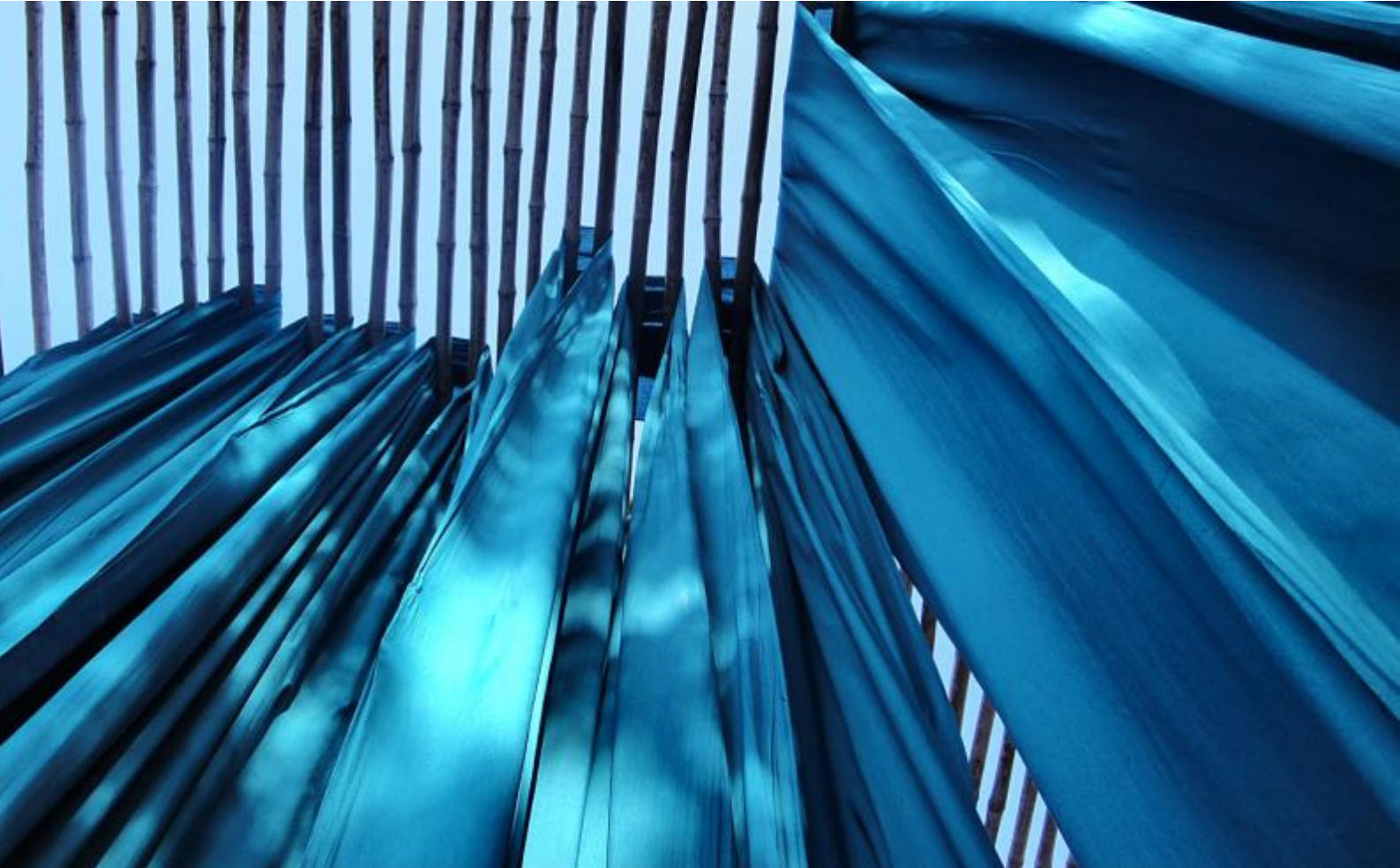


# **Boosting Indian Exports of Textiles & Clothing to Denmark – A Roadmap**



सत्यमेव जयते

**Investments, Technology Promotion &  
Energy Security (ITP & ES) Division  
Ministry of External Affairs**



#### Disclaimer

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## Abbreviations

T&C	Textiles and clothing
RMG	Ready-made garments
MMF	Man-made fibers
PPI	Producer price index
GDP	Gross domestic product
DKK	Danish kroner
USD	US dollars

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## Executive Summary

The value of Indian exports to Denmark has declined between 2011 and 2016. Textiles and clothing are major products traded between the two countries, especially from the point of view of Indian exports. This sector contributes 14% to India's industrial production, 4% to GDP and makes up 15% of its exports earnings (Make in India, 2016). Yet, the value of Danish T&C imports from India has declined from well over DKK 2 billion in 2011 to just over DKK 1.6 billion in 2016 (Statistics Denmark, 2016).

Although in recent years, the global T&C industry has witnessed a 'race to the bottom' due to changing industry dynamics, countries such as Bangladesh, Vietnam and Cambodia have anticipated and adapted to these changes and thus managed to either maintain or in some cases even increase their exports in this sector. India too has been increasing its overall exports of e.g. clothing, yet its T&C exports to Denmark has declined. Furthermore, countries, such as Pakistan and Bangladesh enjoy certain custom duty benefits that make their products more attractive to Danish buyers from a cost perspective. With these challenging industry dynamics and the fact that the T&C sector is the backbone of Indian exports to Denmark, it is vital and timely to have a deeper analysis as to why India is losing its share of the market to competing countries and conceive a plan to reverse the trend.

The report, which is a combination of primary and secondary research attributes the declining figures of exports of Indian T&C to Denmark to a variety of issues. The main issues identified amongst others include a lack of awareness by Indian exporters about the demands of the Danish market, poor quality of Indian goods and most importantly the cost of Indian goods, given a very price elastic market. Thus, a strategic approach is required by the Indian exporters and export promotion agencies towards the moderate yet lucrative Danish market, especially given its crucial location as a focal point for trade in Northern Europe, and with some of the largest companies in the sector based in and around Denmark.

The report provides recommendations for boosting exports of Indian textiles and clothing to Denmark by taking a strategic approach – one that prepares key stakeholders on both sides for the opportunities and challenges of each market, connects these stakeholders and eventually creates a platform for boosting and sustain the exports of T&C to Denmark. The report provides specific recommendations to Indian exporters to be more competitive in the Danish market. These recommendations have been further translated into road map to be implemented by the Indian Embassy in Denmark. The road map is composed of three overarching themes, all of which are progressive and inclusive rather than being linear and exclusive. These themes are broadly defined as 'Prepare, Connect and Sustain' (PCS), which will help the Indian Embassy achieve its ambition of boosting Indian exports of textile and clothing to Denmark. The themes may be prioritized by the Embassy depending on factors such as time, cost resources and impact.

## Chapter 1 – Introduction

This report investigates the drivers of textiles and clothing exports to Denmark, with the aim to provide recommendations for increasing Indian exports of T&C and better positioning Indian brands in the Danish fashion market. India is the world's second largest textile exporter and fourth largest exporter of clothing, yet it currently ranks 6th among exporters of textiles and clothing (T&C) to Denmark specifically (World Bank, u.d.). Meanwhile, trade between the two nations has been decreasing. Indian exports to Denmark fell by 26% between 2014 and 2015, and Danish exports to India decreased by 12% during the same period. However, there is an enormous opportunity to increase trade between the two countries, considering factors such as India's strong growth rates of more than 7% and the strength and stability of the Danish economy.

The T&C industry is undergoing fundamental changes in both production and consumption patterns. New market trends, consumer demands and technologies pose both challenges and opportunities for exporters, and this report seeks to understand how Indian suppliers can address the challenges and tap into the opportunities by playing to its strengths. The fashion and garments industry is important in Denmark too, from a consumer perspective. Annual household consumption of clothes and other textiles rose in economic terms by 30% between 2000 and 2010, while clothing became cheaper in the same period, indicating a rise in the volume consumed. The industry is a heavy source of pollution as well. In the EU, textiles are the fourth most environmentally damaging sector after the housing, transportation and food industries (Norden, 2015). Due to this heavy impact, sustainability has become a main driver of trends and consumption both in Denmark and the Nordics and gaining momentum worldwide.

