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Apparel manufacturers in Sweden 2013 – a survey of subcontractors

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Foreword

This report is the result of a survey of Swedish apparel manufacturers which has been carried out within the EU financed Baltic Fashion Project. The project is still on-going and this is the first report from Sweden. The data for this report has been collected by Christopher Gustafsson and Olga Wernemyr. Partners in the other Baltic Sea countries have performed similar surveys. The Lithuanian partner Linas Lasiauskas, from the Lithuanian Apparel and Textile Industry Association, will summarize the material from Estonia, Latvia, Lithuanian, Poland, Germany, Finland and Sweden and the collected material will be published on Baltic Fashion's web page: <http://www.baltic-fashion.eu>. The list of Swedish manufacturers (Appendix 1 in this report) has been published at <http://www.hb.se/THS/BalticFashion>

Authors of this report

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Apparel manufacturers in Sweden 2013 – a survey of subcontractors

Background

The value of the Swedish fashion industry has been estimated to 206 billion SEK, 129 billion of which represents the largest retailers.¹ Most of the products sold by these businesses are produced abroad. The question is whether there is still production of apparel products in Sweden? In fact, the answer is yes: there is a small group of subcontractors that specialise in different parts of the production process such as weaving, knitting, sewing and printing; thus, it takes several subcontracting services to make an entire garment. Some of them market their own brands as well, selling to consumer markets, whereas others function solely as subcontractors to different types of textile and clothing businesses. In this survey, we have only looked at those who produce for the apparel or clothing industries.

Every year, a multitude of new fashion brands are established in Sweden. Both these new brands and more mature ones are constantly on the lookout for manufacturers who are able to produce small quantities of their products. In particular, young fashion businesses lacking suitable contacts with manufacturers abroad are looking for alternatives closer to home. Finding manufacturers, however, poses a problem. The number of subcontractors to the fashion industry with production located in Sweden is quite low and they are also difficult to find, as there is no comprehensive list of them. STIF², the Swedish Association of Ready-Made Clothing Industries (Svenska Tekoindustriföreningen) and the Swedish Textile and Clothing Industries Association (TEKO), the Swedish industrial organization for textile and garment manufacturers, only list members of their associations. As not all manufacturers are members of these associations, it is difficult to identify the businesses producing for the clothing industry with production in Sweden.

The aim of the Baltic Fashion Project is to support the growth of fashion SMEs in the Baltic Sea region. Several different projects have been carried out during the lifespan of this project, which started in 2011. To find out more about the forms of support the fashion SMEs require, we carried out a survey and organized “roundtables” to discuss these issues³. One of the issues brought up during these discussions was whether local manufacturers exist and if they may be a resource of use to the fashion SMEs. Identifying the manufacturers in Sweden and the other Baltic Sea countries and publishing a list of them is thus one support measure that may make it possible for fashion businesses

¹ Modebranschen i Sverige: statistik & analys (Fashion industry in Sweden: statistics & analysis). 2013. Rapport 13:03, Volante. Association of Swedish Fashion Brands and Modeinkubatorn i Borås (Fashion Incubator in Borås). Only in Swedish. The large retailers are H&M, Lindex, KappAhl, Gina Tricot, MQ, Dressman, RNB Retail and Brands.

² STIF, The Swedish Association of Ready-Made Clothing Industries (Svenska Tekoindustriföreningen). Viewed Aug 20 2013, <http://www.svenskatekoindustriforeningen.se/>

³ Svengren Holm, L, Mouwitz P., & Radón A. (2012). *Support and training needs among Swedish Fashion companies*. Borås: The Swedish School of Textiles, University of Borås. Viewed Aug 20 2013 www.hb.se/THS/BalticFashion

to find possible subcontractors in Sweden and the Baltic Sea region. The overview of the subcontractors cover the entire production value chain from manufacturing materials (e.g. woven and knitted), finishing, dyeing, printing and pattern construction to cutting and sewing whole garments. In this report, we discuss the character of the manufacturers we found on the Swedish market. The list with information of what the apparel manufacturers in Sweden offer and contact details can be found in Appendix 1 in this report and on <http://www.hb.se/thb/balticfashion>.

