal 26,4
2 Finland	17,3	Fr Germany 19,6	Fr Germany 13,6	Netherlands 18,2
3 Fr Germany	12,8	Hungary 14,8	Hungary 7,6	Fr Germany 13,1
4 Italy	10,3	Italy 6,9	Italy 6,5	Italy 7,4
5 Yugoslavia	7,2	Czech Rep. 4,6	Finland 5,0	Hungary 6,6
6 Romania	2,6	Finland 4,3	Czech Rep. 4,0	Finland 4,6
7 Utd. Kingdom	2,3	Norway 4,1	Slovenia 3,4	Czech Rep. 3,5
8 Greece	2,1	Slovenia 3,7	Austria 2,9	Austria 3,3
9 Hungary	1,8	Netherlands 2,8	Netherlands 2,7	Switzerland 3,3
10 Denmark	1,7	Utd. Kingdom 2,7	Malta 2,2	Denmark 2,1
<b>Top 10 =</b>	<b>89,5</b>	<b>89,9</b>	<b>88,4</b>	<b>88,5</b>

Table 2.3: Men's / Boys' Trousers

	1990	1995	2000	2001
<b>Total imports ,000 ECU/EURO</b>	150.912	196.845	239.817	240.948
<b>% of all clothing imports</b>	8,4	13,1	11,3	12,2
<b>Rank</b>				
1 Portugal	31,1	Utd. Kingdom 27,3	Portugal 13,7	Italy 14,7
2 Italy	12,1	Portugal 14,3	Italy 11,2	Portugal 11,5
3 Hong Kong	9,9	Italy 13,2	Belgium 8,5	Denmark 9,3
4 Finland	5,7	China 7,8	Denmark 7,6	Belgium 8,1
5 USA	4,9	Hong Kong 7,4	Hong Kong 6,5	Bangladesh 5,5
6 Greece	3,4	Denmark 3,7	Bangladesh 6,0	Hong Kong 5,4
7 Denmark	3,1	Latvia 2,4	Netherlands 4,9	Netherlands 4,4
8 China	3,0	Estonia 2,3	Utd. Kingdom 4,9	China 4,1
9 Utd. Kingdom	2,7	USA 2,2	China 4,4	Latvia 3,4
10 Thailand	2,4	Netherlands 2,0	Estonia 3,6	Lithuania 3,4
<b>Top 10 =</b>	<b>78,3</b>	<b>82,7</b>	<b>71,3</b>	<b>69,7</b>



Table 2.4: Women's / Girls' Trousers

	1990		1995		2000		2001	
<b>Total imports</b>								
<b>,000 ECU/EURO</b>	221.015		109.459		229.041		221.082	
<b>% of all clothing imports</b>	12,3		7,3		10,8		11,2	
<b>Rank</b>								
<b>1</b>	Utd. Kingdom	24,2	Denmark	20,4	Denmark	18,3	Denmark	18,4
<b>2</b>	Denmark	11,9	Hong Kong	12,4	Turkey	9,2	Turkey	8,8
<b>3</b>	Portugal	11,0	China	11,4	Hong Kong	9,2	China	8,5
<b>4</b>	Italy	10,4	Italy	7,9	China	8,2	Hong Kong	8,3
<b>5</b>	Hong Kong	7,9	Portugal	4,6	Bangladesh	7,2	Bangladesh	6,8
<b>6</b>	Finland	5,2	Fr Germany	4,3	Lithuania	5,8	Lithuania	5,7
<b>7</b>	Fr Germany	4,6	Turkey	3,9	Belgium	5,3	Belgium	4,7
<b>8</b>	Greece	4,5	Bangladesh	3,8	Italy	3,6	Fr Germany	3,6
<b>9</b>	France	2,8	Utd. Kingdom	3,7	Fr Germany	3,5	Italy	3,5
<b>10</b>	USA	2,2	India	3,5	Estonia	3,0	Romania	2,8
<b>Top 10 =</b>	<b>84,7</b>		<b>75,8</b>		<b>73,4</b>		<b>71,1</b>	