The fashion industry is a trendsetter for both consumers and producers of T&C. Danish consumers are particularly aware of their environmental footprints, while at the same time demanding easy access to global shopping opportunities, facilitated by technology. Indian exporters of T&C to Denmark will need to consider fast-changing fashion trends and consumer demands for sustainable production methods, while competing on price.

Indian T&C producers thus face an array of factors affecting their opportunities for increasing exports to Denmark, in fierce competition with leading exporting nations such as China, Bangladesh and Pakistan. It is the ambition of this report to help Indian exporters of textiles and clothing better understand the drivers of fashion consumption and exports to Denmark. By identifying and analytically breaking down these market drivers, the report will convert in-depth market knowledge into strategic, yet tangible, recommendations for better positioning Indian brands and products among

Danish consumers to increase exports. In the following section an overview of the report structure and methodology is provided.

## 1.1 Report structure & methodology

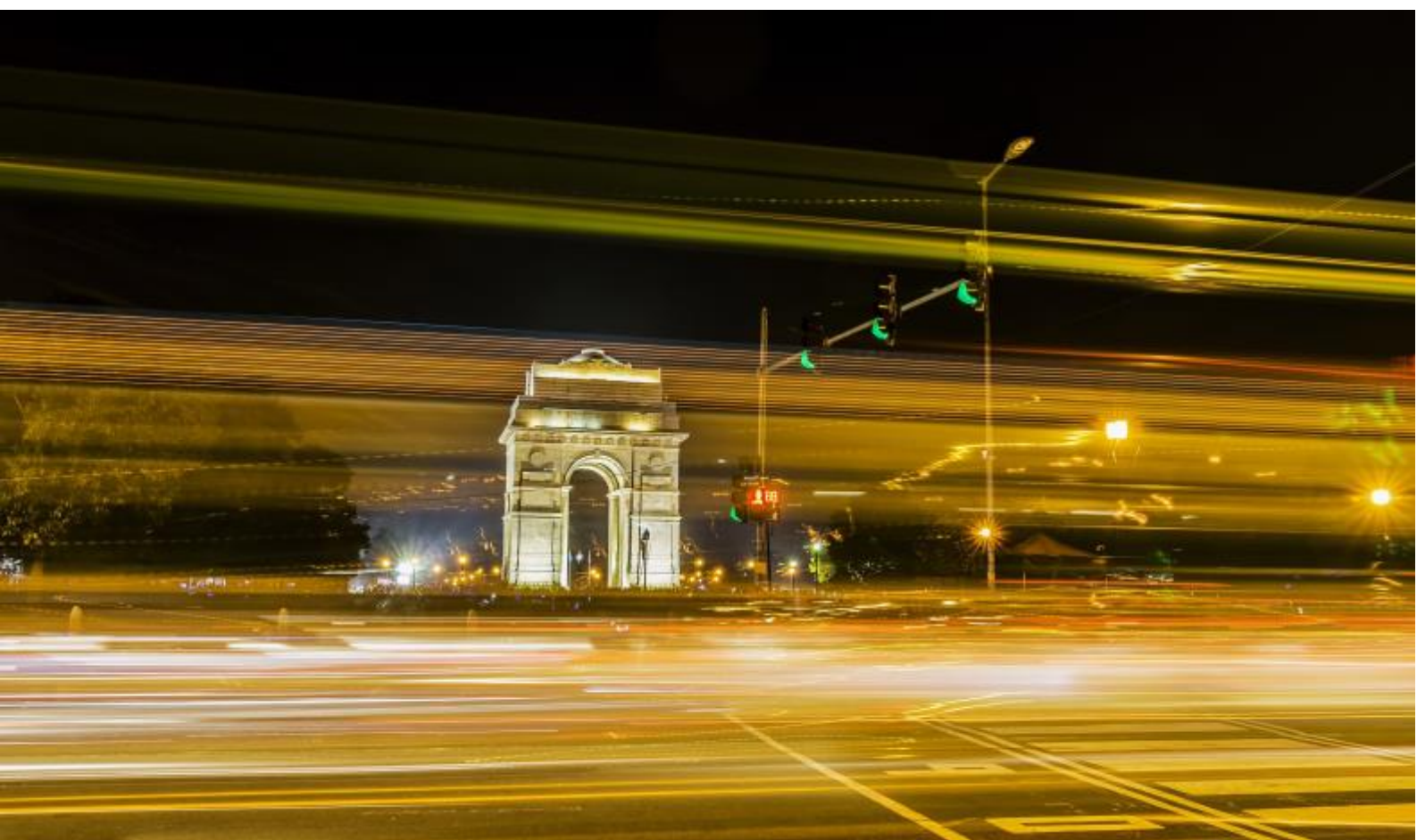
The report is structured to provide first an overview of the global T&C market and what drives the main future trends. This is followed by an analysis of India's main regional competitors, to identify and compare their policies and strategic approaches for enhancing exports of T&C and strengthening competitiveness. The first two sections thus serve to frame the report's main investigation, which analyzes in-depth the trade relationship between India and Denmark. In the main investigation, trade volume, the Danish value chain and Indian supply chain are discussed, while key stakeholders are mapped out. Here, the primary research, based on interviews with relevant Indian and Danish industry stakeholders, is presented and analyzed using the SWOT model.

The final part of the report draws on both the initial desk research on competitors and the global industry and the primary research of the supply and value chains to form its recommendations. This is done in two parts. First, strategic recommendations are given for Indian suppliers of T&C to the Danish market, and second, a roadmap is created for the Indian Embassy to use for implementing and working proactively with the strategic recommendations.

The report methodology is based on a mixed-methods approach. It engages the subject of Indian exports of T&C to Denmark by compiling both qualitative and quantitative information from desk research and combining it with in-depth, qualitative data collection from personal interviews. This triangulation of data sources is applied to ensure that an exhaustive analysis can be performed for a complete understanding, on which to base the recommendations. It also helps verify information gathered and to add context and perspective to the data collection from interviews.

While a certain amount of quantification has been applied to the research to better present and communicate the findings, the report remains highly qualitative in its scope. Based on the preliminary findings from the initial desk research phase, interviews with 27 key stakeholders in the Danish value chain have been conducted to obtain first-hand information about the drivers and barriers for growth between Denmark and India. The process and methodology of the report is illustrated below.





## **Chapter 2 – Global Drivers & Industry Trends**

### **2.1 Overview**



In 2016 Textile & Clothing (T&C) output sales decreased by 1.5%, due in large part to moderate average global growth below the +3% mark and a protracted, lower-than-tolerated demand. Thus, T&C producer prices decreased in every country bar China, for which they remained just stable. The Producer Price Index (PPI) thus shed 1.2% for the United States and 1.8% for India.

Consequently, international trade, which accounts for a third of total T&C output, lost USD 40bn worth of business. Additionally, a protectionist mood and the termination of the Trans-Pacific Partnership by the US may land a blow to the global Textiles & Clothing industry, which is already hampered by high tariffs and regulations that impede sector growth (Euler Hermes, 2017).

According to the WTO World Trade Statistics 2016, India was the world's second largest exporter of textiles and the fifth largest exporter of clothing in 2015 (not counting the EU as a single exporter). See figures 2.1 and 2.2 from the WTO report below.