Information about subcontractors to the fashion industry has been collected for seven countries around the Baltic Sea: Sweden, Finland, Estonia, Latvia, Lithuania, Poland and Germany (Mecklenburg-Vorpommern) through all the partners within the EU financed Baltic Fashion Project. The information is presented as a database and is published on the project webpage, www.balticfashion.eu

PRODUCTION PLACES

Looking for manufacturers

It is not only through the Baltic Fashion project that the Swedish School of Textiles has recognized the need to list textile manufacturers; every year, the School receives a large number of requests for assistance from businesses looking for manufacturers in Sweden. Where can we find a business to manufacture our products in Sweden? People who have an idea for a garment and want to start their own business look into this possibility. They are struggling to find materials and especially to find manufacturers who are willing to work with orders for small quantities. Many manufacturers in Asia simply refuse such small orders. Similar requests are also made on a regular basis from the Fashion Incubator (Modeinkubatorn).

During the course of the discussions with representatives from both small and middle-sized fashion businesses at the “roundtables” held by the Baltic Fashion Project, we received signals also from more mature Swedish fashion businesses that they would like to try manufacturing products in Sweden, if such production matched their requirements. The main topic for these discussions was to come up with ways to help stimulate growth for Swedish fashion businesses in the future.

Making Swedish manufacturers accessible, i.e. connecting supply and demand, may contribute to shorten the initial time spent finding manufacturers.

Where to find manufacturers

Some manufacturers may be found on the web through STIF, The Swedish Association of Ready-Made Clothing Industries (Svenska Tekoindustriföreningen). Small and medium-sized businesses manufacturing fabrics, garments and textiles are members in STIF. These businesses generally have production located in Sweden. However, manufacturers that are not member of STIF are difficult to find and contact.

Manufacturers of fabrics produced in Sweden are exhibited among agents of imported materials at the two Swedish fairs Preview/Stockholm and Nordic Fabric Fair/Boras. Both fairs are arranged by Agenturföretagen, the Swedish Association of Agents⁴.

The character of the Swedish apparel manufacturers/subcontractors

We found that it was of interest to investigate the situation and character of the Swedish manufacturers that are subcontractors to the Swedish fashion and clothing industry. What kind of services do they provide and what is the organisational character of these businesses? One interesting point was to find out whether the roots of these businesses can be traced to a time when most fashion businesses manufactured their products in Sweden or if they were founded after the outsourcing period started in the 1970s and 1980s.

In recent news, the topic of sourcing, i.e. production moving back to Sweden, is mentioned as a possible trend⁵. Two manufacturers of flatbed knitwear with their own brands and subcontractors to other fashion businesses have recently moved their production back to Sweden from Estonia: Ivanhoe Sportswear⁶ produces leisurewear and sportswear and Sätilla of Sweden⁷ mainly produces knitted headwear. The most recent example of this trend is Eton⁸, a Swedish men's shirt producer, that recently re-opened a small manufacturing facility in Gånghester, Sweden, a place where they used to manufacture product on a larger scale and which is still the location of their head office, to produce a luxury assortment of shirts. This is the first time in thirty years the company has hired seamstresses. Eight women were employed at an average age above 55; the oldest woman is 62 years old. The business hired experienced people in order to reduce the start-up time of the production. Eton is the only fashion design company that sews men's shirts in Sweden. However, it is unlikely that a large portion of the production for the fashion sector will move back to Sweden. In the case of Eton, the reason for re-opening the manufacturing facility was to produce a special segment of high-end products that fetch high prices in the market and that can be sewn in Sweden. In the case of Ivanhoe, several reasons are mentioned in the local TV newscast, "Borås Nyheterna", (2012): e.g. that

⁴ The Swedish Association of Agents (Agenturföretagen). Viewed July 2 2013, <http://www.agenturforetagen.se/en/massor-natverk/>

⁵ The Swedish daily newspaper *Svenska Dagbladet* publishes a series of articles about various kinds of industrial production moving back to Europe, including Sweden, from July 8 2013.

⁶ Lundgren, R. (2012 Aug 23) Ivanhoe's production returns home from abroad (Ivanhoes produktion tas hem från utlandet). *Borås Tidning*, p. 11.

