



Country and Sector Presentation

Textile Sector in Bosnia and Herzegovina

APPAREL SOURCING - SEMINAR SERIES

MUNICH FABRIC START – MANUFACTURING

Munich, 03 – 04. September 2019



Hall 8 / C 02





Textile Sector in Bosnia and Herzegovina

General Characteristics

- ✓ **Women-dominatad and labour-intensive industry**
- ✓ **Export-oriented industry**
- ✓ **80% - 90% „lohn“ business**
- ✓ **Number of companies: 320**
- ✓ **Number of employees: 20.000 (2,5 - 3% of total labour)**
- ✓ **Production programme:**
 - high fashion menswear and womenswear,
 - sportswear,
 - fine lingerie and sleepwear,
 - safety, work wear and protective equipment,
 - seat covers,
 - corporate clothing,
 - home textile products & carpets





Textile Sector in Bosnia and Herzegovina

Advantages

- ✓ **Tradition**
- ✓ **Proximity to EU markets**
- ✓ **Flexibility**
- ✓ **Possibility of production of small volumes/quantities**
- ✓ **Skilled labour**
- ✓ **Competitive labour costs**
- ✓ **Modern Technology and Know-How**





Textile Sector in Bosnia and Herzegovina





VANJSKOTRGOVINSKA KOMORA BOSNE I HERCEGOVINE
СПОЉНОТРГОВИНСКА КОМОРА БОСНЕ И ХЕРЦЕГОВИНЕ
FOREIGN TRADE CHAMBER OF BOSNIA AND HERZEGOVINA

Textile Sector in Bosnia and Herzegovina



Olimpijski komitet Bosne i Hercegovine



NUMBER 1





FREE TRADE AGREEMENTS



European Union



CEFTA



Turkey



EFTA

PREFERENTIAL TRADE AGREEMENTS

USA, Canada, Japan, Iran, Australia, New Zeland





Foreign Trade in Textile Products 2014 - 2018 (mil EUR)

EXPORT OF TEXTIL & APPAREL INDUSTRY IN B&H IN PERIOD 2014 - 2018 (mil. EUR)						
Tariff Head (HS) 50 - 63; 65	2014	2015	2016	2017	2018	TOTAL
Total Textil & Apparel	225	262	270	301	333	1.391
Total B & H	4.571	4.712	4.995	5.821	6.268	26.367





Foreign Trade in Textile Products 2014 - 2018 (mil EUR)

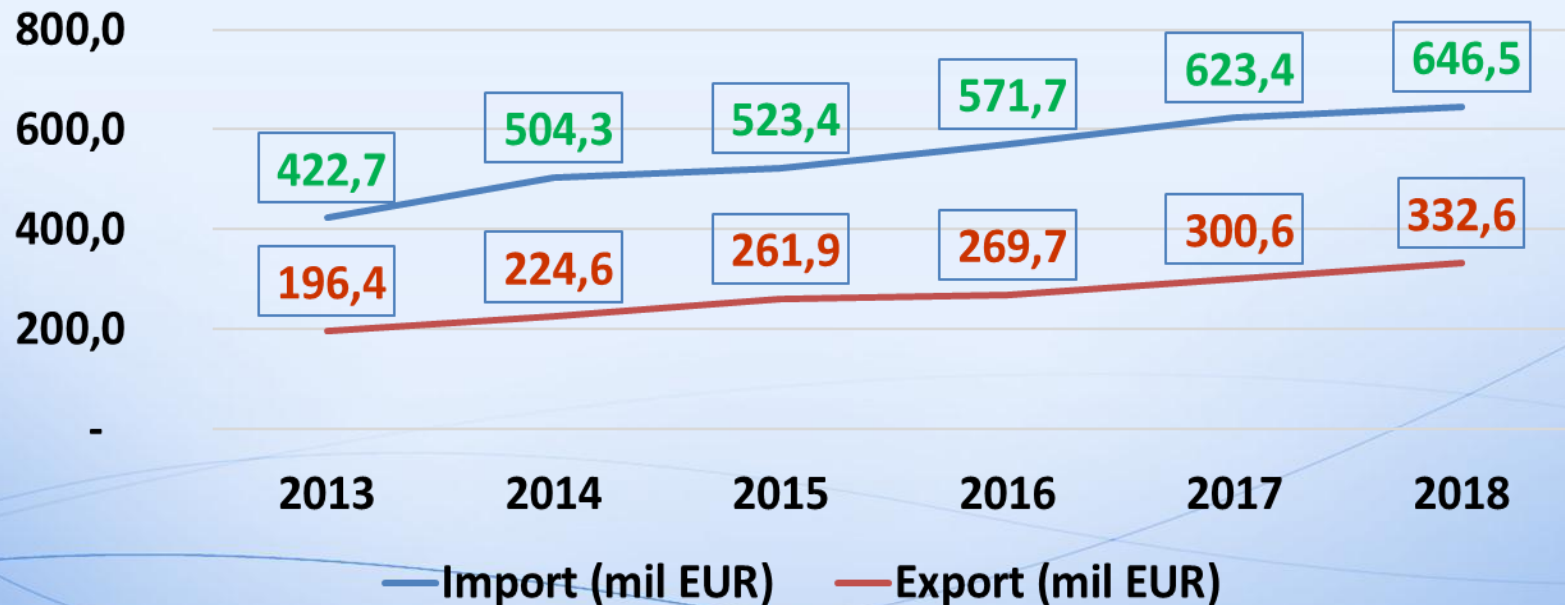
IMPORT OF TEXTIL & APPAREL INDUSTRY IN B&H IN PERIOD 2014 - 2018 (mil. EUR)						
Tariff Head (HS) 50 - 63; 65	2014	2015	2016	2017	2018	TOTAL
Total Textil & Apparel	504	526	572	623	647	2.872
Total B I H	8.073	7.875	8.314	9.432	10.180	43.874