Figure 2.1 - WTO top 10 exporters of textiles

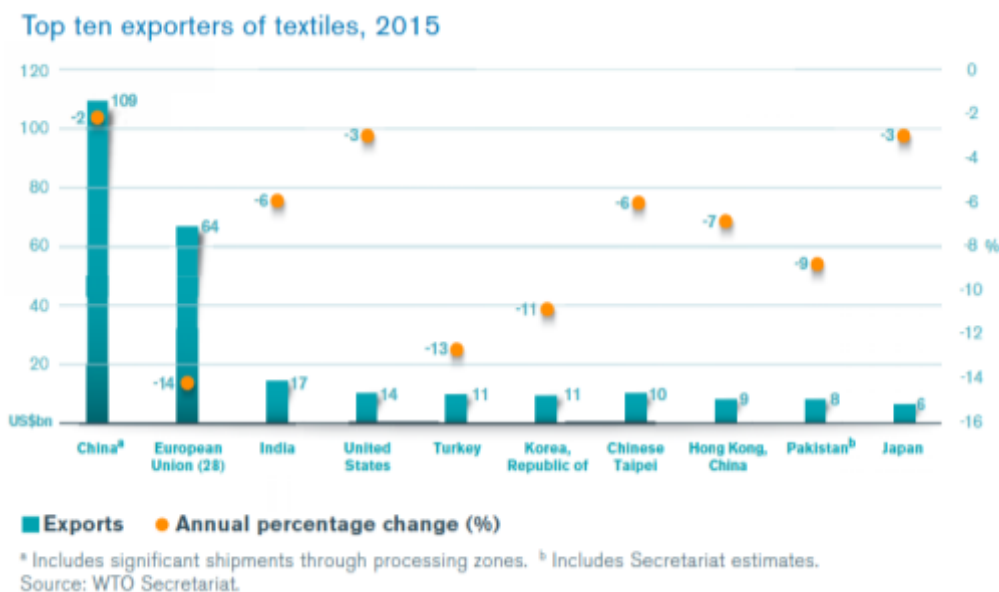


Figure 2.2 - WTO top 10 exporters of clothing



As can be seen, India registers a negative annual change in exports of textiles of 6% and a positive change of 2% of clothing in 2015. This is representative of the entire industry, with exports of textiles declining across the board. However, exports of clothing are increasing for Bangladesh, Vietnam, India and Cambodia, while China, The European Union and Turkey registered negative export growth (Euler Hermes, 2017).

## 2.2 Drivers & Trends

Economic research by Euler Hermes, a consultancy, has identified key strengths and weaknesses in the T&C industry currently supporting and challenging producers and exporters:

- Resilient long-term demand due to rising middle classes in emerging markets
- Steady supply prices due to manmade fibers, whose prices are less volatile than e.g. cotton or wool
- Profitability undermined by volatile prices on raw materials and rising wages
- Strong competition weighing in on margins, which are further stressed by e-commerce activities
- Changing consumer trends, such as fast fashion, forces the T&C industry to become more flexible

A changing global environment will create new demands and opportunities for suppliers in the T&C industry. According to Forum for the Future, a global non-profit for business and sustainability, three main factors already shape the global fashion industry (Forum for the Future, 2010) and are expected to create a shift in mentality among both consumers and producers of textiles and clothing:

- **Resources**  
Climate change, population growth and shortages of key resources will pose challenges for the way textiles and clothing is produced – and create new opportunities for producers. The focus is shifting away from natural materials such as cotton or wool in favor of manmade fibers (MMF), as prices are volatile for natural raw materials.
- **Attitude**  
People's attitudes towards resource scarcity, climate change and sustainability and their levels of disposable income will affect consumer demand. Trends like fast-fashion challenges the industry to deliver in new ways for the speed-obsessed global shopper.
- **Technology**  
Technology will continue to transform people's lives and the way fashion is consumed and produced. It is at once a challenge and immense opportunity for T&C producers to engage with customers and business stakeholders, including opportunities within e-commerce and marketing.

The textiles and clothing industry is poised to play a vital role in fostering sustainable development, as it exercises an enormous influence on society and the economy through its marketing, customer transactions and complex global supply chains. For years, the industry 'raced to the bottom' because of strong competition and a lack of supply chain transparency, which drove down both costs and environmental and social standards (Forum for the Future, 2010).

However, the industry has already demonstrated a capacity for change. Factory conditions and labor standards for textiles production has long been in focus, with retailers adopting codes of conduct for their suppliers. The fashion industry arguably has an opportunity to leverage its powerful marketing and trend-setting clout, to make sustainability desirable, and this will be a massive driver for T&C producers worldwide.



## Chapter 3 – Competitor Countries

This chapter provides an overview of the policies and strategies of India's main competitors in the textiles and clothing industry, with the aim to better understand different approaches to exports. The chapter thus reviews the official policies and export strategies of China, Bangladesh and Pakistan adopted to promote and support their respective local textile and garments industries both domestically and internationally. The chapter concludes by summarizing the findings in a matrix and deducing recurrent approaches for enhancing exports.

### 3.1 China

China's approach to exports of textiles and garments is guided by two main national strategies and policies. The first is the 13th Five Year National Plan,



which is the overarching national development plan for 2016-2020 (Central Committee of the Communist Party of China, 2016). This comprehensive economic and social development plan is China's guiding strategy, which includes policy initiatives for development of its main industries, support programs for export promotion, international demonstration projects and much more. The second is the Adjustment and Revitalization Plan of Textile Industry 2011-2020, launched in April 2012 (Fibre2Fashion, u.d.), which has sought to revitalize the Chinese textiles industry through a variety of strategic initiatives.

From 2016 through 2020 the 13th Five Year National Plan will help support demonstration projects, guide enterprises and develop domestic international clusters to promote Chinese interests and exports. This will be achieved by:

- Increasing the level of international cooperation in economic and technological development zones.
- Setting up a repository for production capacity cooperation projects and promoting major demonstration projects.
- Guiding enterprises in participating in international markets.
- Developing industrial clusters overseas suitable to local conditions.
- Putting in place mechanisms to facilitate overall coordination and communication that involve the participation of enterprises, financial institutions, local governments, chambers of commerce and industry associations.
- Promoting a transformation in foreign trade toward better quality exports that command higher prices.
- Establishing systems to facilitate new forms of trade, such as cross-border e-commerce, comprehensively implementing the Single Window System, one-stop service and the integration of regional customs clearance procedures.
- Giving play to the roles of chambers of commerce, industrial associations, and trade and investment promotion agencies.

Furthermore, the Adjustment & Revitalization Plan aims to:

- Expand export diversity as a way to stabilize & strengthen China's international market share.
- Eliminate obsolete capacity, reduce energy consumption and increase efficiency in the domestic textile industry.
- Provide more financial support for the industry. The Government has raised the export tax rebate rate from 14% to 15% in the plan.
- Encourage financial institutions to provide credit guaranty and financial support to small and medium sized textile enterprises.

### **3.2 Bangladesh**

The Bangladesh Export Policy of 2012-2015 (Embassy of Bangladesh, u.d.) (the latest available and currently valid policy document) sets the strategic direction for exports. Overall, the Export Policy aims to heighten the quality of export products, set up product-based industrial zones, or clusters, and

expand exports through five Business Promotion Councils. The strategy for implementing the Export Policy will seek to:

- Modernize and update Bangladesh Foreign Missions abroad by strengthening economic diplomacy.
- Provide assistance to producers and exporters in gathering market intelligence information regarding demand, competition etc.;
- Provide assistance for updating and modernizing the overall trade system by ensuring the best use of all modern technologies, including e-commerce for making export products more competitive through reducing cost of doing business, increasing production, expanding market and reducing lead time.
- Encourage promotion of export through increased institutional facilities including trading and export houses;
- Provide various financial and tax subsidies or incentives including low-interest loans to exporters.
- Organize single country Trade Fair for Bangladeshi products in different countries; send trade mission abroad and support exporters to participate international fairs under the initiatives of exploring new markets for product branding and diversification.
- Send marketing missions abroad, arrange single country textiles and readymade garments fairs abroad and organize and participate in international trade fairs at home and abroad, so as to expand and consolidate the markets for readymade garments.

Specifically, training & development for exporters is offered:

- Bangladesh Foreign Trade Institute has been established for providing training on foreign trade.
- The Export Promotion Bureau will organize trainings, seminars and workshops in different parts of the country to inform the exporters of the rules and regulations regarding exports.
- Both regular and product-specific trade fairs of international standard will be organized in Bangladesh in order to invite foreign buyers, familiarize export products among them and thus connect buyers and sellers.
- Finally, the Export Promotion Fund offers facilities such as venture capital at low interest rates, support for sending marketing missions abroad and participating in training programs abroad on product development marketing skills.