⁷ Dahlin-Roos, I. (2011 Nov 16) Businesses move back home (Företag som flyttar hem). *Borås Tidning*, p. 28.

⁸ Brink, I. (2013 May 4) Eton's stitches "made in Sweden" once again (Åter svenskytt hos Eton). *Borås Tidning*, p. 20.

production in Sweden is easier to control and manage⁹. In the written introduction to the program, it is mentioned that “in the modern fashion market, the gap between design and production has grown too large, which is one reason to return production to Sweden” (our translation). It also appears Ivanhoe are motivated by financial reasons, according to Managing Director Anders Göthager in the interview by Lundgren (2012). Regarding Sätilla, the move back to Sweden included ten knitting machines and has led to “lower costs, more efficient production, less transportation, better quality and improved logistics” (our translation) according to Thomas Järvenstrand, Production Manager at Sätilla, in an interview by Dahlin-Roos (2011). Some machines were also replaced with more modern versions and machines with new product possibilities were added to the production. The increase in annual turnover is partly explained as an effect of the increased production. In addition to the above, fewer delays and smaller orders cause positive effects on logistics.

Textile clusters still in Borås

It is obvious that Borås still is a cluster for textile manufacturing businesses. Of the 23 businesses we identified when compiling the list, eight are located in Borås and another ten are located in the vicinity of Borås. The other five businesses are scattered between Malung (leather) in the north to Halmstad in the south, with one company in each region. Additional research is needed in order to find more manufacturers in e.g. the Stockholm region.

The overview

We were able to identify 23 businesses, all subcontractors in Sweden, for the clothing or fashion industry. An overview of the subcontractors and their character, is presented in the list below. The full list with details, activities and categories, including the names of the Swedish manufacturers (Appendix 1), has been published on the website of the Swedish School of Textiles/Research: <http://www.hb.se/THS/BalticFashion>.

Criteria for the overview

1. The business must manufacture its products or provide its services in Sweden.
2. The business must be a contractor offering production or services to other businesses within the apparel/garment/clothing value chain.
3. The business must have been contacted individually and agreed to be included in the overview.

Some businesses in the list manufacture products and provide services in countries besides Sweden as well. Some of the businesses in the list also market fashion brands of their own in addition to

⁹ Nyheterna Borås i TV4 (TV4 Borås morning newscast): (2012) Viewed July 14 2013 at http://www.tv4play.se/program/nyheterna-bor%C3%A5s?video_id=2172306

production on behalf of other businesses. Some businesses manufacture products both for the apparel industry and e.g. technical textiles.

Not included in the overview

1. Manufacturers producing solely for their own fashion brand/s.
2. Manufacturers or agents who mainly import production or services, with no production in Sweden.
3. Manufacturers of technical textiles or interior textiles such as textiles for furniture, etc., with no production related to the apparel value chain.

Research process

The aim is to make sure the list includes only the businesses that work for the apparel industry and have production in Sweden. However, many companies work with a mix of customers from e.g. both the apparel and the technical industries. If we were to include manufacturers of technical textiles, the list of manufacturers would grow very long indeed.

Through our network, we have asked people involved in relevant organisations, businesses and educations to contribute with information from their contact networks consisting of Swedish manufacturers for the apparel industry. We found that asking the fashion brand businesses was not sufficient, as the businesses were unwilling to share that information. However, the textile industry was able to provide us with a large amount of contact details, where contacts in the apparel sector were often mixed with contacts from other sectors, such as the technical textile sector. Hundreds of contact details were analysed to find the ones meeting the criteria set down above. Christopher Gustafsson and Olga Wernemyr then contacted each individual business to conclude the overview under the direction of project coordinator Pia Mouwitz.

The sources

The organisations that contributed with their contact information are: STIF, TEKÖ, the Fashion Incubator (Modeinkubatorn), Smart Textiles, the Swedish School of Textiles (staff in the printing, dyeing, weaving, knitting and sewing labs, as well as teachers and researchers) and, finally, the two businesses ACG Nyström and Textrico.

Limitations

This overview is not a comprehensive list of all Swedish subcontractors in the apparel value chain. To find as many subcontractors as possible, the use of additional data gathering methods is required. In the compiling of this list, we wanted to contact all businesses individually and this is the main reason behind our choice of data gathering method. However, finding relevant statistics regarding Swedish production is not an easy task. No information regarding Swedish apparel manufacturers relevant to this report is available from any of the industrial organizations. Although Proteko has some statistical data, it was not accessible for publication when this overview was written.