Trends in Foreign Trade of Textile Products in B&H

Trend in Foreign Trade of textile products
2013 - 2018





Export of Textile Products in 2018 (per Country)

Country	EUR	% of total export
Germany	107.787.080	32,40%
Italy	82.468.076	24,80%
Austria	32.120.706	9,66%
Croatia	24.349.609	7,33%
Poland	23.127.905	6,95%
Slovenia	13.996.711	4,21%
France	11.509.536	3,46%
Serbia	7.546.348	2,27%
Switzerland	6.053.411	1,82%
Czech Republic	6.017.445	1,81%
Top 10 Countries - Total	314.976.827	94,70%
All countries - Total Export	332.589.439	100%





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Export of Textile Products in 2018 (per product groups)

HS	PRODUCT NAME	Mill. EUR
62	Articles of apparel and clothing accessories, except knitted crochets	181.4
61	Clothing and accessories, knitted or crocheted.	95.2
63	Other made-up textile articles, sets, cost. clothes	13.3
59	Textile fabrics, impregnated, coated	11.7
55	Synthetic or synthetic fibers	11.2
52	Cotton	7.3
54	Artificial or synthetic filaments	3.6
60	Knitted or crocheted fabrics	2.5
65	Hats, caps and other headgear	2.2
58	Special fabrics, tufted fabrics, lace ..	1.5
TOP 10 Export products in 2018 / TOTAL		329.7
% of total Exports		99,12 %
Export of textile products in 2018 / TOTAL		332.6





Import of Textile Products in 2018 (per product groups)

HS	PRODUCT NAME	Mill. EUR
62	Articles of apparel and clothing accessories, except knitted crochets	124.6
61	Clothing and accessories, knitted or crocheted.	100.4
59	Textile fabrics, impregnated, coated	72.3
60	Knitted or crocheted fabrics	55.2
54	Artificial or synthetic filaments	55.5
55	Synthetic or synthetic fibers	49.8
56	Wadding, felt and non-woven mat., spec. yarn	42.8
63	Other made-up textile articles, sets, cost. clothes	37.3
52	Cotton	31.8
58	Special fabrics, tufted fabrics, lace ..	25.4
TOP 10 Import products in 2018 / TOTAL		595.1
% of total Imports		92,05 %
Import of textile products in 2018 / TOTAL		646.5





Textile Sector in Bosnia and Herzegovina

Top Advantages of B&H companies

- ✓ Long tradition of clothing production,
- ✓ High quality of products and services,
- ✓ Modern Technology and Know-How
- ✓ Good international reputation as a supplier and manufacturer
- ✓ Flexibility and possibility of production in small volumes
- ✓ Skilled labour
- ✓ Competitive production and labour costs
- ✓ Proximity to EU markets





The Companies represented at this Fair





Number of employees: 31

Products: **Blazer, Trousers, Shirts, T-shirts, Blouses, Dresses, Skirts, Vest, Coats, Jackets, Sweaters (fashion department) and uniforms (Corporate department).**

Certificates: ISO 9001:2008

www.bellissima.ba

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BONTEX

Number of employees: 250

Products: **men's wear** (shirts, jackets, work wear/protective, light work wear, jersey, t-shirts, sweatshirts, underwear), **ladies' wear** (shirts, blouses, skirts, dresses, denim, other)

Certificates: BSCI, ISO, FairWear, SA 8000

www.bontex.ba

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Number of employees: 300

Products: **men, ladies and children
light confection and traditional
Bavarian clothes**

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prevent.

Number of employees: 425

Products: **men's clothing for foreign markets and top fashion brands like suits, blazers, coats, jackets, skirts, pants, dresses, shirts**

Certificates: ISO 9001

www.prevent.ba

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ZENKO

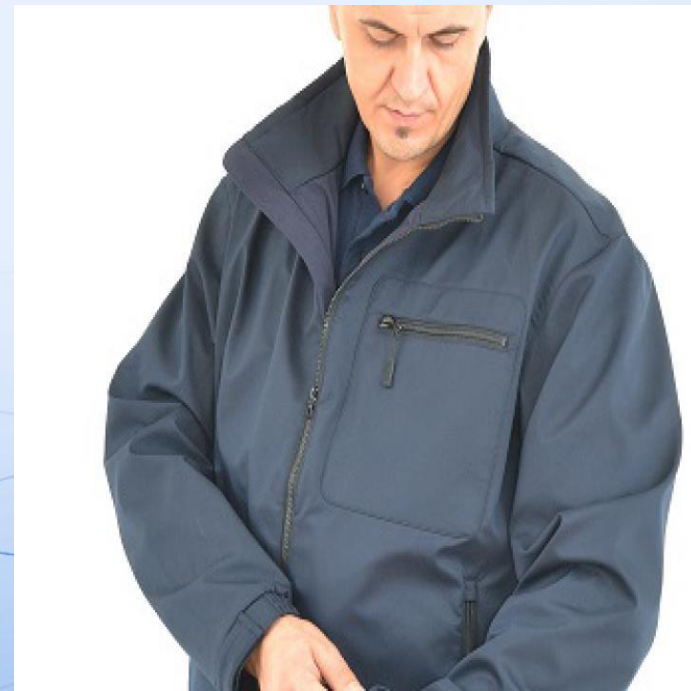
Number of employees: 90

Products: **work wear, safety and protective equipment, corporate clothing, police and army uniforms**

Certificates: ISO 9001-2015;
ISO 14001-2015;
BSCI Code of conduct;
CE certificate EN 20471, EN 343,

www.zenko.ba

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THANK YOU FOR ATENITION

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