### 3.3 Pakistan

The Pakistan Textile Policy 2014-2019 (Embassy of Pakistan, 2015) emphasizes the development of clusters to promote cost efficiencies, investments to remain competitive in the international market and skilled human resources for the value-added textile sectors. Efforts are undertaken to promote an 'enabling environment' for the textiles value chain through initiatives involving other Ministries and Divisions, such as Commerce. Finally, sustainability plays a considerable role in the Policy conceptual framework, and the Textile Policy aims at shifting to a higher content of man-made fibers (MMF) in the entire textiles value chain to enter high value niche markets.

The goals of the Policy include:

- Doubling textiles exports from \$13 billion per annum to \$26 billion per annum in next five years.
- Strengthening existing textile firms and establish new ones.
- Focusing on the SME sector to enhance growth in value-added products through support and incentives schemes.
- Launching schemes and initiatives for increasing usage of ICT.
- Making the textiles sector domestically and internationally compliant, especially with respect to labor and environment rules and conventions.
- Encouraging textiles units to use modern management practices for improving efficiency and reducing wastages.
- Systematically developing clusters and strengthening existing ones.
- Adopting measures to increase the ease of doing business and reducing cost of doing business.

Furthermore, specific policy interventions have been initiated to diversify products and disseminate information and awareness, such as:

- Efforts to widen the production base to include value-added products such as children wear, lingerie, beachwear, leisure wear, technical textiles, geo textiles and medical textiles.
- Collaborations with foreign experts, donor agencies and international universities for value-added product R&D.
- Dissemination of market intelligence on different countries' specific standards and compliance requirements, along with tariffs and preferential tariffs of competitor countries.
- The Better Cotton Initiative (BCI), which aims to promote measurable improvements in environmental and social impact of cotton cultivation on the land, climate, environment and people.
- Provision of marketing training, focusing on fashion garments and trends, apparel merchandising, made-ups, design and quality control.
- Establishment of 'Apparel Houses' - a one stop showcase facility for international buyers.
- Promoting joint ventures with leading international brands.

### 3.4 Summary

Figure 3.1 below is a visual representation of the findings of Chapter 3, presenting each country's key objectives for textile and clothing exports and efforts through industry coordination, ICT, marketing and showcase and financing and export credit.

*Figure 3.1*  
*– Summary*

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	<b>Key Objectives</b>	<b>Industry Coordination</b>	<b>ICT</b>	<b>Marketing &amp; Showcase</b>	<b>Financing &amp; Export Credit</b>
<i>China</i>	Expand export diversity; better quality exports that command higher prices	Mechanisms for better coordination and communication between enterprises, financial institutions, local governments and chambers of commerce	Cross-border e-commerce; Single-Window System; One-Stop Service	Develop industrial clusters overseas suitable to local conditions; guide enterprises in international markets; support demonstration projects	Increased financial support for textiles industry; export tax rebate rate upped to 15%
<i>Bangladesh</i>	Make Denmark a 'Hub' for the European market; Heighten the quality of export products; expand exports through Business Promotion Councils	Business Promotion Councils, under public-private partnerships to enhance export capacity; organize training and workshops on export through these	Ensure the best use of all modern technologies, including e-commerce	Organize single-country trade fairs; send marketing missions abroad; establish trade and export houses; arrange textiles and RMG fairs abroad; invite foreign buyers	Venture capital; support for export promotion activities through the Export Promotion Fund
<i>Pakistan</i>	Double exports in the next five years; enhance growth in value-added products through SME-sector focus; widen production base for more value-added products; develop clusters for efficiency	Promote an 'enabling environment' for the textiles value chain through collaboration with e.g. Chamber of Commerce; disseminate market intel and information on foreign markets' standards	New initiatives for increased usage of ICT	Provide marketing training; focus on fashion garments and trends, apparel merchandising; promoting joint ventures with international brands; establish apparel houses for international buyers	Support and incentives schemes for SMEs

This chapter has thus identified ten recurrent initiatives among India's three main regional competitors that will enhance their exports. These initiatives are:

1. Shift production towards more value-added products
2. Diversify exports to include more man-made fibers



3. Increase the skill level through the establishment of clusters for product development
4. Support for marketing missions abroad and participation in international fairs
5. Disseminate information regarding international best practices and market intelligence
6. Enhance ICT infrastructure to support e-commerce and better communication
7. Training of exporters in marketing and export related activities
8. Engage in partnerships with international organizations, universities and more
9. Invite international buyers to local production houses/fashion fairs to facilitate trade
10. Provide capital, funding and export credit to encourage more exporters



## Chapter 4 – Denmark-India Trade

## 4.1 Trade

The disposable income of Danish citizens has increased in recent years, making consumers more likely to spend a greater proportion of their income on designer clothing, brand-name fashion, and lower priced fashion items. A greater availability of low-cost clothing and the higher disposable income has shifted Danish consumers from repairing older clothing items to purchasing more new items. The Danes are concerned with social responsibility and exhibit concern for where and how goods are produced, including both raw materials and labor conditions.

The demand for organic clothing is growing, especially for children's wear. Denmark has a leading market position within children's fashion and has a number of children's clothing designers. Scandinavian children's wear tends to be more trendy or innovative than in other European countries. The success of the Danish children's wear market reflects the amount of money spent on children's clothing by families, who are spending an increasing amount of disposable income on children.

According to Denmark's Statistics, a household of two adults without children spends approximately USD \$2,400 on clothing, while a household with at least one child spends approximately USD \$4,200 per year. Following the greater trend for men's cosmetics and fashion, men are also spending a greater proportion of their income on clothing (Statistics Denmark, u.d.).

Denmark enjoys a strong design reputation. However, Danish designers do not occupy the highest rungs of the fashion industry and do not compete with well-known international luxury brands. The Danish clothing industry excels at retailing and creating mid-priced clothing. High spending Danish consumers look to foreign brands for luxury goods and high fashion for both adults and children. Additionally, the market for organic clothing is growing quickly and has high demand for women's, men's and children's fashion.

Danes are known for being quite fashionable and purchase new clothes frequently. For everyday wear, Danes are casually dressed, but they dress up for special occasions and for going out to restaurants and bars. Danish consumers are less likely to purchase clothing from catalogues or online; they prefer to see and try the clothing first.

Bilateral trade between India and Denmark has decreased from USD \$1077.8 million in 2009 to USD \$1051 million in 2015. While Indian exports to Denmark decreased by 26% from USD \$904 million in 2014 to USD \$667 million in 2015, Danish exports to India decreased by 12% from USD \$437 million in 2014 to USD \$384 million during the same period (Statistics Denmark, u.d.).

Major Indian Exports to Denmark are articles of clothing and accessories, textile yarns and made up fabrics, travel goods and handbags, organic chemicals, general industrial machinery and equipment, iron and steel, miscellaneous manufactures articles, footwear and furniture and parts thereof, bedding, mattresses etc. Major Danish Exports to India include medicinal and pharmaceutical products, general industrial machinery and equipment, electrical machinery, machinery specialized for particular industries, metalliferous ores and metal scraps, chemical materials,

professional, scientific and controlling instruments, organic chemicals, power generating machinery and iron and steel etc.

## Services

India's services exports to Denmark were valued at USD \$725 million in 2015, which was 9% lower than 2014 figure of USD \$793 million. Denmark's service exports to India were valued at USD \$1,062 million in 2015, representing a decrease of 17% over the 2014 figure of USD \$1,281 million (Source: Statistics Denmark).

### 4.1.1 Trade on Textiles & Clothing

Denmark is a good test market for an Indian exporter wishing to do business in Northern Europe, because of Denmark's small size as well as its low barriers to entry. The T&C industry is Denmark's fourth largest export business, and trade with neighboring Nordic countries is high. While there are many Danish designers who create viable, innovative and unique clothes for children and adults, there remains a strong market for Indian imports.