Manufacturer's fields of activities

Below, the businesses in the overview have been presented according to the fields of activities they themselves state they are currently active. The representatives for each of the businesses have been asked to state only a limited number of set categories of activities to describe the activities of the business.

Table 1 Summary overview of 23 companies identified

Activity	Number of businesses	Employees	Export	Units per contract	Age of business (years)			
					1-5	6-10	11-20	>21
Pattern construction	4	1-7	3	3 No minimum 1 Sample collection	0	1	2	1
Cutting and sewing: samples and small series production	7	1-15	5	4 No minimum 1 50 1 1-150 1 Sample collections		1		6
Ditto for leather	1	11	1	According to agreement				1
Circular knitting	3	6-20 ¹⁰	3	1 No minimum 1 100 100kg (approx. 100 units)				3
Knitted garments flatbed	1	10	1	1 No minimum				1
Knitted accessories	1	2	1	1 No answer				1
Woven fabrics	1	80	1	1 Minimum 300 m				1
Dyeing and finishing	2	20-25	1	1 Minimum 5 kg 1 1-1000 kg				2
Printing	3	5-15	3	3 No minimum	1		1	1

Comments per activity and category

Pattern construction:

General information about the category: Four businesses offer pattern construction. Two of them are also active in the category Cutting and sewing: samples and small series production.

(Note: The businesses can do Cutting and sewing of at least one of the following: Samples or small series production.)

Specials: Three of the businesses offer grading.

Own brand: None

¹⁰ One company stated 20 (100). The figure 20 has used in the summary as the possible figure of 100 will require further investigation for it to be included in the data.

Cutting and sewing: samples and small series production:

General information about the category: Eight businesses are listed in this category. Four of the businesses state that they do tailoring.. Six businesses manufacture workwear and five of them also manufacture leisure wear and sportswear. Three businesses make headwear. Three businesses offer pattern construction and one of these three is a specialist in leather.

Specials: One business manufactures jeans, coats and parkas. One business does modifications and repair work. One business offers protective clothing made in tricot, e.g. fleece and pile. One business does embroidery. One business is specialized in leather.

Own brand: Six of the businesses in this category market a fashion brand of their own.

Circular knitting e.g. jersey:

General information about the category: Three businesses manufacture circular knitted tricot garments and fabrics, including the dyeing and finishing processes. All three businesses work with leisure wear and sportswear, headwear and workwear. One of the businesses also makes socks and another also does trimming. They all report that they have the capability to handle pattern construction and that they do cutting and sewing of samples and small series production.

Specials: One business mentions “complete solution”.

Own brand: None

Some of the businesses mention on their websites that they are involved in close collaborations and produce garments in the Baltic countries.

Knitted flatbed garments:

General information about the category: One business works with leisure wear, sportswear and workwear. The business primarily does flatbed knitting of garments and also offers circular knitting products.

Specials: No

Own brand: Yes

Knitted accessories:

General information about the category: One business works with headwear.

Specials: No

Own brand: No

During the course of our research, we found around 10-15 businesses that work with socks/accessories and that may be eligible for this category. However, further investigation is required regarding these businesses in order to find out if they meet the requirements to be included in the list.

Woven fabrics:

General information about the category: One business makes fabrics for leisure wear, sportswear and

workwear. It also handles dyeing and finishing of its fabrics.

Specials: High-tech fabrics

Own brand: Yes

Dyeing and finishing:

General information about the category: Two businesses offer dyeing and finishing services of e.g. fabrics and jersey; one of them offers these services for workwear.

Specials: One business offers dyeing of yarn. The other business offers storage units.

Own brand: No

Printing:

General information about the category: Three businesses are listed in this category.

Specials: One offers digital, pigment printing. One business offers pigment printing and one business offers planographic printing.

Own brand: Two of the businesses market their own brands.