Table 2.5: Women's / Girls' Suits

	1990	1995	2000	2001				
<b>Total imports ,000 ECU/EURO</b>	14.811	6.092	5.246	4.473				
<b>% of all clothing imports</b>	0,8	0,4	0,2	0,2				
<b>Rank</b>								
1	Finland	22,0	Italy	23,9	Fr Germany	16,9	Italy	26,0
2	Utd. Kingdom	16,8	Fr Germany	16,0	Italy	16,7	Denmark	16,4
3	Denmark	11,6	Utd. Kingdom	15,4	Denmark	16,4	Fr Germany	13,1
4	Fr Germany	11,5	Denmark	10,7	Utd. Kingdom	10,5	China	12,1
5	France	7,6	Estonia	5,5	China	9,5	Utd. Kingdom	6,0
6	Italy	5,1	Poland	5,0	France	4,4	Hong Kong	3,3
7	Portugal	4,3	Finland	3,9	Estonia	3,7	France	3,3
8	Hong Kong	4,0	India	3,0	Thailand	2,9	Thailand	3,1
9	Poland	2,5	France	2,3	Finland	2,8	Poland	2,7
10	Netherlands	2,2	China	2,0	India	2,6	Lithuania	2,4
<b>Top 10 =</b>	<b>87,4</b>	<b>87,7</b>	<b>86,5</b>	<b>88,4</b>				

Table 2.6: Women's / Girls' Dresses

	1990	1995	2000	2001
<b>Total imports ,000 ECU/EURO</b>	34.527	59.743	47.725	34.900
<b>% of all clothing imports</b>	1,9	4,0	2,2	1,8
<b>Rank</b>				
1 Utd. Kingdom	23,4	India 26,3	Denmark 21,1	Denmark 18,4
2 Denmark	16,0	Denmark 13,6	India 14,4	India 15,0
3 Portugal	9,7	Utd. Kingdom 9,3	Utd. Kingdom 7,2	Hong Kong 7,4
4 Fr Germany	9,2	China 6,7	Hong Kong 7,0	China 7,2
5 France	8,2	Hong Kong 6,7	China 6,5	Turkey 5,6
6 Hong Kong	5,3	Estonia 4,7	Estonia 4,4	Utd. Kingdom 4,7
7 India	4,8	Fr Germany 4,3	Turkey 4,4	Fr Germany 4,1
8 Finland	3,4	Portugal 3,8	Fr Germany 3,4	Estonia 3,8
9 Italy	2,6	Greece 3,7	Finland 2,9	Finland 3,6
10 Tunisia	2,5	Turkey 3,1	Poland 2,9	Poland 3,1
<b>Top 10 =</b>	<b>85,2</b>	<b>82,2</b>	<b>74,0</b>	<b>73,0</b>

Table 2.7: Women's / Girls' Skirts

	1990	1995	2000	2001
<b>Total imports ,000 ECU/EURO</b>	76.092	52.747	62.687	53.337
<b>% of all clothing imports</b>	4,2	3,5	3,0	2,7
<b>Rank</b>				
1 Portugal	20,2	Denmark 15,0	Denmark 19,2	Denmark 21,3
2 Denmark	16,1	India 13,7	China 18,5	China 16,8
3 Fr Germany	13,1	Utd. Kingdom 12,1	Utd. Kingdom 8,1	Fr Germany 7,1
4 Utd. Kingdom	10,8	Fr Germany 9,9	Fr Germany 6,5	India 6,4
5 Finland	9,0	China 8,8	India 6,2	Turkey 5,7
6 Hong Kong	6,6	Portugal 8,4	Turkey 5,4	Lithuania 5,7
7 Italy	4,5	Estonia 4,8	Estonia 4,2	Romania 4,2
8 Greece	3,7	Hong Kong 4,7	Italy 4,0	Italy 4,1
9 India	3,7	Italy 3,1	Lithuania 3,8	Finland 3,6
10 France	2,9	Poland 2,6	Finland 3,4	Estonia 3,5
<b>Top 10 =</b>	<b>90,4</b>	<b>83,0</b>	<b>79,2</b>	<b>78,3</b>

Table 2.8: Men's / Boys' Shirts

	1990		1995		2000		2001	
<b>Total imports ,000 ECU/EURO</b>	106.968		91.673		108.272		99.350	
<b>% of all clothing imports</b>	6,0		6,1		5,1		5,0	
<b>Rank</b>								
<b>1</b>	Portugal	18,3	China	20,1	Hong Kong	14,8	Bangladesh	15,7
<b>2</b>	Hong Kong	15,4	Hong Kong	16,3	Bangladesh	14,2	China	11,6
<b>3</b>	China	10,9	Portugal	13,6	China	11,9	Hong Kong	11,3
<b>4</b>	India	10,4	India	11,7	Estonia	8,3	Estonia	8,8
<b>5</b>	Thailand	9,6	Denmark	7,8	Portugal	7,7	Portugal	8,5
<b>6</b>	Italy	4,8	Bangladesh	5,4	Denmark	7,0	Denmark	7,6
<b>7</b>	Bangladesh	4,8	Estonia	4,0	India	4,3	India	4,2
<b>8</b>	South Korea	4,4	Thailand	2,9	Turkey	2,8	Italy	3,6
<b>9</b>	Macao	2,5	Italy	2,5	Poland	2,8	Poland	3,1
<b>10</b>	Indonesia	2,3	Poland	1,9	Macao	2,7	Fr Germany	2,8
	<b>Top 10 =</b>	<b>83,5</b>		<b>86,1</b>		<b>76,5</b>		<b>77,3</b>

