



**CHALMERS**

# **Impacts of nearshoring on European liner shipping networks**

Cases of textile industry in Europe

Bachelor's Thesis within International logistics

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CHALMERS UNIVERSITY OF TECHNOLOGY  
Gothenburg, Sweden 2025  
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Gothenburg, Sweden 2025

## **PREFACE**

This report is the result of our bachelor's thesis at the Department of Technology Management and Economics at Chalmers University of Technology, conducted during the spring of 2025. The topic of this study was chosen based on the increased interest in nearshoring and how this might affect the textile industry and the liner shipping networks in Europe. Global events such as the COVID-19 pandemic, rising freight rates, and political instability have highlighted the vulnerabilities in global supply chains. This led us to investigate if companies are starting to move production closer to their main markets and how this may impact shipping lines and their network planning. We would like to thank our supervisor, Violeta Roso, for her support and valuable feedback throughout the work on this report. We also want to thank the shipping companies and professionals who agreed to be interviewed and shared important insights that made this study possible. Finally, we would like to thank our families and classmates for their support during the writing process Gothenburg, Sweden 2025

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### **SUMMARY**

This thesis explores how nearshoring in the European textile industry might affect shipping networks. Nearshoring relocating production closer to consumer markets, is gaining attention due to global supply chain disruptions (e.g., COVID-19, geopolitical instability) and sustainability concerns. The study analyzes sustainability and financial reports from textile companies like MANGO, Lindex, IKEA, and interviews with shipping firms. Findings show some movement toward nearshoring (notably by MANGO and Lindex), citing benefits like shorter lead times, reduced emissions, and improved responsiveness. However, widespread implementation remains limited; many firms continue relying on offshore production in Asia due to established networks and cost advantages. Shipping companies report minimal impact so far but are monitoring shifts and exploring short-sea shipping as a competitive option. The report concludes that while nearshoring is increasingly discussed, its real impact on European shipping networks is still emerging

Key words: Nearshoring, Offshoring, Network planning, Outsourcing, Covid-19, Liner shipping



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# 1. INTRODUCTION

In recent years, global supply chains have faced significant disruptions due to a series of major events. The COVID-19 pandemic led to widespread factory shutdowns and labor shortages, creating lasting ripple effects across industries. In 2021, the blockage of the Suez Canal by the Ever Given container ship halted traffic through one of the world's busiest shipping lanes. More recently, drought conditions have reduced capacity in the Panama Canal, further straining logistics. In 2024, escalating threats from Houthi rebels in the Red Sea have forced many vessels to reroute around the Horn of Africa, adding time and cost to international shipping (Notteboom, 2024). According to Magnus, Ibáñez, Scalco, & Hügl (2024) problems like this now remain the norm and not the exception. A big topic within shipping and logistics has been nearshoring and the possible conversion to this version of supply chains. The strategy is that nearshoring will create resilience in the supply chains (García-Alaminos et al., 2024)

To further understand the concept of nearshoring and why it has arisen an explanation of outsourcing is needed. Outsourcing is the process of moving a part of the company that was previously handled internally to an external part (Di Stefano et al., 2024). The reasoning behind this process is that the external company possess more knowledge and expertise (van Hassel et al., 2022). If the outsourcing is placed in a low wage country, there is possible cost savings to be made. Another cost advantage is scalability which makes the fee that the outsourcing company takes substantially smaller than what the cost would be to produce internally (Di Stefano et al., 2024).

There are several reasons as to why a company would seek to move from off-shoring to near-shoring, but there are many aspects to consider. Outsourcing encapsulates both near-shoring and offshoring, but the advantages differ from these two concepts. Offshoring as a concept of moving production from west parts of the world to the east often entails cheap labour and production costs but longer transport time. This is because the cost of living in these countries are cheaper and therefore wages are smaller compared to regions such as Europe. It means that production is placed far away from the home region. According to Gadde and Jonsson (2019) The current and long-standing offshoring solutions have production in countries such as China, Bangladesh and more. Nearshoring entails more expensive labour and production costs but shorter transport time. It means that production will be located closer to the home region which in the context of Europe is Northern Africa, Turkey, or East Europe (Gadde & Jonsson, 2019). The question that manufacturing companies must consider is if it is worth the more expensive labour to be able to cut down on transport time and increase flexibility. Lesser transport time also includes less transport costs and considering the state of the world a significant decrease in risk of delays, damage, loss of cargo and more (Notteboom et al., 2024). Which could instead save them money in the end.

According to Van Hassel et al. (2022) nearshoring has been an existing concept for many years now but started to get more attraction after the pandemic as the manufacturers and cargo owners realised the potential risks associated with offshoring. The surge in shipping prices, the scarcity of empty containers located in right place and the delays caused by this have made cargo owners conscious of the situation (Hirata & Matsuda, 2022). Another factor as to why nearshoring is considered when choosing production locations is sustainability. Sustainability plays a bigger role within companies and nearshoring is a way of decreasing emissions with focus on environmental sustainability. It is also a way of ensuring social sustainability as the nearshoring location makes it easier to control work environment as the chosen location has a higher degree of cultural similarity, smaller time difference and many more factors that argues for better social sustainability (Di Stefano et al., 2024).

A particular industry that excels in offshoring is the textile industry. With vast numbers of imports to Europe from countries such as China, India, and Bangladesh (Gadde & Jonsson, 2019). In 2024 alone EU imported 115 billion Euros worth of textiles where China alone stands for 30% of total imports (Euratex, 2024).

## **1.1 Aim of the study**

The aim of the thesis is to investigate if and how textile manufacturing nearshoring affects their supply chains in particular their shipping line network.

Therefore the goal of the multiple case study is to identify if there is a trend towards nearshoring within the textile industry in Europe and the main reasons as to why near-shoring is an option of outsourcing that companies consider. The focus is on the European market and how relocation would be considered in this market, and what aspects the shipping lines consider when setting up their networks. Therefore, the first research questions is:

RQ1: What indications are there that nearshoring is being implemented by textile manufacturing companies?

Furthermore, we would like to clarify if there are global supply chain disruptions, rising labour costs, and sustainability concerns that have led industries to reconsider sourcing strategies. Understanding how textile manufacturers shift production closer to consumer markets provides insight into broader industry trends. Factors such as geopolitical instability, transportation costs, lead times, and consumer demand for sustainability may influence supply chain decisions. Identifying these drivers helps assess the viability of nearshoring.

RQ2: What are the main reasons nearshoring is looked upon as an option when setting up supply chains?

Furthermore, the study aims to investigate how this trend could impact the liner shipping companies active in Europe. Analysing how nearshoring affects shipping lines is crucial. Previously reliant on long-haul routes from Asia, liner shipping companies may need to adjust as trade shifts toward intra-European routes. Examining these adjustments offers insights into economic and logistical implications. Especially how nearshoring could impact how shipping lines plan their network routing.

RQ3: How does the shift from offshoring to nearshoring impact liner shipping companies in the context of network planning?

## **1.2 Delimitations**

To be able to investigate the reports research questions to the fullest delimitations had to be made. The decision to focus on textile manufacturing companies was made to be able to compare companies within the same industry. Otherwise, a fair comparison would not be possible, and answers found not comprehensible. The focus in liner shipping lines was consciously made to narrow down from the entire logistics chain and to be able to find a more concrete answer. Further delimitations to shipping lines network planning were made as there are many aspects that could be studied that might not be of the relevance considered in this study. Delimitation as to which geographical area was made, and Europe was chosen as the home region in question for this report. The decisions to retrieve information from scientific studies, news articles, company annual reports and interviews were made to delimitate the amount of information available and ensure the integrity of the report. The textile companies annual and sustainability reports will be from 2021 to 2024. To be able to study the effects of Covid-19 and recent global disruptions.