#### Danish Textile & Clothing Imports

Danish imports of T&C increased from DKK 33.32 billion in 2006 to DKK 42 billion in 2016. For this data, textiles and clothing covers the following broad economic categories: textile fibers, textile yarn, textile fabric, clothing and footwear. As previously mentioned, this increased imports of T&C demonstrates a rise in spending on clothing and a rise in the volume purchased due to lower prices. As Figure 4.1 below demonstrates, Danish imports and exports of T&C has been increasing for the past ten years (Statistics Denmark, u.d.).

Figure 4.1 – Total Danish T&C imports and exports: 10-year trends

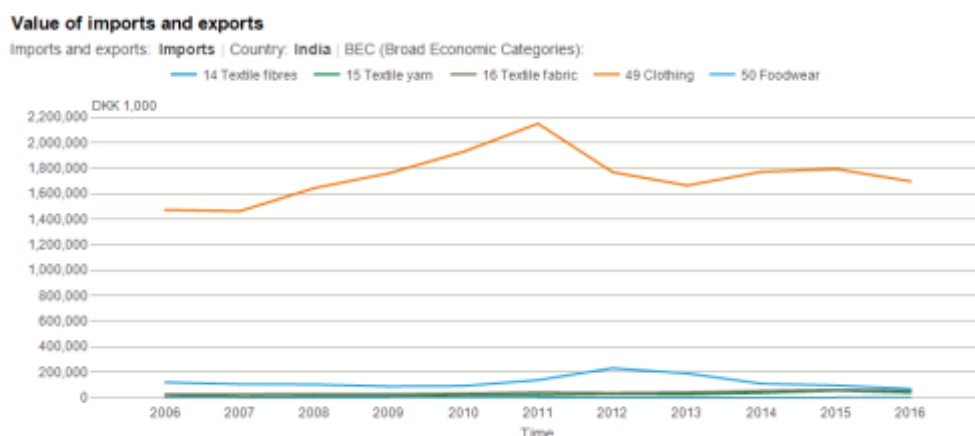
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
<b>Imports</b>											
14 Textile fibres	289 260	263 330	262 322	200 016	196 470	282 427	327 063	251 864	336 834	342 443	356 148
15 Textile yarn	1 188 065	1 168 748	1 119 347	721 349	718 025	885 273	795 802	813 343	753 472	826 572	869 090
16 Textile fabric	4 247 802	4 271 420	4 074 127	2 936 088	2 888 292	3 022 741	3 060 876	2 954 546	3 125 674	3 298 307	3 218 613
49 Clothing	22 812 670	24 243 604	24 196 981	21 717 905	24 333 271	26 233 090	26 535 582	26 008 753	29 104 660	30 625 095	30 796 102
50 Footwear	4 784 585	5 403 444	5 426 960	4 653 261	5 326 677	5 743 032	5 887 238	5 476 010	5 959 076	6 266 084	6 799 290
<b>Exports</b>											
14 Textile fibres	783 923	684 056	767 384	610 385	791 626	981 139	978 385	1 166 770	1 222 488	1 179 718	1 068 805
15 Textile yarn	983 911	966 835	880 382	572 715	437 985	493 824	446 459	436 183	466 067	451 107	476 768
16 Textile fabric	3 293 366	3 454 861	3 422 095	2 617 656	2 645 033	2 727 184	2 999 510	2 955 829	3 060 256	3 140 428	3 285 610
49 Clothing	19 822 232	21 056 062	20 897 652	18 425 389	20 859 085	23 453 102	22 214 935	22 717 306	24 654 438	26 638 318	27 168 621
50 Footwear	2 354 455	3 398 945	3 662 837	3 359 538	3 728 662	3 798 239	3 872 260	3 633 452	3 727 374	3 727 904	3 743 898

Please notice that this Danish BEC-classification does not correspond with the United Nations' BEC-classification.

Unit: DKK 1,000

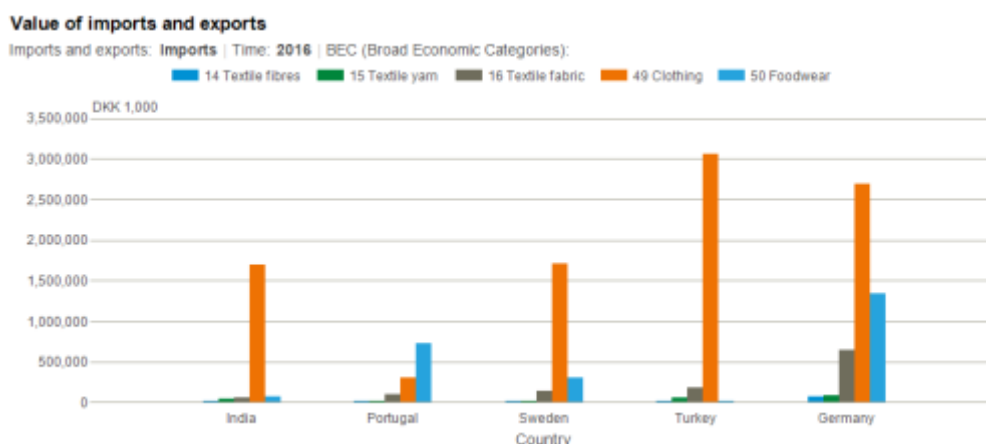
Meanwhile, imports of the T&C category from India for the same period paints a less positive picture. Imports from India has been decreasing since around 2011, and the value of imported clothing in 2016 stands at DKK 1.7 billion compared to DKK 4.3 billion from Bangladesh. Figure 4.2 below illustrates the declining trend in the value of Danish imports from India between 2006 and 2016 (Statistics Denmark, u.d.).

*Figure 4.2 – Danish T&C imports from India: 10-year trend*



Finally, India faces strong competition from Denmark's European neighbors. In particular Sweden, Turkey, Germany and Portugal are well-represented within Danish imports of textiles and clothing, as Figure 4.3 shows (Statistics Denmark, u.d.).

*Figure 4.3 – Danish T&C imports from European countries*

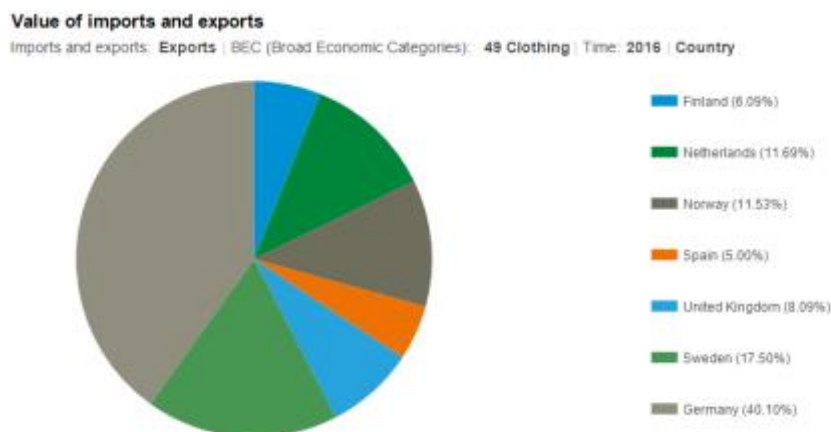




## Danish Textile & Clothing Exports

In 2016 Denmark exported clothing worth DKK 27.2 billion. This represents an increase of 37% since 2006. Exports from Denmark include the so-called re-exports: imported products, which are exported to other countries. It can be assumed that about 30-35% of Danish outerwear imports were re-exported. The top three destinations for Danish exports of clothing are Germany, Sweden and Norway, with other European countries making up important markets, such as the Netherlands and the UK. Figure 4.4 below provides an overview of Denmark's top export markets for clothing (Statistics Denmark, u.d.).