Table 2.9: Women's / Girls' Blouses

	1990		1995		2000		2001	
<b>Total imports ,000 ECU/EURO</b>	120.987		80.113		80.087		87.727	
<b>% of all clothing imports</b>	6,8		5,3		3,8		4,5	
<b>Rank</b>								
<b>1</b>	Hong Kong	21,2	Hong Kong	15,7	Denmark	19,8	Denmark	24,3
<b>2</b>	Utd. Kingdom	12,4	India	15,1	Hong Kong	14,0	Hong Kong	11,1
<b>3</b>	Portugal	10,8	Denmark	14,8	India	10,5	Greece	8,2
<b>4</b>	Denmark	9,6	China	10,9	China	7,3	India	7,6
<b>5</b>	Fr Germany	6,0	Utd. Kingdom	7,8	Greece	5,7	China	7,2
<b>6</b>	Finland	5,9	Estonia	5,5	Utd. Kingdom	5,7	Fr Germany	4,7
<b>7</b>	China	5,5	Fr Germany	5,0	Fr Germany	3,8	Bangladesh	3,8
<b>8</b>	India	5,4	Poland	3,9	Estonia	3,4	Romania	3,6
<b>9</b>	Greece	3,6	Portugal	3,6	Romania	3,1	Lithuania	3,1
<b>10</b>	France	3,4	Greece	2,6	Latvia	3,0	Estonia	2,8
<b>Top 10 =</b>	<b>83,8</b>		<b>84,9</b>		<b>76,3</b>		<b>76,5</b>	



Table 2.10: T-shirts

	1990	1995	2000	2001
<b>Total imports ,000 ECU/EURO</b>	109.606	104.056	227.877	212.246
<b>% of all clothing imports</b>	6,1	6,9	10,7	10,8
<b>Rank</b>				
1 Greece	19,8	China 28,7	Denmark 16,2	Turkey 15,0
2 Portugal	19,7	Greece 10,4	Turkey 13,5	Denmark 14,5
3 Denmark	8,9	Denmark 7,7	Bangladesh 12,3	Bangladesh 14,1
4 Turkey	6,4	Portugal 6,8	Greece 11,1	Greece 10,8
5 Italy	4,9	Hong Kong 6,3	China 6,8	China 5,9
6 USA	4,0	India 6,2	Hong Kong 5,4	India 5,0
7 Hong Kong	3,2	Bangladesh 5,0	India 3,8	Portugal 3,4
8 South Korea	3,1	Turkey 3,8	Portugal 3,3	Estonia 3,3
9 Utd. Kingdom	3,0	Utd. Kingdom 3,5	Lithuania 2,7	Hong Kong 3,0
10 India	2,5	South Korea 2,8	Fr Germany 2,4	Fr Germany 2,8
<b>Top 10 =</b>	<b>75,5</b>	<b>81,2</b>	<b>77,5</b>	<b>77,8</b>

Table 2.11: Pullovers

	1990	1995	2000	2001
<b>Total imports ,000 ECU/EURO</b>	214.638	171.961	282.776	253.981
<b>% of all clothing imports</b>	12,0	11,5	13,3	12,9
<b>Rank</b>				
1 Denmark	19,4	China 18,1	Denmark 15,7	Denmark 16,2
2 Portugal	13,9	Denmark 17,6	China 8,8	China 8,9
3 Italy	13,5	Hong Kong 13,6	Hong Kong 6,5	Turkey 6,8
4 Hong Kong	12,2	Italy 8,3	Bangladesh 6,0	Hong Kong 6,4
5 Greece	10,0	Portugal 6,2	Turkey 5,9	Bangladesh 6,3
6 South Korea	6,1	Utd. Kingdom 4,9	Thailand 5,6	Italy 4,6
7 Utd. Kingdom	4,6	Greece 4,1	Italy 5,1	Fr Germany 4,1
8 France	3,0	Macao 3,4	South Korea 4,8	Thailand 3,9
9 Finland	2,2	South Korea 2,5	Utd. Kingdom 3,4	South Korea 3,4
10 Fr Germany	2,2	Turkey 2,1	Belgium 3,3	Indonesia 3,3
<b>Top 10 =</b>	<b>87,2</b>	<b>80,9</b>	<b>65,1</b>	<b>63,9</b>