## **2. FRAME OF REFERENCE**

To begin with, a brief explanation of the global trade disruptions caused by COVID-19 and the impact it had on the textile industry. Furthermore, key concepts that are repeatedly mentioned in the study will be defined and explained. In addition, the advantages of nearshoring regardless of industry, as presented in previous research, will be outlined. Additionally, the underlying reasons for not choosing nearshoring, according to prior studies, will be discussed. Additionally, an overview will be provided of where it is considered relevant to relocate production from a European perspective. Finally, a description of how network planning within the shipping industry is executed.

### **2.1 The Impact of COVID-19 on Global Trade and Textile Market**

In 2020 the world experienced an intense disruption by the outbreak of COVID-19. The consequences lead to a decreasing GDP (gross domestic product) around the world but also periods of low economic growth. In 2021 the global GDP decreased by 4.2% and the global trade by 9.5%, leading to a major impact on the shipping industry (Chen, Pang, & Pang, 2020). According to Chen, Pang och Pang (2020), COVID-19 is one of the recent breakouts in the global value chain that significantly had an impact on the developed economies, leading them to develop different strategies to enhance resilience against future breakouts. One of the strategies that has risen by companies to decrease global distributions is nearshoring.

Since the outbreak of COVID-19 in 2020 the global trade has been enormously affected (United Nations Conference on Trade and Development [UNCTAD], 2022). In comparison with earlier global financial crisis in 2008/09 and in 2015, the COVID-19 pandemic had a marginally worse effect on the global trade (UNCTAD, 2022). Due to millions of people all around the world losing their jobs, the global demand decreased and lead to the global trade to decline approximately 2.5 trillion dollars (UNCTAD, 2022). However, the global trade recovered partially in 2021 leading to an improvement of the economic condition by 28.5 trillion dollars (UNCTAD, 2022). The COVID-19 also had a negative impact on the global supply chain leading to cross-border restrictions and port closures causing delays in the logistics (UNCTAD, 2022).

Moving forward to the supply chain disruptions of textiles industries due to COVID-19, the mandatory lockdown had a considerable negative effect on the Indian textile sector (Khurana, 2022). Due to the decrease in demand 83 percent of the export orders in India were partially or totally cancelled (Khurana, 2022). Along with all the cancellations of export orders, the textile market in India experienced logistical disruptions due to rapid accumulation of inventory leading to substantial costs and expenses (Khurana, 2022).

The textile industry was negatively affected by the COVID-19 where some textiles were forced into bankruptcy due to the rapid decrease in global demand (Islam et al., 2023). In 2020, the European Union exported 64 billion dollars of textiles (Islam et al., 2023). However, the European Union encountered a decline in production output between April to June in 2020 by 26.9% (Islam et al., 2023). Although employment increased by almost 2.9% in Q3, the European Union was still negatively affected within their textile industries with a reduce in exports between Q2 and Q4 (Islam et al., 2023). One of the strongest hubs for fashion in Europe is France and due to the lockdown caused by the pandemic, it was found that the production levels dropped by 20 to 30 percent (Islam et al., 2023).

## **2.2 The differences between Outsourcing, Nearshoring and Backshoring**

Outsourcing is today a common way of setting up supply chains which means that a company entrusts responsibility of one or several parts of production to another part (Di Stefano et al., 2024). The reason for outsourcing generally includes cost savings, expertise, and perhaps more relaxed regulations (Di Stefano et al., 2024). The context of outsourcing this report focuses on is the relocation of production to foreign countries to be able take advantage of low labour costs and low production costs overall

Within the context of outsourcing another similar way of working is offshoring. According to Di Stefano et al. (2024) Offshoring indicates that the company in question has located their production far abroad. For example, a company who originates in Europe putting production in China. Offshoring unlike outsourcing means that a company moves the entire production without giving away control to another part (Di Stefano et al., 2024).

Nearshoring which this report focuses on is similar to offshoring in the sense that it has moved production away from the home country but still placed in the home region. Which differentiates from offshoring (Merino et al., 2020). The pros from nearshoring are the opportunity to locate cheaper labour and production costs then the home country whilst still have production in proximity to the end consumer (Merino et al., 2020). Which enables shorter transit times, cheaper transport costs and minimizing risks. Merino et al. (2020) Goes on explaining that another way of outsourcing is backshoring which enables the strategy to relocate production from offshore to the home country again. Which could be an advantage as there could be a higher availability of expertise. According to Merino et al. (2020) this is often overlooked as the home country has such small production that it would cost greatly to increase.

## **2.3 Advantages and disadvantages of nearshoring**

There are different factors that suggests the choice for nearshoring. In this chapter those underlying reasons are explained.

### **2.3.1 Shorter lead times**

According to Gadde and Jonsson (2019) one of the biggest underlying reasons as to why nearshoring is considered, is the possibility to cut down on transit time. Moving production closer will significantly decrease transport time as the distance between production and end consumer decreases. This makes it easier for companies to reduce stock under transport which in turn reduces capital costs. Di Stefano et al. (2024) explains that it is common for manufacturers using offshore supply chains to overproduce to not risk running out of stock.

The shorter distance to the end consumer is also a way of minimizing risk as it requires less stops during transit which can affect the schedule and may cause delays within the supply chain (Notteboom et al., 2024). From a European standpoint the risks when transporting goods from Asia are far greater than the alternative that nearshoring brings. Notteboom et al. (2024) Explains that currently in the red sea there are the Houthi rebels that occupy the red sea and forces deep sea shipping to sail around Africa in order to access Europe. That means a big increase in transit time and longer distance which also means risk for delays from weather increases as they are at sea for a longer time period.

Transport costs is not the biggest expense companies have through the supply chain but as they affect transit time it will increase the inventory costs to (Gadde & Jonsson, 2019). A part of shorter lead times is also the ability to react faster. The time from a request to a finished product will be significantly faster which means the companies can meet their clients' needs faster. According to Gadde and Jonsson (2019) it is therefore possible to have higher flexibility which is significant in enhancing the customer value. For companies within textile manufacturing trends is essential to follow and flexibility increases the possibility to react to trends and capitalize on them. Nearshoring also decreases the changes of being stuck with an inventory that will not be sold due to shifts in trends or season (Magnus, Ibáñez, Scalco, & Hügl, 2024).

### **2.3.2 Costs increasing in the typical offshoring regions**

The big gap in production costs between the home region and offshore has always been the determining factor as to why offshore is used. Recent years have shown an increase in labour costs in the developing nations (Piatanesi & Arauzo-Carod, 2019). The developing nations are now starting to evolve stronger economies which leads to better standards of living, this in turn leads to increase in labour costs, stronger currency, and more expensive raw materials for production.

This opens the opportunity to relocate production according to the nearshore principle. The gap between the pure production costs of using offshoring versus nearshoring is narrowing due to other reasons as well. One of the reasons is the rise of automation and the decrease in labour needed for production (Di Stefano et al., 2024). Which in turn leads to a decrease in labour costs.

### **2.3.3 Proximity and environmental sustainability**

During Covid-19 the demand for deep sea container far surpassed the shipping line's ability to supply (Pang et al., 2021). Which in turn lead to an enormous increase in transport costs (UNCTAD, 2024). This is a big reason as to why nearshoring became a big topic within logistics. The reasoning was that when you move production closer to the home region the transport distance would decrease and in turn the total transport costs will decrease (Van Hassel et al., 2022). The transport costs have since then moved back and forth where the latest peak was at the same time as the Houthi rebels first occupied the red sea (UNCTAD, 2024). This meant that the container vessels had to sail around Africa and have the containers at sea for longer time. This will decrease the supply of containers and with a high demand the price increases. Which stresses the advantage of having production in proximity to the end consumer.