Units per contract and export

The information in this column is of special importance, as the question of minimum order size is one of the most important requests from those who search for local manufacturers. and having one's requirements regarding the minimum number of units per contract a business will take met is one reason to consider producing locally. Twelve businesses, i.e. almost half the group, state that they have no limits on minimum number of units per contract. Many of the balance businesses have low limits on minimum order size comparing to international limits, e.g. when manufacturing in Asia. However, although Swedish manufacturers at first glance appear to have workable limits on minimum order sizes, the primary concern of the customer is whether or not the business offers the requested product or service. Otherwise, it does not matter if they state that they have no lower limit on order size or very low limits. The data on units per contract is presented per category of activity below.

Pattern construction:

Three businesses out of four state that they have no limits on minimum order size. One business states "Sample collections" without stating a minimum order size. Pattern construction is a service accessible to small businesses in Sweden.

Cutting and sewing:

samples and small series production: Four businesses out of eight state that they have no limit on minimum order size. One reports a minimum order size of fifty units and one that its limits range from 1-150 units. One business states "Sample collections" and one states that minimum order size is set according to agreement (without stating a figure). This means that half the group of businesses in this category states that they can handle very small orders. A minimum order size limit of fifty units is to be considered low. A recently started business, however, may consider a mere fifty units to be a

relatively large order, as minimum limits for units per contract are normally stated for a single style. One business stated 1-150, which implies that sometimes the kind of garment, fabric, etc. will affect the limit on minimum order size for each specific style. Stating minimum order sizes as exact figures is therefore a difficult task for many of the businesses on the list.

This group includes two kinds of Cutting and sewing: samples and small series production. It would be wise to separate the two in order to be more specific. This matter will require further investigation.

Tricot fabrics, tricot garments, accessories and flatbed garments:

Two businesses out of five state that they have no limits on minimum order size. One business, which manufactures tricot fabrics, garments and headwear, starts at a minimum order of 100, although without stating the unit. One business states a minimum order size of 100 kg, which translates into approx. 200 garments. One business did not state any minimum order sizes.

Woven fabrics:

One business states that they require a minimum order of 300 meters.

Dyeing and finishing:

One business states that they require a minimum order of 5 kg and the other a minimum order size of 1-1000 kg. Minimum order sizes vary greatly between products. The equipment for each selected process is one of the factors that affect the ability of a business to offer low limits on minimum order sizes.

Printing:

All three businesses stated that they have no limits on minimum order sizes. It is a well-known fact that digital printing is a suitable printing technique for small orders.

The subcontractors' webpages

While searching for information on each subcontractor and what they offer their customers, we found that there is huge variation in the content presented on the webpages of the subcontractors. Some websites are carefully updated and provide excellent presentations of the products and services the business offers. Unfortunately, many of the webpages only provide a minimum of information, are less updated, not available in English, and do not state the actual capabilities of the manufacturer. Even a few businesses that have reached reasonable sizes only present their own brand on the webpage and make no mention of the possibility to work with the business as a subcontractor. Interested parties, i.e. presumptive customers, need to gain general information through the webpage in order to form an impression of the business and the products and services it provides, etc.

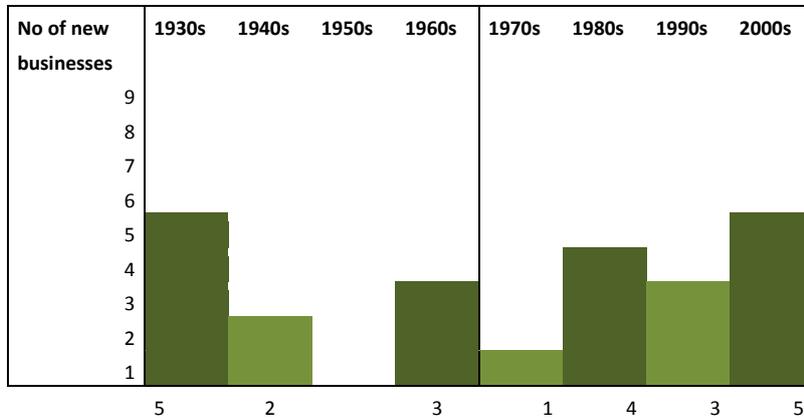
Export

Of the 23 businesses, 19 state that they export products. Four state that they do not involve in export; one of them works in pattern construction, two in cutting and sewing and one in dyeing and finishing.