Table 2.12: Men's / Boys' Underwear

	1990	1995	2000	2001
<b>Total imports ,000 ECU/EURO</b>	29.074	28.981	46.426	39.978
<b>% of all clothing imports</b>	1,6	1,9	2,2	2,0
<b>Rank</b>				
1 Hong Kong	29,5	China 50,1	China 57,1	China 59,9
2 China	16,6	Hong Kong 12,0	Denmark 8,0	Denmark 7,8
3 Portugal	11,3	Portugal 4,6	Hong Kong 6,5	Hong Kong 4,9
4 Italy	8,5	Denmark 4,3	Portugal 4,2	Turkey 4,5
5 Utd. Kingdom	6,2	Pakistan 3,2	Turkey 3,5	India 3,5
6 Denmark	3,6	Norway 2,5	India 3,5	Latvia 2,8
7 Austria	2,8	Italy 2,3	Fr Germany 2,7	Portugal 2,6
8 Switzerland	2,5	Estonia 2,1	Latvia 2,5	Fr Germany 2,1
9 Pakistan	1,9	Utd. Kingdom 2,0	Utd. Kingdom 2,1	Utd. Kingdom 1,8
10 Finland	1,5	Poland 2,0	Estonia 1,3	Italy 1,3
<b>Top 10 =</b>	<b>84,4</b>	<b>85,2</b>	<b>91,4</b>	<b>91,1</b>

Table 2.13: Women's / Girls' Underwear

	1990	1995	2000	2001
<b>Total imports ,000 ECU/EURO</b>	61.916	55.622	81.641	69.815
<b>% of all clothing imports</b>	3,5	3,7	3,8	3,5
<b>Rank</b>				
1 Hong Kong	12,6	China 36,6	China 42,4	China 41,1
2 Italy	12,0	Denmark 17,5	Denmark 14,8	Denmark 15,0
3 Portugal	10,4	Hong Kong 7,2	Turkey 5,9	Turkey 8,2
4 China	10,0	Utd. Kingdom 5,7	Hong Kong 5,6	India 4,5
5 Austria	8,3	Portugal 4,8	Italy 4,5	Hong Kong 4,3
6 Utd. Kingdom	7,5	Italy 4,6	India 4,2	Italy 4,2
7 Denmark	5,9	Ireland 3,7	Portugal 3,0	Fr Germany 3,0
8 Ireland	3,4	Switzerland 2,6	Netherlands 2,6	Thailand 3,0
9 Switzerland	3,2	Pakistan 2,4	Bangladesh 2,4	Portugal 2,6
10 Greece	2,6	Turkey 2,1	Fr Germany 2,2	Bangladesh 1,4
<b>Top 10 =</b>	<b>76,0</b>	<b>87,3</b>	<b>87,7</b>	<b>87,3</b>

### 3. EXPORTING COUNTRIES. EXPORT SHARE BY PRODUCT

Table 3.1: Bangladesh	1990	1995	2000	2001
Total exports to Sweden ,000 ECU/EURO	88.133	273.827	313.504	297.807
% of Denmark's apparel imports	4,9	18,3	14,8	15,1
Categories where top 10 positions occupied (% total imports in category; ranking)				
Women's overcoats			3,8 (# 10)	3,3 (# 9)
Men's trousers			6,0 (# 6)	5,5 (# 6)
Women's trousers		3,8 (# 8)	7,2 (# 5)	6,8 (# 5)
Men's shirts	4,8 (# 7)	5,4 (# 6)	14,2 (# 2)	15,7 (# 1)
Women's blouses				3,8 (# 7)
T-shirts		5,0 (# 7)	12,3 (# 3)	14,1 (# 3)
Pullovers			6,0 (# 4)	6,3 (# 5)
Women's underwear			2,4 (# 9)	1,4 (# 10)

Table 3.2: China	1990	1995	2000	2001
Total exports to Sweden ,000 ECU/EURO	88.133	273.827	313.504	297.807
% of Sweden's apparel imports	4,9	18,3	14,8	15,1
Categories where top 10 positions occupied (% total imports in category; ranking)				
Women's overcoats	10,2 (# 2)	19,1 (# 1)	17,0 (# 1)	20,2 (# 1)
Men's trousers	3,0 (# 8)	7,8 (# 4)	4,4 (# 9)	4,1 (# 8)
Women's trousers		11,4 (# 3)	8,2 (# 4)	8,5 (# 3)
Women's suits		2,0 (# 10)	9,5 (# 5)	12,1 (# 4)
Women's dresses		6,7 (# 4)	6,5 (# 5)	7,2 (# 4)
Women's skirts		8,8 (# 5)	18,5 (# 2)	16,8 (# 2)
Men's shirts	10,9 (# 3)	20,1 (# 1)	11,9 (# 3)	11,6 (# 2)
Women's blouses	5,5 (# 7)	10,9 (# 4)	7,3 (# 4)	7,2 (# 5)
T-shirts		28,7 (# 1)	6,8 (# 5)	5,9 (# 5)
Pullovers		18,1 (# 1)	8,8 (# 2)	8,9 (# 2)
Men's underwear	16,6 (# 2)	50,1 (# 1)	57,1 (# 1)	59,9 (# 1)
Women's underwear	10,0 (# 4)	36,6 (# 1)	42,4 (# 1)	41,1 (# 1)