According to Van Hassel et al. (2022) countries that are more developed are best suited for relocating production. As they have access to better infrastructure, airports, developed harbours and more. Areas that fit this description in proximity to Europe is East Europe and Turkey. Not only for the lower labour cost and short distance to end consumer but also to the similarity in culture. Nearshoring is therefore considered a better option then backshoring as it provides the flexibility required whilst keeping low production costs compared to the home region. Options such as North Africa are not yet applicable due to the state of development in these countries (García-Alaminos et al., 2024). They still require immense infrastructure investments to compete with East Europe and Turkey as the main locations for nearshoring.

For many years environmental sustainability has been a priority for a lot of companies. The huge environmental impact of offshoring is one of the negative factors within a company's carbon emissions (Di Stefano et al., 2024). The proximity leads to better control of environmental aspect as well as decreases the emissions caused by deep sea transport. Gadde and Jonsson (2019) states that it also makes it easier for companies to have better control of the social sustainability as one of the big difficulties with offshoring is the difference in culture and being able to control work environment. Other advantages from nearshoring include having the same time zones, knowledgeable work force and smaller language barriers (Carmel & Abbott, 2007).

### **2.3.4 Reasons to not choose nearshoring**

There are both pros and cons with the concept of nearshoring. Some of the disadvantages of implementing nearshoring is the possibility of losing network connections. Piatanesi & Arauzo-Carod (2019) Explains that the relocation of production from for example China to Europe could decrease the number of potential customers. It would also be a massive process in gaining new trust and confidence in new business partners. It is a step away from the comfort they gathered through long years of cooperation, this creates a fear of moving production and makes companies stay with their existing solution. The argument is to stick with something that works instead of taking the risk of relocation (Piatanesi & Arauzo-Carod, 2019).

As nearshoring is a concept that has not yet been highly implemented and is a new way of establishing supply chains, there are many factors that is still unknown (Van Hassel et al., 2022). This means that there of course is a risk that follows when relocating to nearshore production. Van Hassel et al. (2022) further explains that there is also few instruments and tools to determine where to relocate to and to calculate the actual cost difference that occurs.

## **2.4 Liner Shipping**

The definition of liner shipping is for instance container and RORO (roll on roll off) vessels that specifically offer regularly scheduled services on fixed routes (World Shipping Council, 2023). Today liner shipping services account for more than 80% of global trade in terms of volume and 70% in terms of value (Bergmann et al., 2023). This makes liner shipping and especially container shipping the most important transportation mode. Liner shipping makes up the backbone of global supply chains and developing economies have been able to export products across the world which creates jobs and improves living standards (World Shipping Council, 2023). Asia is at the centre of international container trade with around 70% of the total containers in maritime circulation moving through Asian regions (World Shipping Council, 2023).

It is common practice for liner shipping to have weekly services in the ports on their set route. There are currently more than 500 liner shipping services globally with more than 6000 ships servicing these routes (Bergmann et al., 2023). Due to the predictability that liner shipping offers the global trade have been able to flourish and offshoring has been highly lucrative through the years (Di Stefano et al., 2024). The Asia-Europe trade typically means large vessels that can have around 18000 TEUs (twenty-foot equivalent units) or even more, service large ports or hubs along the route with smaller vessels servicing from the hubs to smaller ports in the region (Bergmann et al., 2023).

RORO which was mentioned earlier is normally serviced daily or every other day and on shorter distances which makes it a good option for intra-Europe trade. The reason for the fast turnaround is the quick load on and off due to all cargo being on wheels mostly in the form of trailers (Santos et al., 2022).

### **2.4.1 Network planning within shipping and short sea transportation**

There are many different factors to consider when setting up a liner shipping network. The problem of creating services or shipping routes is known as liner shipping network design problem (LSNDP) which is a very complex planning problem (Bergmann et al., 2023).

Bergmann et al. (2023) continues stating that it involves high operational costs such as vessel costs and variable sailing costs, such as fuel costs, port costs, cargo handling costs and more. The objective of the network design is to satisfy customer demand at a competitive price. This demands a great amount of research when deciding which ports to call at, which route to sail, where to place the local office, which terminals that should handle the berths and many more factors. This means that the existing networks has been carefully planned out and with a possible change in the flow of goods a reconsideration may have to be taken by the liner shipping companies (Notteboom et al., 2024).

Nearshoring opens the possibility for cargo owners to choose between different modes of transport. Unlike offshoring where the optimal option is deep sea container shipping. It could in many ways be beneficial to use either rail or road transport for their goods as this could mean much shorter transit times and higher flexibility (Suárez-Alemán et al., 2015). This creates an issue for the shipping companies which control the transportation of goods from Asia through deep sea liner shipping. If the production relocates, they may lose their control of transporting the goods. This leads to the shipping lines needing to use short sea transport to compete with rail and road transport. The big areas where short sea shipping needs to compete is efficiency in cargo handling and port efficiency as well as the transport price (Suárez-Alemán et al., 2015). Time is the main reason to choose road or rail therefore in concept of short sea shipping RORO is the most competitive solution as this enables short port stays and efficient cargo handling (Suárez-Alemán et al., 2015), which means RORO can have daily departures whilst container shipping lingers in port longer. An additional benefit of integrating short sea shipping into the supply chain is the decrease in drivers needed as the trailers are mostly transported unaccompanied at sea (Santos et al., 2022). A factor to consider is the sailing distance as for shorter distances drivers may accompany the trailers. For instance, the route between Istanbul and Trieste in Italy is about 1500 Km with truck and takes 15 hours. If you were to sail that distance and only use drivers for last mile delivery you would save 1500 Km worth of fuel and 15 hours worth of salary for the driver. This means you can have fewer drivers in total because they can handle a higher number of shipments as the shipments takes less time. The sailing time will be longer in the end, but it will be the cheaper and more environmentally friendly option.

### **3. METHODS**

The following section in this study will explain what a multiple case study is, and it will also outline the selection of participants, the progress of the interviews and the method of interview used. Further on the section will cover up search process, ethical considerations, and the literature review.

#### **3.1 Selection of Method**

For this multiple case study several data collection methods were used; the first method were the review and analysis of scientific papers, peer reviewed articles and news articles relevant to the research questions. With the use of extensive source criticism, a high degree of assurance of the relevance of the papers could be made. Secondly when doing the research about the implementation of nearshoring by textile companies we choose to analyse the companies' sustainability reports and financial reports to reveal the extent to which companies in Europe incorporate nearshoring in their operations. The reason we are inspecting sustainability reports and financial reports and using them as data is because we strongly believe that they are valuable sources of information from the textile companies themselves. The reports show what they are focusing on and implementing in their business. What are being expressed in the sustainability reports and financial reports regarding nearshoring will be investigated further on by analysing if there are any effects on the shipping industry due to the implantation of nearshoring.

The third method used for the multiple case study was semi-structured interviews directed towards the shipping companies that were presumed could be affected by the switch to near-shore supply chains. The interviews were conducted online with a standardized set of questions for all interviews to keep consistency in the answers. The purpose of this selection of method is to achieve qualitative research to answer the research questions of this report. We decided to lean on qualitative rather than quantitative because we wanted to get a deeper understanding of how shipping companies are affected by nearshoring that is being implemented by companies within the textile industry. Analysis of qualitative data tends to be iterative, inductive and research centred. Collecting qualitative data can be achieved by words that are spoken or written (Denscombe, 2010). As mentioned earlier we collect qualitative data by interviewing shipping companies on Teams except of one company that choose to answer the questions by email. Another reason for choosing qualitative data over quantitative data is that we are not able to collect data from all shipping companies who operates in Europe. It is the same reason for the incapability to interview all companies within the textile industry in the time period we are given to complete this report.

To further support our study, we choose to select data from euratex.eu to compare the results from our interviews with. Euratex.eu is part of the network that represents the European industries and is daily cooperating with other federations who are active in the textile and clothing industry. We argue that Quantitative data being selected from euratex.eu can enable a wider range of outcomes which we then would consider in our discussions in this report. By combining various research methods and data resources, minimization of limitations and bias from one single method can therefore be enhanced (Denscombe, 2010).