Figure 4.4 – Denmark's top T&C export markets



## Trends

Indian suppliers of textiles and clothing will need to consider certain trends in the Danish market before engaging in exports. These include:

- Increasing individualization; consumers are more difficult to control and less predictable. The trends are changing at a greater speed and this makes segmentation of the market difficult. However, mass fashion will still exist within different subcultures.
- Decreasing brand loyalty; consumers can combine a high-priced luxury product with a cheap private label product.
- Increasing concentration; the number of suppliers decreased from around 700 in 1987 to 350 in 2006. Many suppliers have merged or have acquired other suppliers (Most of the Danish suppliers can be found on <http://www.Textile.dk>. This website includes an online directory of the members of the Danish branch organization DTB).

### ***Distribution Channels***

Smaller Danish buyers most often use an agent. The agents usually purchase on the request of their customers. Wholesalers import ready-made garments and clothing manufactured according to given design specifications. These will typically have international brands as well as their own branded clothing.

### ***Import Duty***

When exporting to any EU country, including Denmark, suppliers from non-preferential countries must pay the following tariff rates;

1. Raw materials	0%	
2. Fibers & yarn	4 %	
3. Fabrics & made-ups		8 %
4. Clothing	12 %	

In Denmark, the value-added tax (VAT) is fixed for all clothing and textile products at 25%. There are several legislations regarding clothing in Denmark, for example:

- The amount of nickel in buttons, zippers etc. is regulated.
- Chemicals that are dangerous to health are not allowed in the manufacture of garments.
- The materials/fibers used for the product must be declared on the garment in Danish.

## **4.2 Survey & Analysis**

The data in this section is based on a primary market survey. The survey consisted of interviews conducted in person and via telephone. The surveyed actors included relevant industry associations as well as 27 clothing and fashion companies located in Denmark. The interviews sought to both classify responses, so as to be able to extrapolate from the given responses, as well as going qualitatively in depth with the surveyed actors, in order to uncover any potential assumptions and biases underpinning their responses.

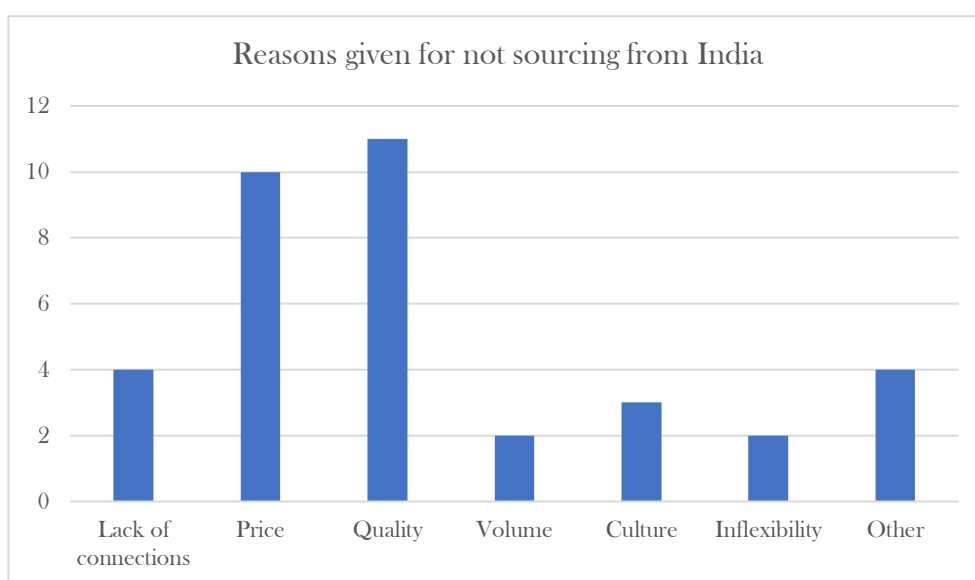
The survey revealed a range of insights, challenges and opportunities for increasing the import of Indian textiles in Denmark, which will be addressed below.

Of the clothing companies asked for this survey, 46% answered that they were sourcing from India, while 54% were not currently sourcing from India. These two response groups will be discussed in turn.

#### 4.2.1 Not sourcing from India

The companies who were not sourcing from India gave a range of reasons and motivations, which have been summarized in the below figure 4.5. As can be seen, the primary factors for not sourcing are Quality and Price, with a lack of connections and culture being secondary factors.

Figure 4.5 – Sourcing motivations among Danish buyers



##### 4.2.1.1 Primary factors for not sourcing

###### Price

While textiles and clothing from India are competitively priced in terms of global price levels, India's two neighbors Pakistan and Bangladesh can offer hard competition to the Indian prices, which will be looked at below. Moreover, the fact that Indian suppliers are particularly strong within cotton fabrics and garments means that they are exposed to risk from either rising cotton prices or falling prices on substitutable materials.

- **Pakistan**  
When it comes to Pakistan, the surveyed companies to a fault mentioned that the main price driver that leads them to source from Pakistan as opposed to India is the fact that Pakistan is exempt from

import duties when exporting to the European Union, due to its status as a GSP Plus country. The absence of this 12% import duty on Pakistani goods, hereunder textiles and clothing, disadvantages the Indian textile and clothing producers sufficiently to often account for a higher propensity among the Danish companies to buy from Pakistan as opposed to India.

Among the Danish companies surveyed that were sourcing from Pakistan, there was agreement that the quality of Pakistani T&C tended to be slightly lower than Indian materials. Still, the absence of import duties ameliorated this concern.

- **Bangladesh**  
50% of the companies that did not source from India said that Bangladesh was the main competitor to Indian products, particularly within the RMG segment. Bangladeshi clothing was generally experienced as being cheaper than Indian garments. However, the companies expressed concerns over Bangladesh's weak CSR profile, even the ones who were already sourcing from Bangladesh. Moreover, import duties are not levied on Bangladeshi clothing either, due to its status as a least-developed country (LDC) and the preferential treatment these receive under the EU's Anything but Arms initiative.
- **Cotton**  
Indian suppliers were particularly known among the respondents for their expertise within the production of cotton textiles and clothing. However, this also means that global cotton prices will have a significant impact on the ability of Indian suppliers to price their products competitively. With global cotton prices spiking wildly in 2011 and maintaining historically high levels since (Index Mundi, u.d.), respondents to the survey mentioned looking towards alternative fabrics such as polyester and viscose – fabrics that are not necessarily sources of strength for Indian producers.

### **Quality**

Quality was the most mentioned factor for not sourcing from India among the companies surveyed. This sentiment was chiefly expressed by companies that were primarily sourcing from Europe and Turkey as opposed to sourcing from farther away. The companies expressed that they placed a very high emphasis on quality control, which in their words also included the opportunity to quickly visit suppliers and make quick returns of delivered goods. As such, there is a prevalent element of distance underlying the many responses indicating that quality is a main reason for not sourcing from India. Moreover, less than half the respondents who indicated quality as a the reason for not sourcing from India had sourced from India in the past – suggesting that there might be bias behind this response in addition to experiences with Indian suppliers.

#### **4.2.1.2 Secondary factors for not sourcing**



### ***Lack of Connections***

Though this response was only the third-most given by the companies surveyed, it is highly interesting for the purpose of this report. In addition to giving Lack of Connections as a reason for not sourcing from India, a majority of the surveyed companies mentioned personal connections to suppliers elsewhere as a main reason for sourcing from there. Comments such as “We know the supplier in China very well, and have developed a good relationship, so we see no reason to source from other suppliers” underscore both the importance of establishing the direct connection between Indian suppliers and Danish companies, but also reveals an outsized role of personal connections when making business decisions.

The importance of personal connections in choosing suppliers suggests that relational factors can take precedence over financial or logistic factors, which is both a challenge for increasing the import of Indian textiles in Denmark, but also a potential source of opportunity.

Moreover, respondents said that there is a significant degree of ‘grouping’ among the Danish companies in the field. It is a highly interconnected sector, where word-of-mouth has currency. This implies that when a Danish producer has found a supplier they like, they are very likely to recommend this supplier to other Danish companies, who are more likely to also use this supplier.