<b>Table 3.3: Denmark</b>	<b>1990</b>	<b>1995</b>	<b>2000</b>	<b>2001</b>
<b>Total exports to Sweden ,000 ECU/EURO</b>	162.376	160.151	277.319	260.519
<b>% of Sweden's apparel imports</b>	9,1	10,7	13,1	13,2
<b>Categories where top 10 positions occupied (% total imports in category; ranking)</b>				
<b>Women's overcoats</b>	4,2 (# 8)	9,5 (# 4)	11,3 (# 2)	12,6 (# 2)
<b>Men's suits</b>	1,7 (# 10)			2,1 (# 10)
<b>Men's trousers</b>	3,1 (# 7)	3,7 (# 6)	7,6 (# 4)	9,3 (# 3)
<b>Women's trousers</b>	11,9 (# 2)	20,4 (# 1)	18,3 (# 1)	18,4 (# 1)
<b>Women's suits</b>	11,6 (# 3)	10,7 (# 4)	16,4 (# 3)	16,4 (# 2)
<b>Women's dresses</b>	16,0 (# 2)	13,6 (# 2)	21,1 (# 1)	18,4 (# 1)
<b>Women's skirts</b>	16,1 (# 2)	15,0 (# 1)	19,2 (# 1)	21,3 (# 1)
<b>Men's shirts</b>		7,8 (# 5)	7,0 (# 6)	7,6 (# 6)
<b>Women's blouses</b>	9,6 (# 4)	14,8 (# 3)	19,8 (# 1)	24,3 (# 1)
<b>T-shirts</b>	8,9 (# 3)	7,7 (# 3)	16,2 (# 1)	14,5 (# 2)
<b>Pullovers</b>	19,4 (# 1)	17,6 (# 2)	15,7 (# 1)	16,2 (# 1)
<b>Men's underwear</b>	3,6 (# 6)	4,3 (# 4)	8,0 (# 2)	7,8 (# 2)
<b>Women's underwear</b>	5,9 (# 7)	17,5 (# 2)	14,8 (# 2)	15,0 (# 2)

<b>Table 3.4: Germany</b>	<b>1990</b>	<b>1995</b>	<b>2000</b>	<b>2001</b>
<b>Total exports to Sweden ,000 ECU/EURO</b>	75.196	46.159	69.810	71.882
<b>% of Sweden's apparel imports</b>	4,2	3,1	3,3	3,7
<b>Categories where top 10 positions occupied (% total imports in category; ranking)</b>				
<b>Women's overcoats</b>	5,4 (# 7)	10,0 (# 3)	8,5 (# 4)	7,9 (# 4)
<b>Men's suits</b>	12,8 (# 3)	19,6 (# 2)	13,6 (# 2)	13,1 (# 3)
<b>Women's trousers</b>	4,6 (# 7)	4,3 (# 6)	3,5 (# 9)	3,6 (# 8)
<b>Women's suits</b>	11,5 (# 4)	16,0 (# 2)	16,9 (# 1)	13,1 (# 3)
<b>Women's dresses</b>	9,2 (# 4)	4,3 (# 7)	3,4 (# 8)	4,1 (# 7)
<b>Women's skirts</b>	13,1 (# 3)	9,9 (# 4)	6,5 (# 4)	7,1 (# 3)
<b>Men's shirts</b>				2,8 (# 10)
<b>Women's blouses</b>	6,0 (# 5)	5,0 (# 7)	3,8 (# 7)	4,7 (# 6)
<b>T-shirts</b>			2,4 (# 10)	2,8 (# 10)
<b>Pullovers</b>	2,2 (# 10)			4,1 (# 7)
<b>Men's underwear</b>			2,7 (# 7)	2,1 (# 8)
<b>Women's underwear</b>			2,2 (# 10)	3,0 (# 7)