### **3.1.1 Interviews**

The reason that interviews with shipping companies were chosen as one of the methods in the report is because it is an effective method to produce new data within the topics that are most relevant for the multiple case study (Denscombe, 2010). This enabled the report to collect information directly from a total of 4 individuals who work in the shipping industry and who can provide information attributable to their expertise and knowledge that are based on their positions within the shipping industry. In the beginning stages of collecting information by interviewing each shipping company at a time there were space for them to answer questions. The interviews were later transcribed and analysed.

When the interviews were conducted, a verbal agreement was made in which the interviewer assured that neither the company's nor the interviewee's name would be disclosed in the report. Furthermore, the companies agreed to be recorded to ease the workload in transcribing the interview. Sensitive data regarding the company's products and prices will be excluded from the report based on the participants' requests. These measures have been taken to protect the integrity of both the participants and the companies.

### **3.1.2 Data collection, sampling and participants**

The report is based on interviews with shipping companies that operates in Europe. We selected specifically interviews with shipping companies who operate in Europe because we are not able to interview every shipping company in every continent of the world. Therefore, the delimitation of shipping companies is important in our multiple case study. The individuals that are interviewed were chosen as participants particularly for their positions in shipping companies. The number of shipping companies we interviewed are 4.

There are two different types of data, primary and secondary. Primary data is data that are collected directly from the source itself, in our case the data were selected directly from the interviews from the individuals who works in the shipping companies themselves. In total three employees from three different shipping companies were interviewed and a director of a shipping newspaper. The employees hold positions as Cheif Commercial Officer, Operations Director, and Route Director. For the data to be entitled as primary data it is important that the specific data is being collected for the first time. Our result is based on both primary data and secondary data. The primary data is as mentioned collected from our semi-structured interviews with the shipping companies and the secondary data is collected from databases such as Euratex.eu and the textile companies own sustainability reports. The textile companies were chosen based on a few criteria's, minimum 500 million SEK in revenue. The companies need to be outsourcing to Asia in some extent with large parts of its home market being based in Europe. There must be public records of their financial and sustainability reports.

We interviewed 3 shipping companies who operate in Europe and offers shipping transportation to and from North Africa, Turkey and East Europe. The shipping companies offer transportation with containers therefor the shipping companies operates with container vessels as well as road transport of containers. The process of the interviews started when the decision was made on which companies to interview, and the data selection were determined. The requests to the shipping companies were made by sending them per email to ten different shipping companies. Out of the ten shipping companies, three offered to volunteer to be interviewed. One of the shipping companies offered to answer the interview questions per email and were also offering to answer to further questions if we had follow-up questions later on during the reporting period.

### **3.1.3 Literature reviews**

The information in the theory chapter consists of literature intended to provide a clear picture of the factors influencing global trade and the choice of nearshoring. The chapter is based on a deeper understanding of what outsourcing, nearshoring, backshoring and offshoring mean. This information is necessary for the overall impression of the study, as it helps create a clearer picture of why nearshoring is relevant. Furthermore, the literature includes background information on why nearshoring is relevant and the underlying reasons for this, as well as potential locations for relocating production.

Facts are also presented on why nearshoring might not be relevant. Additionally, an explanation of how network planning is made within shipping lines is presented to form a deeper understanding of how the flow of goods affect network planning. Finally, a comparison between road and sea transport is made to illustrate why cargo owners choose one or another. This type of data collection consists of secondary data. In other words, the theory is not information we have gathered ourselves, but rather existing data and information obtained by others

### **3.1.4 Search strategy and source selection**

The databases from which the material was retrieved are primarily Scopus, Google scholar as well as Chalmers Library's search system. Additionally, textile manufacturers own annual reports and sustainability reports were used in results chapter of the report. Initially, a discussion was held to determine which search terms were relevant and would be used to achieve the best possible results. These search terms were selected based on the purpose and research questions of the report, as they were intended to help clarify and answer them. The search terms used were: Nearshoring, Outsourcing, Backshoring, Offshoring, Advantages, Disadvantages, Covid-19, Effects, China, Freight Rate, Container, RORO, Liner Shipping, Network planning, Geopolitical situation, Houthi rebels. These words were used in various combinations to broaden the search results.

The search terms generated many results in the databases. At first, the focus was on finding articles about nearshoring in general. Then, the focus shifted to the advantages and disadvantages of nearshoring. Finally, information was sought regarding the role of liner shipping companies in the supply chain and the advantages and disadvantages of short-sea shipping. When a source was found, its abstract and results were first reviewed to ensure its relevance to the report. Then, the credibility of the source was verified. If the source was both relevant and reliable, it was saved in a shared folder for further reading. If, after a more thorough reading, the source was deemed to contain information relevant to the report, it was used as a basis for the theoretical chapter. The sources used were compared with each other. By comparing data from different time periods, authors, and databases, their validity was confirmed. This method is called Data Triangulation (Denscombe, 2014). When comparing the different articles, consistent information was found, further strengthening the validity of the sources.

### **3.3 Use of AI Tools**

AI tools, such as ChatGPT, were used to formulate and structure certain parts of the report. The tool was used to formulate text and ensure clarity in the writing. All generated suggestions were reviewed and adapted to ensure they aligned with the report's purpose and requirements.

## **4. RESULTS**

The result chapter is based on the information from the semi-structured interviews with the shipping companies and from the textile companies' annual reports that we have analysed in order to find the indications of implementation of nearshoring. The result part in this report is divided in 4 different section titles where each title is providing the results of each textile company as well as the results from the interviews with the shipping companies. All the shipping companies wished to be anonymous in the report, therefore no names of the companies nor of the employees we have interviewed will be disclosed.

As stated in the frame of reference chapter there are several advantages with nearshoring that can be divided into 2 head categories. Cost saving and decreasing environmental impact. To conclude if nearshoring is a trend and something that companies are implementing, financial and sustainability reports of several textile manufacturers will be compared against their previous years to see indications of changes in the logistics part of the business. And if that noticeable change is due to active choices towards nearshoring.

### **4.1 Company description**

The following section will provide descriptions of each textile company that has been examined in our research. The result is based on the textile companies' sustainability and financial reports that the textile companies themselves have published online on their websites. This section will also provide short descriptions of the shipping companies to understand the grasp of their business. A brief description of all shipping companies will be provided beneath the finding's headlines, this to ensure anonymity for the companies and not give away too many details. Since the companies have agreed to be anonymous in the report no official sources will be referenced under those headlines.