Age of the businesses

The average age of the 23 businesses is 39.5 years. Five businesses were founded in the 1930s and none during the booming years of the 1950s, when the textile industry was still growing. For the other decades, one to four businesses were founded per decade (see figure 1 below). Of the businesses founded since the beginning of the 1970s, i.e. the decade when the trend of large-scale outsourcing of textile manufacturing started, thirteen are still active. Five businesses were founded in the 2000s, one of them in the last five years. The businesses started in the 2000s work mainly in pattern construction and printing. Having said this, it is interesting to note that Syverket (“The sewing workshop”), which was established in 2003, is a business that offers sewing of all sorts of garments.

Table 2 Number of businesses founded per decade from 1930s-2000s



Size of the businesses – number of employees

On average, the businesses in the list have 11.4 employees. One may draw the conclusion that we are dealing with a sector made up of small businesses and micro businesses, i.e. less than ten employees according to the EU standard. Nine businesses have less than five employees, six of which employ only one or two people. Hence, the majority (fifteen businesses) are of micro businesses (<10 employees). Seven businesses are considered small (between ten and fifty employees). Only three of the businesses employ over twenty people. The largest business, F.O.V., is a medium sized business (>50 employees) with its eighty employees. F.O.V.’s main line of business is high tech textiles and fabrics for sportswear and workwear. If we were to remove F.O.V. from the statistics, the average number of employees drops to 8.3, which means that the average business in the sector is a micro business.

Table 3 Number of businesses with number of employees

No of businesses	1-5	6-9	10-19	20-50	>50
10					
9	1				
8	1				
7	1				
6	1	1			
5	1	1			
4	1	1	1		
3	1	1	1	1	
2	1	1	1	1	
1	1	1	1	1	1
No of employees	1-5	6-9	10-19	20-50	>50
	micro	micro	small	small	medium

Summary

We found 23 businesses to be apparel subcontractors with production in Sweden. They employ a total of 261 people and the average business has 11.4 employees. Five of the businesses were founded after the year 2000. The average age of the businesses is 39.5 years.

The most common fields of activities are leisure wear and sportswear (eleven businesses) and workwear (twelve businesses). This is true for businesses offering cutting and sewing, tricot (jersey), knitted fabrics (tricot garment) and accessories, flatbed knitting of garments, woven fabrics and also for one of the two businesses in dyeing and printing. Four businesses offer pattern construction and some also offers grading. Cutting and sewing, including both samples and small series production, is offered by all in all eight businesses. All of them work with woven fabrics and four with knitted fabrics. Only four businesses state that they offer tailoring services. Many of the businesses offer a wide range of services, from highly specialised products such as specialised workwear, liturgical garments and leather. Two businesses work in dyeing and finishing and three in printing.

Many businesses offer a range from no limit to low limits on minimum order sizes. At first glance, this situation appears reasonable as we are dealing with small entrepreneurs in manufacturing of fashion products. However, it is difficult to handle even low limits on minimum order sizes in the very beginning of a production process. There are also a great number of other factors which are very important in the choice of manufacturer: what kinds of fabrics/qualities does it offer? Is product service up-to-date? Is the level of fashion high enough? Is the price acceptable? Is the level of knowledge, machinery, etc. sufficient for the customer's requirements?

We hope this list will be useful to those who have an interest in producing garments in Sweden.

Future development of Swedish production through research

When the fashion industry is ready to make a move towards a new future for local manufacturers, this overview may serve as a starting point. In the near future, we hope to be able to perform in-depth research regarding the situation of manufacturers in Sweden, which is to be followed by a plan to involve the fashion brands. One question we would like to see as the subject of further research is how Swedish production for the apparel industry can be developed in order to make it grow in the future and enhance the performance of Swedish fashion brands?

It would also be interesting do more research on the businesses that focus solely on producing garments for their own fashion brand/s in Sweden. Do they have surplus capacity and are they interested in manufacturing products for others?

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The Baltic Fashion Project

The Swedish School of Textiles is the Swedish national contact for the Baltic Fashion project, which aims to promote fashion. Between 2011-2013, activities and research are carried out within various subjects, e.g. mapping production, innovation, smart textiles and wearable technology.

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