### ***Culture***

The respondents that mentioned culture as a barrier and/or reason for not sourcing from India did not refer to any major cultural barriers. There was for example agreement among the surveyed companies the English language offered a convenient and easy way to deal with Indian suppliers. What they were instead referring to was a prevalence of Indian suppliers making agreement that they couldn’t deliver on. This was characterized as a ‘yes culture’, in which Indian suppliers would agree to meet any order and any deadline given by the Danish companies, even though they might know that they would not be able to, i.e. saying yes to everything.

#### ***4.2.2 Sourcing from India***

Among the companies that were currently sourcing from India, only a negligible number mentioned factors such as price, quality or culture to be the reasons for why they were choosing to source from India. What was often mentioned however, was the personal connection the company had established with the Indian supplier. The trust and intimacy that comes from a longstanding business relationship was to some degree supplanting purely financial factors.

In addition to the importance of these relationships, the Indian suppliers were considered more agile than their Bangladeshi counterparts. The Indian suppliers were mentioned as being generally better at accommodating smaller orders and other custom requests than in Bangladesh, where very large factories are ubiquitous.

### 4.2.3 SWOT

This section complements and builds upon the survey results relayed above, in order to give a very concise overview of the strengths, weaknesses, opportunities and threats for increasing the import of textiles and clothing from India in to Denmark. It utilizes the findings from the survey analysis and supplements them with the many comments from the survey that don't factor into the categories above.

Figure 4.6 – SWOT model

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>Industrial strengths, like milling, sewing, cotton production</li> <li>Strong technical capabilities</li> </ul>	<ul style="list-style-type: none"> <li>India's geographical distance</li> <li>Import duties on products</li> <li>Lack of current foothold in Danish market</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>Highlight India's strong CSR profile</li> <li>Connect with Danish buyers and build relationships</li> <li>Development in Chinese the market forces Danish buyers elsewhere</li> </ul>	<ul style="list-style-type: none"> <li>Rising cotton prices and industry trend away from cotton</li> <li>Rise of 'produce locally' mentality</li> <li>Pressure for shorter delivery times</li> </ul>

#### **4.2.4 Recommendations**

The research clearly points out that Indian's share of textiles and clothing in the Danish market has eroded in the past few years. The Danish market has not been considered a significant market and has suffered from the lack of a proactive approach by the Indian export community – manufacturers and export promotion organisations included.

However, with all the fundamentals in place the opportunities to boost Indian exports to Denmark are attractive. Indian exporters will benefit considerably by keeping the following recommendations in mind:

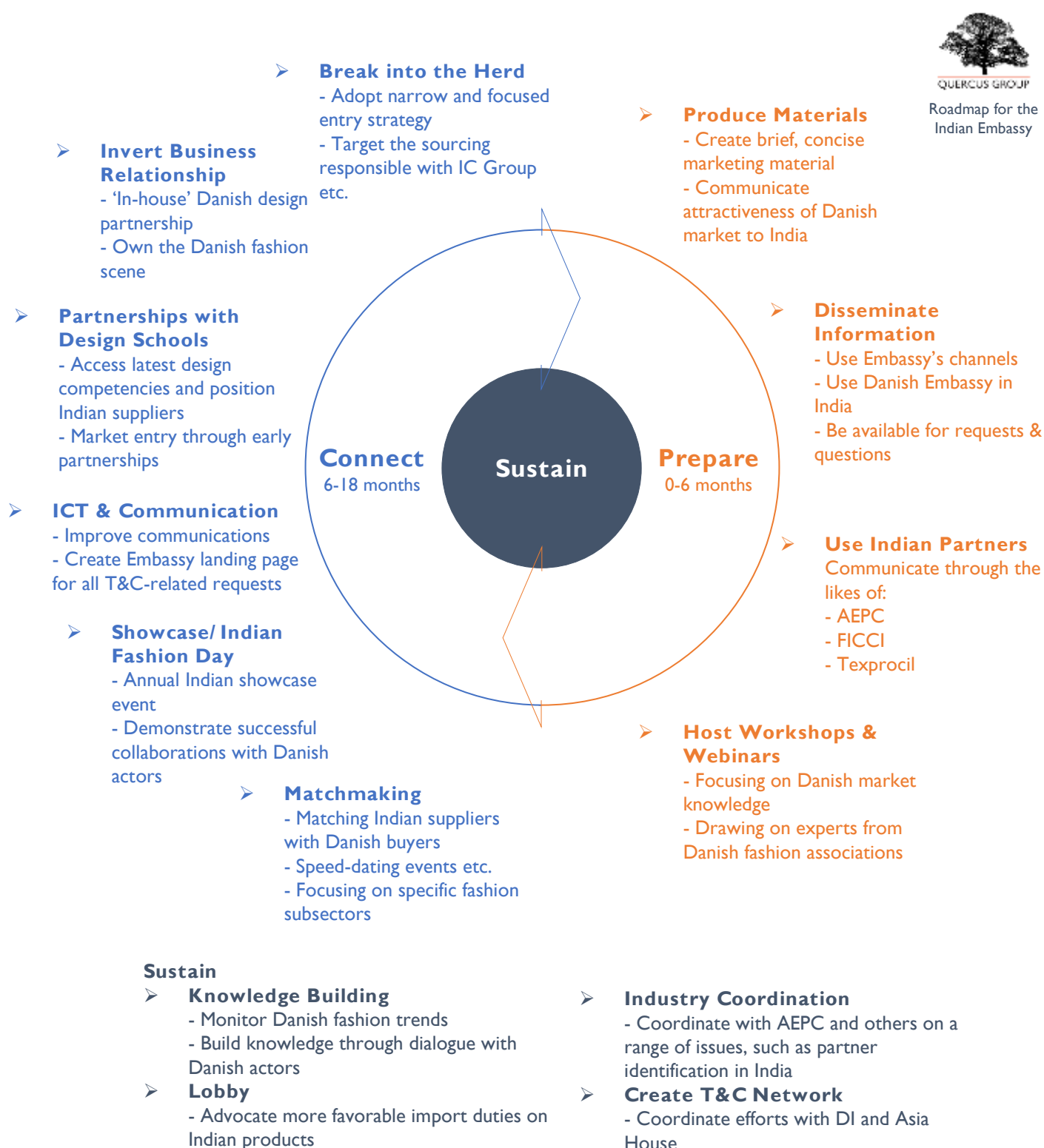
- **Understand thoroughly the Danish market by not only analyzing the industry but also understanding the Danish business culture.**
- **Create awareness in Denmark about Indian strengths in the sector.**
- **Build capacity in areas such as design, technology, sustainability, environment and CSR competences to address the demanding Danish market.**
- **Adapt products to match importers' quality and design criteria and service the market with value-added products and services.**
- **Diversify product portfolio to include MMFs, thus hedging volatility associated with natural raw materials.**
- **Establish long term relationships and presence in the Danish market and actively participate in fashion fairs to gain knowledge and strengthen network.**



## Chapter 5 – Roadmap

In the previous chapter a list of general recommendations was suggested, which will boost the exports of Indian T&C to Denmark. In this chapter the recommendations have been further developed into specific initiatives thus building an implementable road map. The road map has both a near-term and long-term perspectives, by including the three components 'Prepare, Connect and Sustain'.

Figure 5.1 below illustrates how the main components in the roadmap for boosting exports to Denmark work together.





Each of these three main components have a list of specific recommendations that will be elaborated below.

The two main elements of the model – Preparation and Connecting – work to reinforce each other and should be seen as a continuous process. This entails that the Embassy should take a range of steps towards preparing the Indian suppliers and Danish companies for meeting each other, after which there are several steps that work towards making the connections and matching relevant actors.

The timeframes for the two phases should be seen as guiding and should be adapted according to the Embassy's progress in working with the Roadmap.

The center part of the Roadmap represents several recommendations of a 'sustaining' and more strategic nature. These are used to ensure the long-term viability of Indian imports into Denmark. In the following, each of the three interconnected steps are presented and the concrete recommendations relating to these are mapped out.