#### **4.1.1 Lindex AB**

Lindex AB was founded in Alingsås, Sweden and have today around 4300 employees all over the world. Lindex produces clothes for adults and children for every season of the year with 440 stores divided in 17 markets globally. 42% of the clothes that Lindex sells are produced with at least 15% recycled textile and 78% of their product range is made by sustainable materials. Lindex also sells their clothes online in 32 markets and together with their sales in store, Lindex generated 628,8 million euros in year 2024. (Lindex, 2025)

#### **4.1.2 MANGO**

MANGO was founded in 1984 in Barcelona, Spain and are today one of the leading fast fashion companies in Europe. MANGO has approximately 2850 stores located all over the world in 120 markets. With 2676 factories in the world, MANGO generated 3.339 billion euros which is an increase with 7,6% compared to year 2023. With clear sustainable goals, MANGO is aiming to have 100% fibres that are sustainably sourced or recycled by 2030 and 25% reduction target of total water impact. (MANGO, 2025)

### **4.1.3 Ellos Group**

Ellos was founded in 1947 in Sweden and is a leading E-commerce group in the Nordics within fashion and home furnishings. Together with the companies Jotex and Homeroom, Ellos Group has both internal and external textile products in meaning of home furnishings and clothes for adults and kids. In 2020 and 2021, Ellos expanded their Company in Europe where they launched their online store in Germany, Poland, the Netherlands, and Austria making it possible to sell their products in these European countries. (Ellos Group, 2025)

### **4.1.4 Didriksons**

Didriksons was founded in 1913 in Sweden and is today a leading textile company in Scandinavia within outdoor clothing. Didriksons produces mainly jackets of high water and wind resistant quality against cold weather. The company's target audience has consisted of fisherman from the beginning, with the purpose of saving lives of fishermen who works in harsh weather conditions. Didriksons has retailers in Europe as well as their own online shop with a total of 110 employees who works in the main office in Borås, Sweden and 6 employees who works to facilitate the communication in the office in Asia. (Didriksons, 2025)

### **4.1.5 IKEA**

IKEA was founded in the 1940's by Ingvar Kamprad in Älmhult, Sweden with the purpose to improve peoples' lives (IKEA, 2025). IKEA offers home furnishings and since 2015 IKEA has only sourced virgin cotton in their production of textile. According to IKEA, cotton is one of the main materials used for their textile products such as bedsheets, sofas, towels and curtains. From 1 September 2023 to 31 August 2024, IKEA generated a total revenue of 45.1 billion euros of their sales globally, which is including their sales of textile products (IKEA, 2024).

## **4.2 Findings from the textile companies' annual reports**

In this section, results from each textile company will be presented that have been found in financial and sustainability reports between the years 2021-2024.

### **4.2.1 Mango sustainability & financial report 2022 – 2023**

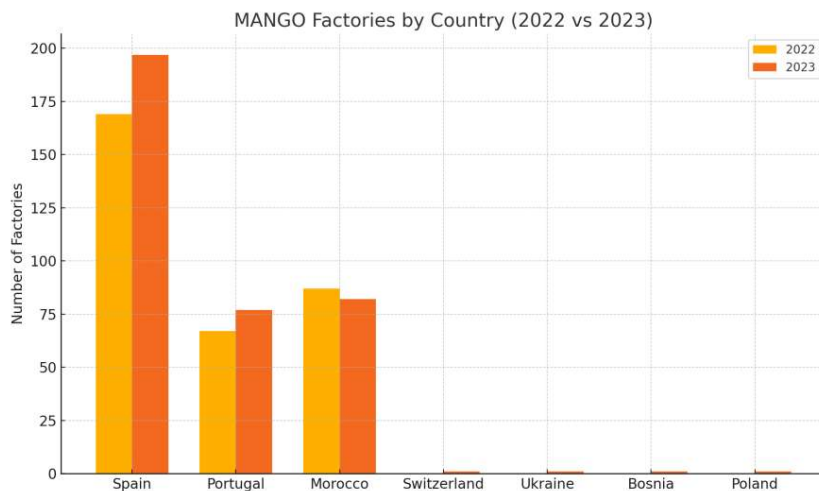
According to MANGO, a further step into sustainable commitment was taken in 2022 with a new launch of a strategic business model. The purpose of the new business model is to reduce the environmental and social impact to become more sustainable as a global company (MANGO, 2023). The model is divided into three commitment areas: Commitment to product, commitment to people, and commitment to the planet, with each concrete goal to be achieved by the year 2023. To achieve their goals and to become more sustainable, MANGO is aiming to achieve net zero emissions by 2050.

According to MANGO's sustainability report 2023, intermediate goals are set to be achieved by 2030 within their commitment to the planet where MANGO is targeting to reduce 80% of their direct greenhouse gas emissions in scopes 1 and 2. MANGO's scope 1 includes direct emissions associated with the company's activity while scope 2 includes indirect emissions (MANGO, 2023). Another initiative that MANGO has taken to support its commitment to be more sustainable is implementing new tools of the international alliance Cascale to calculate the greenhouse gases directly and indirectly emitted by their activities. MANGO also highlights its commitment to collaborating with suppliers to improve the efficiency of transport routes for their products (MANGO, 2023).

After analysing and comparing MANGO’s sustainability reports from 2022 and 2023, an increase in the number of factories in Spain was detected between those years. The sustainability report of 2022 stated that MANGO had 169 factories in total, and in the sustainability report of 2023, the total number of factories in Spain increased to 197 as visualised in Figure 1 below.

With further investigation an increase in factories in Portugal from year 2022 to 2023 was also identified (MANGO, 2023). In 2022 MANGO had 67 factories which they increased to 77 factories in 2023 (MANGO, 2022). Meanwhile the increase of factories in both Spain and Portugal, MANGO decreased their number of factories in Morocco (MANGO, 2023). In 2022 MANGO had 87 factories but in 2023 they decreased to 82 factories (MANGO 2023). Along the increase of factories in Europe and decrease in Morocco, MANGO went from not having any factories in Switzerland, Ukraine, Bosnia, and Poland (MANGO, 2022) to having one factory in each of these European countries (MANGO, 2023), which can be assessed as indications of nearshoring as seen in Figure 1 below.

To further investigate MANGO’s implementation of nearshoring their financial results from year 2022 and 2023 was compared with each other. According to MANGO (2022) the gross result from the year 2022 was 103 331 thousand euros. In year 2023, along with the increase of factories in Europe, MANGO had a gross revenue of 213 156 thousand euros (MANGO, 2023). It is clear that MANGO has increased their gross profit significantly from 2022 to 2023 showing a financial benefit possibly of the nearshoring.



**Figure 1**  
*Visualisation of the change in factories between 2022 and 2023 for Mango’s operations*

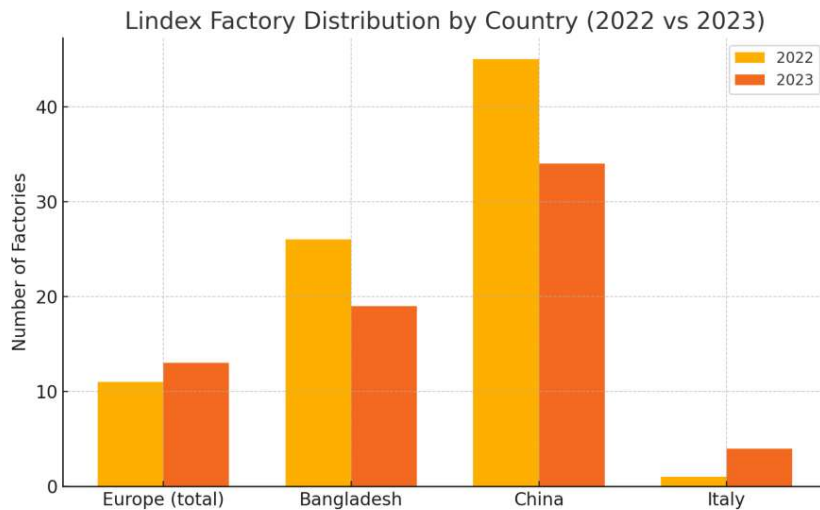
#### **4.2.2 Lindex AB sustainability & financial report 2022-2023**

According to Lindex’s sustainability report from 2023, one of their climate goals is to reduce 50% of their CO2 emissions by the year 2030. To achieve this climate goal, Lindex focuses on strategies within their own operations that can enable a future CO2 reduction. In their sustainability from 2030, Lindex pins out that their approach to reducing climate impact is based on measurement and data collection from their suppliers. In their climate action scope 3, Lindex (2023) points out that they use smart product distribution to avoid additional transport among their stores as well as combining transport with other companies in the same shopping area.