Table 3.5: Hong Kong	1990	1995	2000	2001
Total exports to Sweden ,000 ECU/EURO	184.138	132.339	145.695	110.051
% of Sweden's apparel imports	10,3	8,8	6,9	5,6
Categories where top 10 positions occupied (% total imports in category; ranking)				
Women's overcoats	10,0 (# 3)	8,3 (# 6)	10,6 (# 4)	8,7 (# 3)
Men's trousers	9,9 (# 3)	7,4 (# 5)	6,5 (# 5)	5,4 (# 6)
Women's trousers	7,9 (# 5)	12,4 (# 2)	9,2 (# 3)	8,3 (# 4)
Women's suits	4,0 (# 8)			3,3 (# 6)
Women's dresses	5,3 (# 6)	6,7 (# 5)	7,0 (# 4)	7,4 (# 3)
Women's skirts	6,6 (# 6)	4,7 (# 8)		
Men's shirts	15,4 (# 2)	16,3 (# 2)	14,8 (# 1)	11,3 (# 3)
Women's blouses	21,2 (# 1)	15,7 (# 1)	14,0 (# 2)	11,1 (# 2)
T-shirts	3,2 (# 7)	6,3 (# 5)	5,4 (# 6)	3,0 (# 9)
Pullovers	12,2 (# 4)	13,6 (# 3)	6,5 (# 3)	6,4 (# 4)
Men's underwear	29,5 (# 1)	12,0 (# 2)	6,5 (# 3)	4,9 (# 3)
Women's underwear	12,6 (# 1)	7,2 (# 3)	5,6 (# 4)	4,3 (# 5)

Table 3.6: India	1990	1995	2000	2001
Total exports to Sweden ,000 ECU/EURO	33.798	65.221	51.592	48.222
% of Sweden's apparel imports	1,9	4,3	2,4	2,4
Categories where top 10 positions occupied (% total imports in category; ranking)				
Women's trousers		3,5 (# 10)		
Women's suits		3,0 (# 8)	2,6 (# 10)	
Women's dresses	4,8 (# 7)	26,3 (# 1)	14,4 (# 2)	15,0 (# 2)
Women's skirts	3,7 (# 9)	13,7 (# 2)	6,2 (# 5)	6,4 (# 4)
Men's shirts	10,4 (# 4)	11,7 (# 4)	4,3 (# 7)	4,2 (# 7)
Women's blouses	5,4 (# 8)	15,1 (# 2)	10,5 (# 3)	7,6 (# 4)
T-shirts	2,5 (# 10)	6,2 (# 6)	3,8 (# 7)	5,0 (# 6)
Men's underwear			3,5 (# 6)	3,5 (# 5)
Women's underwear			4,2 (# 6)	4,5 (# 4)

<b>Table 3.7: Indonesia</b>	<b>1990</b>	<b>1995</b>	<b>2000</b>	<b>2001</b>
<b>Total exports to Sweden ,000 ECU/EURO</b>	17.506	14.671	22.219	19.435
<b>% of Sweden's apparel imports</b>	1,0	1,0	1,0	1,0
<b>Categories where top 10 positions occupied (% total imports in category; ranking)</b>				
<b>Women's overcoats</b>	3,4 (# 9)		3,9 (# 8)	3,4 (# 8)
<b>Men's shirts</b>	2,3 (# 10)			
<b>Pullovers</b>				3,3 (# 10)

<b>Table 3.8: Italy</b>	<b>1990</b>	<b>1995</b>	<b>2000</b>	<b>2001</b>
<b>Total exports to Sweden ,000 ECU/EURO</b>	158.563	107.821	110.179	111.824
<b>% of Sweden's apparel imports</b>	8,9	7,2	5,2	5,7
<b>Categories where top 10 positions occupied (% total imports in category; ranking)</b>				
<b>Women's overcoats</b>		2,7 (# 10)		
<b>Men's suits</b>	10,3 (# 4)	6,9 (# 4)	6,5 (# 4)	7,4 (# 4)
<b>Men's trousers</b>	12,1 (# 2)	13,2 (# 3)	11,2 (# 2)	14,7 (# 1)
<b>Women's trousers</b>	10,4 (# 4)	7,9 (# 4)	3,6 (# 8)	3,5 (# 9)
<b>Women's suits</b>	5,1 (# 6)	23,9 (# 1)	16,7 (# 2)	26,0 (# 1)
<b>Women's dresses</b>	2,6 (# 9)			
<b>Women's skirts</b>	4,5 (# 7)	3,1 (# 9)	4,0 (# 8)	4,1 (# 7)
<b>Men's shirts</b>	4,8 (# 6)	2,5 (# 9)		3,6 (# 8)
<b>T-shirts</b>	4,9 (# 5)			
<b>Pullovers</b>	13,5 (# 3)	8,3 (# 4)	5,1 (# 7)	4,6 (# 6)
<b>Men's underwear</b>	8,5 (# 4)	2,3 (# 7)		1,3 (# 10)
<b>Women's underwear</b>	12,0 (# 2)	4,6 (# 6)	4,5 (# 5)	4,2 (# 6)