### **1) Prepare**

The need for Indian suppliers to be better prepared for the specific demands of the Danish market was a ubiquitous point made by the respondents to the market survey. Moreover, the Danish market isn't top of mind for many Indian suppliers. Consequently, this initial stage of the roadmap ensures the necessary preparation within these two areas, while also laying the groundwork for the connections that will be sought in the subsequent stage. In the preparation of Indian suppliers of T&C it is recommended that the Indian Embassy undertake the following activities:

#### **Producing materials about the Danish market**

With the aim of ensuring a higher level of knowledge about the attractiveness of the Danish market among Indian suppliers, it is recommended to produce some materials about it. These should be kept very brief, and relay the big

picture of the clothing industry in Denmark. It is advised to keep these to 1-pagers or flyers. They should contain an overview of the size and importance of the market, as well as some information about a few key trends and drivers. It is suggested to make contact with the Danish Embassy in India/Invest in Denmark about this undertaking in order to understand how they might support this undertaking.

### **Disseminate information to Indian suppliers**

In line with the above and below the Embassy should seek to disseminate information about the Danish market through a range of channels. These should include the Embassy's own channels as well as the Danish Embassy in India. In this effort, as well as in the materials mentioned above, it is important that it is clear that the Indian Embassy in Denmark is the sender, and that it is easy to get in touch with them through contact information.

### **Using Indian partners for disseminating market intelligence**

To the extent possible, the Embassy should get other organizations to spread the word about the Danish market for textiles and clothing. These should include, among others, the AEPC, CII, FICCI and Texprocil, relevant trade fairs in India and any individual mills and producers the Embassy may know.

### **Hosting workshops & webinars to prepare exporters**

In order to build upon the interest raised with the above initiatives, it is advised to conduct workshops and webinars for the existing and potential suppliers to Danish companies. These webinars and workshops should focus on acquiring deeper knowledge about the Danish market – who are the players, what are the trends and where are the entry points? In doing so, it is suggested that the Embassy draws on experts from Danish fashion associations by e.g. inviting them as speakers on the webinars/workshops.

Furthermore, these are some key items to consider when preparing the Indian suppliers:

- Focus on Danish trends when preparing market entry
- Ensure that the Indian suppliers are targeting the Danish companies when these are sourcing, e.g. in December and January for AW collections
- Stress flexible and professional delivery times and good communication
- Stress the need for long term relationships, e.g. through a business contact who knows the Danish market
- Visit fashion fairs to gain knowledge and strengthen network

## **2) Connect**

For connecting key Danish and Indian stakeholders, it is recommended that the Indian Embassy undertakes the following activities:

### **Matchmaking of Indian suppliers and Danish buyers**

The key to successful matchmaking in the Danish market is to make it as targeted as possible. It is therefore recommended to focus on specific subsets of the fashion industry. For example, it is recommended to hold speed-dating events (e.g. done at the Embassy) between Danish companies and Indian suppliers. However, such speed-dating events should seek to hone in on e.g. women's cotton dresses, or men's MMF shirts, in order to increase the probability of success.

#### **'Indian Fashion Day' annual showcase event**

Boosting imports into Denmark will be easier if there is a greater awareness of the strengths and qualities of the Indian producers, as well as if there is a consumer demand for Indian products. To this end, it is recommended to host an 'India Fashion Day' event, that can act as a showcase for the Indian products. Such a day should in cooperation with Danish companies seek to highlight successful examples of Indian textiles and clothing in the Danish Fashion world.

#### **Consider ICT and communication**

In order to make the distance between thought and action as short as possible, the Indian Embassy should ensure that it is as easy as possible for Indian suppliers to get in touch. Consider creating an easily accessible contact page on the website and ensure coherence with the printed materials.

#### **Forming partnerships with design schools and students**

Besides the knowledge that might be learned from such partnerships, it is recommended that the Embassy applies a "Get them while they're young" approach. The loyalty of the Danish companies towards suppliers is very high, meaning that it can be hard to break into the market if you do not already have a client here. As a remedy to this, it is suggested that the Embassy introduces the Indian producers into the equation before the company has chosen its first supplier – maybe even before the company has been established. If partnerships between the Embassy and design schools could allow Indian suppliers to visit schools and students that haven't yet graduated, this would put them in an advantageous position when these students go on to found and work in Danish fashion companies after they graduate.

#### **Inverting the business relationship for market-tailored product lines**

Instead of thinking only in terms of trying to get Danish companies to buy from Indian suppliers, it is recommended that the Embassy pushes another concept on Indian clothing manufacturers: Hire in a designer that knows the Danish fashion scene (she or he will probably be Danish) as an employee, and get this person to design an entire line using Indian materials and products.

With the business laws in Denmark making it easy for a Danish designer to set up a company structure that would allow for this, this could be done with a relatively small and unknown designer, or through headhunting someone more established.

### **Breaking into the herd**

As mentioned earlier in the report, there is a herding effect in the Danish fashion industry when it comes to sourcing. This is why broad based branding of Indian suppliers shouldn't be the go-to method. Instead, it is suggested that the Embassy target the operations and sourcing responsible in the two largest fashion companies in Denmark – Bestseller and IC Group. Both are industry leaders that go a long way in determining where other companies go, and both generate strong word-of-mouth. In the case of IC Group, Quercus Group will supply the Embassy with appropriate contact.

### **3) Sustain**

The recommendations hereunder are meant to sustain the efforts undertaken above, as well as function as an ongoing strategic support of the aim of boosting the import of Indian textiles and clothing into Denmark. As such, these recommendations should be seen as an ideas catalogue of how to sustain and further a boost of imports into Denmark. To these ends it is recommended that the Indian Embassy engages in the following activities:

#### **Continuous knowledge building**

With the precariousness of the fashion industry in mind, it is recommended that the Embassy engages in continuous knowledge building, hereunder through engagement with contacts in the Danish industry and monitoring of market trends.

#### **Lobby for more favorable import duty on textiles**

It is recommended that the Embassy lobbies through the appropriate channels to seek more favorable conditions for the import of Indian textiles and clothing into the EU. Hereunder through individual cables to the Foreign Ministry of India and through banding together with other European embassies to bring awareness on this issue which disadvantages Indian suppliers.

#### **Establishing dialogue with key Danish industry stakeholders**

This dialogue should be pursued with several aims. Besides building up knowledge, as mentioned above, close dialogue could also be pursued to figure out how to ensure greater Danish participation in initiatives such as the India International Garment Fair hosted by the AEPC. Key Danish industry organizations should include the likes of Danish Fashion and Textile, WEAR, Danish Fashion Institute, Danish Textile Network, Federation of Danish Textile & Clothing as well as private actors such as IC Group and Bestseller.

#### **Coordinating with Nordic Indian embassies**

Given that especially Sweden has a very strong fashion industry as well, it is suggested that the Embassy coordinates with the neighbouring Nordic embassies within this area. One goal would be to secure co-financing for a dedicated shared employee – a “growth advisor” that could work to boost Indian exports to the entire region.

#### **Coordination with Industry Associations**

To the extent possible, industry associations such as the AEPC and Texprocil should be pushed to focus more on the Danish market. Institutionally the AEPC can be a valuable partner for the Danish Embassy, helping out with everything from disseminating materials and information to locating the right producers for the Danish companies.

### **Creating a T&C network**

It is suggested that the Embassy initiates and drives a network of Danish actors with a direct interest in increasing the import from India to Denmark. Chief among these are the Confederation of Danish Industry (DI) and Asia House. This should be done in order to coordinate efforts, as well as to seek out areas of collaboration and co-financing,

### **Ministerial visit**

It is suggested that the Embassy works towards securing a visit by the Indian minister for textiles. This ministerial visit would be used to open doors for Indian suppliers and would present a ripe opportunity for bringing along Indian and matching them with the Danish companies.

### **Take action**

Finally, The Roadmap has been converted into an 'Action Plan', or a template, for taking concrete steps towards the realization of the recommendations put down in this report. The Action Plan thus allows the user to fill in concrete actions to be taken under each part of the Roadmap and keep track of the efforts. This is attached separately from this report.

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