However, Lindex (2023) underlines that they do not have the business to demand changes by the suppliers they have indirect relations to or who are further down in the supply chain. Lindex (2023) highlights that the only way for them to achieve their climate goals is to investigate their suppliers' goals and so they can ensure that they are collaborating with suppliers whose goals align with their own. With further investigation of Lindex AB's sustainability reports from 2022 and 2023 an increase of number of factories in Europe was discovered. As visualised in Figure 2 below Lindex had in 2022 in total 11 factories (Lindex AB, 2022), which they in 2023 increased to 13 factories (Lindex AB, 2023).

Furthermore, Figure 2 shows that the decrease of factories in Bangladesh and China is on the other hand more significant. In 2022 Lindex AB had 26 factories (Lindex, AB) which in 2023 decreased to 19 factories (Lindex AB, 2023). In China in year 2022 the number of factories that Lindex AB had for production was 45 factories (Lindex AB, 2022) which in 2023 decreased to 34 factories (Lindex AB, 2023). Another increase of number of factories were made in Italy where Lindex AB had 1 factory in year 2022 and 4 factories in year 2023 (Lindex AB, 2023).

In the annuals reports from 2022 and 2023, Lindex AB is reporting that their operating costs has decreased from 260,1 million dollars in year 2022 to 253,6 million dollars in year 2023. This also shows that they have gained a financial benefit within their operations leading us to the conclusion of the possibility that the increase of factories in Europe has led to this result.

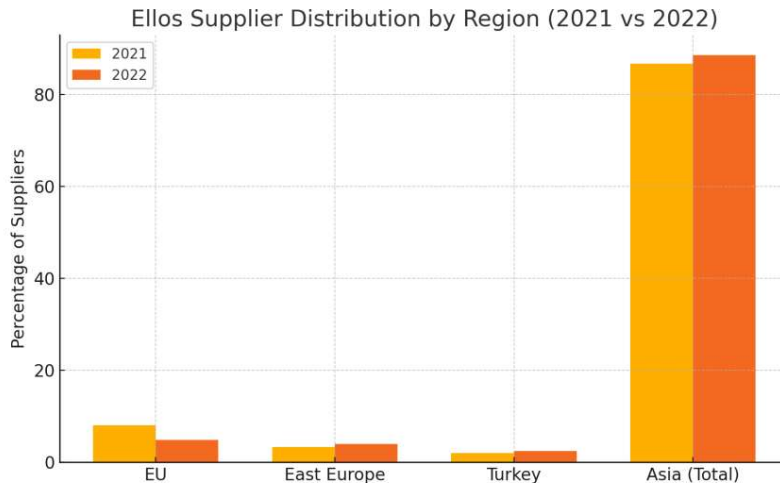


**Figure 2**  
*Visualisation of Lindex change in factories between 2022 and 2023*

### 4.2.3 Ellos sustainability & financial report 2022-2023

When comparing the sustainability report of Ellos Group from the years 2023 and 2022 the following relevant info have been collected. Sustainability is at the core of Ellos business plan and affects everyday decisions. As shown in Figure 2 below Ellos Group (2022) clearly present their global suppliers' locations which in 2021 had in EU, East Europe, and Turkey a total of 13,3 % of total suppliers and Asia with China as the majority stood for the rest 86,7 % (Ellos Group, 2022). According to Ellos Group (2023) the percentages for EU, East Europe and Turkey were 11,4 % which means there has been a decrease in total suppliers in the home region. The rest of the 88,6 % were in Asia where most of the production is in China 57,4%. Ellos Group (2023) states In 2021 EU had 8% and in 2022 down to 4,9%, East Europe in 2021 had 3,3% of total suppliers and in 2022 up to 4%. Turkey had 2% in 2021 and in 2022 up to 2,5% (Ellos Group, 2023).

Ellos Group (2023) states that the reason for the decrease in sourcing from the region around and within Europe is the inflation in Turkey, war in Ukraine and increased minimum quantities demands from suppliers. The change in supplier numbers between 2022 and 2023 were incremental (Ellos Group, 2024). Ellos Group (2024) themselves state that they own zero factories and outsource all manufacturing.



**Figure 3**  
*Visualisation of Ellos Changes in suppliers between 2021 and 2022*

Ellos Group (2024) further explains their sustainability plans for 2025 and 2030 which centres around better communication and increasing cooperation with suppliers. Their approach to this is creating a code of conduct that all suppliers must oblige to. The Code of conduct covers areas such as working environment, social sustainability, and environmentally friendly manufacturing. This is their way of addressing some of the issues that might come with outsourcing and offshoring. They also mention their target for 50% green factories by 2030 and 100% transparency within the supply chain (Ellos Group, 2024). Their transport mode of choice for cargo is by sea as 99% of their shipment to their warehouse in Viared goes by sea and the last mile by truck (Ellos Group, 2024).

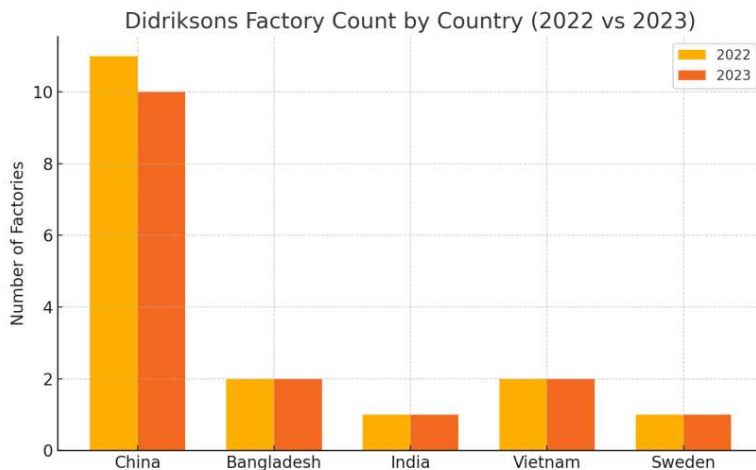
Ellos Group (2024) Financial reports show that there has been a significant decrease in emissions from transportation through the years since 2020, this is due to a decrease in the number of packages sent and a slight conversion to electric truck from their logistics suppliers. The decrease of emissions from transportation was -25% between 2022 and 2023 (Ellos Group, 2024). This also shows in the earnings of the year as a decrease in revenue by 5,2 % between 2022 and 2023, and a total of 200 000 less packages sent. Despite this the EBITA went from 54 million SEK to 177,6 million SEK (Ellos Group, 2024). One aspect to explain this could be the decrease in inventories that decreased 12,6 % between 2022 and 2023 (Ellos Group, 2024).

Within Ellos financial report they have done a risk analysis which focuses on a few logistics areas that has potential risk. They recognise the importance of trends and changes in seasons, in which they need to be highly accurate otherwise this can lead to inventory not being sold and forced price reductions (Ellos Group, 2024). Their ambition is to be able to act fast and adapt as the trends and seasons change to cope with this risk. Ellos Group (2024) recognise another logistics risk they have that is import restrictions and other conditions when purchasing goods. As their suppliers is mainly in Asia, they could be exposed to import restrictions, which could affect purchasing price. Their reasoning on how to handle the risk is that they have suppliers in many different countries.

Ellos Group (2024) mentions their return handling process where returns from within Europe (Where their market is) goes to a warehouse in either Poland or Estonia for evaluation and then either goes back in circulation as normal goods or in their outlet shops or if neither is possible it is sent to charity. They have a total discard number of 0,5% of all their textiles and 4% of hard home products as they tend to get damaged during transport more easily.

#### 4.2.4 Didriksons sustainability & financial report 2022-2023

Looking at the sustainability reports of Didrikson there is only slight differences through the years. They have an overall concept when it comes to suppliers that is long term business relations. They believe in keeping strong and closely connected long-term relationships with their suppliers regardless of location. They have offices in China and Bangladesh where most of their suppliers are located that is to ensure compliance of their code of conduct with regular check-ups (Didriksons Group, 2024). As shown in Figure 4 below Didrikson have in total 16 garment suppliers with 10 in China, 2 in Bangladesh, 1 in India, 2 in Vietnam and 1 in Sweden (Didriksons Group, 2024). Which means they are heavily relying on offshoring and the advantages that come with this. In Didriksons Group (2023) the comparison of number of suppliers shows the same except for China who had 11 suppliers instead of 10.