**Table 3.9: Malaysia**

	1990	1995	2000	2001
Total exports to Sweden ,000 ECU/EURO	11.077	4.750	4.102	2.477
% of Sweden's apparel imports	0,6	0,3	0,2	0,1

Categories where top 10 positions occupied  
(% total imports in category; ranking)

**Table 3.10: Mauritius**

	1990	1995	2000	2001
Total exports to Sweden ,000 ECU/EURO	3.833	2.251	6.121	6.192
% of Sweden's apparel imports	0,2	0,2	0,3	0,3

Categories where top 10 positions occupied  
(% total imports in category; ranking)

<b>Table 3.11: Morocco</b>	<b>1990</b>	<b>1995</b>	<b>2000</b>	<b>2001</b>
<b>Total exports to Sweden ,000 ECU/EURO</b>	1.654	283	1.280	627
<b>% of Sweden's apparel imports</b>	0,1	0,0	0,1	0,0
<b>Categories where top 10 positions occupied (% total imports in category; ranking)</b>				

<b>Table 3.12: Netherlands</b>	<b>1990</b>	<b>1995</b>	<b>2000</b>	<b>2001</b>
<b>Total exports to Sweden ,000 ECU/EURO</b>	12.690	19.044	41.037	40.259
<b>% of Sweden's apparel imports</b>	0,7	1,3	1,9	2,0
<b>Categories where top 10 positions occupied (% total imports in category; ranking)</b>				
<b>Men's suits</b>		2,8 (# 9)	2,7 (# 9)	18,2 (# 2)
<b>Men's trousers</b>		2,0 (# 10)	4,9 (# 7)	4,4 (# 7)
<b>Women's suits</b>	2,2 (# 10)			
<b>Women's underwear</b>			2,6 (# 8)	

Table 3.13: Portugal	1990	1995	2000	2001
Total exports to Sweden ,000 ECU/EURO	301.404	126.619	113.625	95.522
% of Sweden's apparel imports	16,8	8,4	5,4	4,9
Categories where top 10 positions occupied (% total imports in category; ranking)				
Women's overcoats	5,7 (# 6)	4,2 (# 8)		
Men's suits	31,6 (# 1)	26,4 (# 1)	40,5 (# 1)	26,4 (# 1)
Men's trousers	31,1 (# 1)	14,3 (# 2)	13,7 (# 1)	11,5 (# 2)
Women's trousers	11,0 (# 3)	4,6 (# 5)		
Women's suits	4,3 (# 7)			
Women's dresses	9,7 (# 3)	3,8 (# 8)		
Women's skirts	20,2 (# 1)	8,4 (# 6)		
Men's shirts	18,3 (# 1)	13,6 (# 3)	7,7 (# 5)	8,5 (# 5)
Women's blouses	10,8 (# 3)	3,6 (# 9)		
T-shirts	19,7 (# 2)	6,8 (# 4)	3,3 (# 8)	3,4 (# 7)
Pullovers	13,9 (# 2)	6,2 (# 5)		
Men's underwear	11,3 (# 3)	4,6 (# 3)	4,2 (# 4)	2,6 (# 7)
Women's underwear	10,4 (# 3)	4,8 (# 5)	3,0 (# 7)	2,6 (# 9)

Table 3.14: Romania	1990	1995	2000	2001
Total exports to Sweden ,000 ECU/EURO	2.438	9.173	20.768	27.520
% of Sweden's apparel imports	0,1	0,6	1,0	1,4
Categories where top 10 positions occupied (% total imports in category; ranking)				
Women's overcoats				4,0 (# 7)
Men's suits	2,6 (# 6)			
Women's trousers			2,8 (# 10)	
Women's skirts			4,2 (# 7)	
Women's blouses			3,1 (# 9)	3,6 (# 8)



<b>Table 3.15: Sri Lanka</b>	<b>1990</b>	<b>1995</b>	<b>2000</b>	<b>2001</b>
<b>Total exports to Sweden ,000 ECU/EURO</b>	9.557	7.216	5.282	4.218
<b>% of Sweden's apparel imports</b>	0,5	0,5	0,3	0,2
<b>Categories where top 10 positions occupied (% total imports in category; ranking)</b>				

<b>Table 3.16: Thailand</b>	<b>1990</b>	<b>1995</b>	<b>2000</b>	<b>2001</b>
<b>Total exports to Sweden ,000 ECU/EURO</b>	30.043	18.809	36.553	33.237
<b>% of Sweden's apparel imports</b>	1,7	1,3	1,7	1,7
<b>Categories where top 10 positions occupied (% total imports in category; ranking)</b>				
<b>Women's overcoats</b>	2,6 (# 10)			
<b>Men's trousers</b>	2,4 (# 10)			
<b>Women's suits</b>			2,9 (# 8)	3,1 (# 8)
<b>Men's shirts</b>	9,6 (# 5)	2,9 (# 8)		
<b>Pullovers</b>			5,6 (# 6)	3,9 (# 8)
<b>Women's underwear</b>				3,0 (# 8)

<b>Table 3.16: Thailand</b>	<b>1990</b>	<b>1995</b>	<b>2000</b>	<b>2001</b>
<b>Total exports to Sweden ,000 ECU/EURO</b>	30.043	18.809	36.553	33.237
<b>% of Sweden's apparel imports</b>	1,7	1,3	1,7	1,7
<b>Categories where top 10 positions occupied (% total imports in category; ranking)</b>				
<b>Women's overcoats</b>	2,6 (# 10)			
<b>Men's trousers</b>	2,4 (# 10)			
<b>Women's suits</b>			2,9 (# 8)	3,1 (# 8)
<b>Men's shirts</b>	9,6 (# 5)	2,9 (# 8)		
<b>Pullovers</b>			5,6 (# 6)	3,9 (# 8)
<b>Women's underwear</b>				3,0 (# 8)

<b>Table 3.17: Vietnam</b>	<b>1990</b>	<b>1995</b>	<b>2000</b>	<b>2001</b>
<b>Total exports to Sweden ,000 ECU/EURO</b>	1.143	5.899	12.501	10.812
<b>% of Sweden's apparel imports</b>	0,1	0,4	0,6	0,5
<b>Categories where top 10 positions occupied (% total imports in category; ranking)</b>				
<b>Women's overcoats</b>		2,8 (# 9)		

Table 3.X: South Africa

	1990	1995	2000	2001
Total exports to Sweden ,000 ECU/EURO	4	73	1.029	3.773
% of Sweden's apparel imports	0,0	0,0	0,0	0,2

Categories where top 10 positions occupied  
(% total imports in category; ranking)



### **Mauritius**

Although five of the ten companies interviewed had sourced from Mauritius in the past, in all except one case this had ceased before the interviewee had joined the company.

The one company (a mid-market chain) still sourcing from Mauritius stated 'they've been dependent on Lomé, they're not especially cheap and the lead times are long. We think that the firms there have high overheads. The firms that we're working with there have very high proportions of foreign contract labour and it makes us nervous. There's some kind of campaign around it in the US. So now we're cautious about it, although it's a good base to explore other places from'.

Another company had undertaken a serious survey in Madagascar ('Mauritius's backyard'): 'we found it expensive, we found long lead times and most capacity was booked for the US. We needed suppliers who could come on stream in a hurry. The file is now closed.'

### **Vietnam**

Seven of the 10 companies interviewed had sourced some garments from Vietnam and a eighth was considering doing so. A ninth had considered doing so but then rejected the idea: '(we understood that) the prices aren't any better than Bangladesh, the quality is low and that they are interested mainly in big volumes.'

Of the seven companies which had sourced there, none were greatly enthusiastic. Two had withdrawn completely and a third had decided not to follow-up a trial order. Reasons given for withdrawal were in one case that the quota system worked poorly and in the other that 'it isn't as competitive as other Far Eastern markets'. Two of the three companies for which Vietnam remained an origin were sourcing through Hong Kong companies with capacity located in Vietnam for quota reasons. They sourced from these companies ('their quality is the same wherever they do it') rather than from Vietnam as such, and one was sceptical whether the industry would remain there after the abolition of the quota system.

### **South Africa**

Only one company had any knowledge of the South African market. Two others commented on the complete lack of enquiries received from suppliers there and another mentioned that Africa generally was uninteresting to them for reasons of political instability.

The company with knowledge of the market had done a survey and placed trial orders, both in South Africa itself and in Botswana. These countries were being considered as sources of supply for the company's US rather than European stores, but Mexico was being considered much more seriously. Mexico had a very clear advantage in terms of lead times, while South



Africa and Botswana 'don't offer us much at all, either on price, lead time, quality or fashionability. They are bad on all four... We're still looking at it... We'll follow it, we'll give them some more small orders but we won't open an office there, at least not yet...'



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