**Figure 4**  
*Visualisation of Didrikson's Factory count by country between 2022 and 2023*

Didriksons Group (2024) states that as a part of their work with suppliers they emphasize the importance of working closely with fewer suppliers instead of broadening the number of suppliers. This is to ensure that the Didrikson's values run through the entire supply chain. They recognise that if the quality controls they perform regularly were not conducted the risks for higher costs and increased handling of shipments can be avoided if production is moved closer to own market.

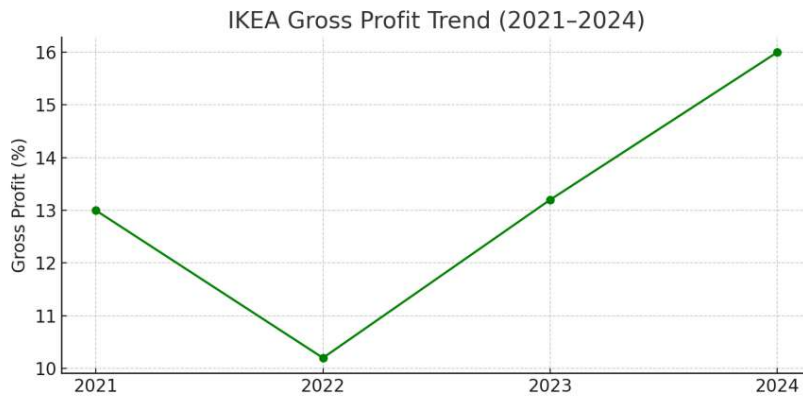
Looking at their emissions Scope 3 produces almost the entirety of their GHG emissions, in 2023 it was 98,42% (Didriksons Group, 2024) and in 2022 it was 99,51% (Didriksons Group, 2023). And the cause of emission is 91 % from purchased goods and services which means manufacturing of their clothes by suppliers (Didriksons Group, 2024). By 2030 their goal is to reduce their emissions in scope 3 by 50% from the base year 2020. The plan for emission reduction is based around better alternatives in production, choose better energy sources and better materials, and find better ways of transporting the goods (Didriksons Group, 2024).

Didriksons Group (2024) aim to transport all goods from suppliers by the sea and last mile transport with truck. In 2023 sea stood for 99,19% of all transported goods, 0,78% by air and finally 0,03% by truck. Didriksons Group (2024) claim that they are consistently working towards consolidating incoming shipments to increase fill rate. In Didriksons Group (2024) they show numbers that looked a bit different with air taking up 7,6% of transports and the explanation given were that due to the pandemic and market fluctuations there was a need to use air transport more frequently. This number were also high during 2021 and 2020 with the highest in 2021 with 9,4% of all transports by air. In 2021 rail transport was also used and stood for 2,9% but since 2022 rail is no longer used (Didriksons Group, 2023).

Didriksons Regnkläder AB (2024) annual report shows that the company had a revenue of 735 million SEK a decrease by 1 percent from 2022. The operating profit however amounted to 81,4 million SEK which is an increase from 2022 which had 57,2 million SEK. Didriksons Regnkläder AB (2024) explanation as to why this occurred is that the volume of sales to retailers decreased but the volume of direct sales to end consumer increased. During the year they started a logistics hub in the UK through an existing logistics partner, as well as made a new agreement with a new logistics partner in Sweden (Didriksons Regnkläder AB, 2024). Regarding suppliers, Didriksons Group (2024) mention the risks with having foreign offshoring suppliers which entails that global price fluctuations of freight rates, raw materials and salaries may negatively affect the costs. They also add that there are alternative suppliers to all their current suppliers so that if one supplier cannot meet their standards it will not affect them in the long haul. Didriksons Regnkläder AB (2024) also mention the possibility of political decisions such as tolls can affect their business in the short term.

#### **4.2.5 IKEA sustainability & financial report 2022-2023**

IKEA (2023) state without giving a percentage that most of its production is conducted in Europe with their 5 biggest manufacturing countries being Germany, Sweden, Poland, Italy, and China. This is due to that a large portion of their production is wooden products and these countries are where the most of their wood is sourced from. IKEA (2023) further states that round 90% of production comes from external suppliers all over the globe. The operational relationships with these suppliers are operated through purchasing offices, located close to where the suppliers are (IKEA, 2023). IKEA (2023) further explain the risks associated with handling supply chains and that they are heavily influenced by the pandemic and the war in Ukraine. The recent years the supply chains have been severely disrupted due to these events where Ikea during 2021 acquired containers of their own and chartered ships to ensure that the reliability of their transports remained (IKEA, 2022). Comparing financial statements from 2021, 2022, 2023 and 2024 there is a steady increase in revenue every year except 2024 because of the price reduction towards franchises, but the profit has fluctuated. Looking at Figure 5 below the gross profit of 2024 was 16% (IKEA, 2024) compared to 13,2% in 2023. In 2022 they had a decrease and landed on 10,2% compared to 2021 that was 13% (IKEA, 2022). Which shows that in 2022 with the inflation IKEA took a big hit as their costs of raw material and consumables increased with 10,7% compared to the revenue which increased by 7,7% (IKEA, 2023). In comparison with 2024 where both revenue and costs decreased as a result in less inflation and reduction in price in favour to consumers (IKEA, 2024).



**Figure 5**  
*Visualisation of IKEA gross profit between 2021 and 2024*

IKEA (2024) states in their sustainability report that 2/3 of their total emissions comes from material and manufacturing and their goal is to reduce their carbon footprint by 90% compared to baseline year 2016. According to IKEA (2024) their main focus in sustainability is the use of recycled materials within their manufacturing and the possibility of circular supply chains that reuse their own products, either as refurbished goods or reusing the goods for the materials. They also mention efficiency in many stages of their business as a core concept to decrease their carbon footprint, efficiency in water usage, efficiency in energy usage and so on. Trying to constantly improve assets they already have and increase the number of logistics facilities instead of moving them to other locations. Which shows in the IKEA (2024) annual report where they state a new 35 000 sqm factory in Slovakia just opened. IKEA is a global company with retailers and suppliers all over the globe which makes the concept nearshoring attainable in many stages already except for sourcing of materials. As IKEA (2024) explain they source 84% of wooden products from Europe and 56% of cotton is sourced from Asia.

### **4.3 Findings from interviews**

The focus of this section of the report is to present the results we received from the shipping companies we have interviewed. We interviewed four shipping companies with the same questions assuring their anonymity.

#### **4.3.1 Findings from Shipping Company one**

The first Shipping Company we interviewed plays a key role in global trade and are according to the Shipping Company committed to creating value for the environment. With 420 ports worldwide, their maritime routes include: Asia-Europe, Trans-Pacific (Asia – North America), Transatlantic (Europe – North America), Intra-Asia, Middle East and Africa. When asking the Shipping Company what their view is on nearshoring, the answer was surprising. The shipping company operates in 160 countries with 250 shipping lines and 650 vessels in their fleet. According to the Shipping Company, nearshoring is a very complicated operation and not as easy as it being explained in universities or on the newspapers. They also mentioned that they have not been affected by any textile company that has implanted nearshoring in their business plan. To our surprise, we continued asking how it is possible that they have not been affected when textile companies are actively relocating their factories closer. The Shipping Company explained that even if textile companies are trying to implement nearshoring in their business plan, the demand for transportation from Asia has not decreased at all. They also explained that the proportion of transportation within Europe is too small compared to the demand from Asia to Europe.

The shipping company evaluated their answer by making it clear that transportation within Europe is primarily by road and not sea, which is another reason to why they have not been affected by any nearshoring. All though they were very clear that they have not been affected, they acknowledged the nearshoring trends, they have just not been affected as a shipping company due to the small proportions of it.

#### **4.3.2 Findings from Shipping Company two**

The second shipping company we interviewed has their own unique infrastructure of ferry routes with mainly focus on connecting European countries with each other and with Turkey. Shipping company 2 operates in 20 countries and has 73 vessels in their fleet. According to the shipping company, Turkey has historically always been one of the significant trade partners for the European countries. The reason behind is due to both historical, political, and strategical reasons. When asking the shipping company if they have noticed any trends of nearshoring and if nearshoring have had impact on their network planning, the shipping company explained that it is important to note that such shifts of production cannot be done in short periods of time. The shipping company evaluated this statement by explaining that factors such as compliance on EU environmental regulations and competitive price points are critical factors and can have an impact on industrial productions. The shipping company exposed that INDITEX increased its production in Turkey right after the pandemic in 2021, which resulted with a dedicated route from Izmir-Turkey to Tarragona-Spain. On the other hand, the route lasted for 22 months and ended in November 2022 when Turkey became more expensive than Europe. This resulted according to the shipping company in INDITEX and other textile producers shifting their productions to Egypt.

When we asked the shipping company how they view the near-shoring trend and whether they are actively adapting to it, they answered that they continuously monitor the trade flows, trends and the economies of their target and local markets to identify potential new freight ferry routes or respond to new supply chain requests. The shipping company also mentioned that they are exploring options to connect Turkey with Egypt and they stated that “the whole initiative is another product of close follow up on the market needs”. They are responding to what costumers and the market need, in this case a new trade lane and efficient logistics solutions. They also answered that their business is an asset-based one where they see longer returns in investments, which they explained drives every operator in their business to have longer-term relationships in the industry. Their focus is on maintaining and developing their existing setup, as well as adjusting their tonnage to accommodate new opportunities. When we asked if they have been affected by the near-shoring trend, they acknowledged the nearshoring trend in the textile industry, but the impacts have had an indirect impact on them. They are adapting by launching new routes when opportunities arise and the route Marseille-Tunis has been performing slightly better than before, but the significant impact have been the Turkey’s economic struggles that have made it less competitive as a nearshoring destination. The shipping company is on the other hand optimistic towards the situation in Turkey where they believe that Turkey and the European countries will increase their collaborations in coming years.

### **4.3.3 Findings from Shipping Company three**

The third shipping company that we interviewed is a major global container liner shipping company. With routes connecting the entire globe and offering additional services such as warehousing, rail connection, road connection and much more. Shipping company three operates in 155 countries and serves 520 ports worldwide. The shipping company offers shipping solutions with 300 different shipping routes, and they have 900 vessels in their fleet. When asked about nearshoring the company states that it is more regarding needs of the customers and being able to make quick decisions and being able to solve the customers problem at hand. They focus on being more agile in their planning and look at all interesting possibilities instead of directing their network to accommodate possible cargo. They state that the key is to build long term successful business relations and if the customer is looking into nearshoring, they will make a proposition. According to the company a need for shorter intra-European transport has not seen any significant increase.

An explanation could be that the option to sail with RORO opens with short sea shipping which has departures everyday compared to container shipping which is more likely to be 1-2 times a week but with more capacity. When asked if they have noticed an increase in transport requests from typical nearshoring countries such as Turkey, east Europe, and north Africa they say that they have noticed an increase and they try to be responsive to all markets in what the customer inquiries. But at the moment they have no customer specific transport network in those areas, more that as long as it is profitable, they go where the cargo is.

They explain further that the focus in recent time for the business is costs and keeping the costs low through an optimised network, one important note is the amount of time a container is handled which is a big cost aspect. Also having the right size vessel and high fill grade keeps the costs down which in turn makes the transport distance not as significant. Looking forward the focus for network planning is the acquisition and ports within the networks that are reliable and can handle certain types of vessel sizes. This increases the control of a network and increase the reliability of the sea transport.

#### **4.3.4 Findings from the Director of a Shipping newspaper**

The fourth interview was with the director of a highly renowned maritime and shipping newspaper. The director goes on and explains why the concept of nearshoring has been something companies have considered the recent years. It is because of the vulnerability to disruptions in the value chain that comes with offshoring and showed reality as the pandemic and the current geopolitical state of the world has brought. Nearshoring is something they have been trying to keep tabs on since the pandemic and the reality is that it has rarely been completed and rather been up for discussion than executed. The various reasons for this are for particularly the textile industry the cost of transport is but a fraction of the total production cost. They further explain that the growing markets as of now is the countries they already have moved productions to such as China, India, and other Asian countries. So, the considerations are almost entirely leaning towards if the next investment a manufacturing company will make in a new factory is closer to the home region and not physically moving production already setup in offshoring supply chains. The director states that in many cases similarities to nearshoring is a way to circumvent trade tolls which make countries within the EU or countries with favourable trade deals with EU good candidates. For example, Romania who is a country that still has low labour costs and is a part of EU and a country that has seen a slight increase in textile production.

Regarding network planning the newspaper says they have seen an increase on the European container trade, but it has potential to increase even more. It still has to compete with road and RORO shipping which in terms of short sea in many ways is a better solution. A popular way of setting up supply chains is with the just in time concept, that entails what it says, that transports and cargo arrive just in time. This keeps margins and costs low meaning a lower safety stock can be used. Therefore, container short sea shipping might not be the best option and RORO with its higher frequency departures can compete with road much easier. The just in time networks were the ones most affected by the disruptions and caused much of the nearshoring debate. Which lead to many companies considering larger warehouses near the home region but since the interests starting to rise again, reconsiderations have to be made. Many companies are aware of the risks of offshoring but instead figuring out the best way to maintain the risks and still being able to minimize disruptions in their offshoring supply chains, perhaps using different suppliers to spread risks and using a smaller warehouse in the home region to ensure reliability in deliveries.

When looking into the future of network planning the director sees some clear trends, for example expanding the services to transport from door to door. For example, the Gemini project started by Maersk and Haapag Lloyd that focuses on reliability within transport. Which is a way to increase competition and attract new customers but also counteract the nearshoring trend. Because for the deep-sea shipping companies nearshoring poses a threat to them, as they maintain a revenue with long transport distances, shortening that distance will result in a revenue decrease. The director finishes with saying that they think nearshoring will be a reoccurring topic for many years to come as the geopolitical tensions will continue. But if the discussion become reality, they are still not sure of, the importance of being able to make quick decisions and have high readiness for action will become even more clear.

#### **4.4 Data for Textile imports into the European Union**

In 2021 the top EU suppliers had a share of 84% in total imports (Euratex, 2022). Euratex (2022) data further entails that there was a total of 106 billion EUR worth of textile imports. In the top 10 there are 4 countries that would be considered nearshoring production locations. They are United Kingdom, Turkey, Tunisia, and Morocco but in total they only stand for 22,5 billion which is 21% percent of the top 10 EU suppliers (Euratex, 2022). However, there is a clear decrease in sourcing from China, the difference between 2020 and 2021 is negative 38% (Euratex, 2022) but as the effects of Covid19 slowed down consumption and China closing down the total imports decreased by 7,5%. Bangladesh and Turkey made the biggest increases from 2020 to 2021 with 15,1% percent for Bangladesh and 19,4% for Turkey (Euratex, 2022).

According to Euratex (2024) the top EU suppliers had a 82% share of total imports in 2023, a 2 % decrease from the year 2021. With a total import of 115 billion EUR China in 2023 stood for 28% of total imports (Euratex, 2024) a decrease of 10% compared to 2021. However, Bangladesh has seen an increase in exports to the EU of around 18% (Euratex, 2024) which makes up for the decrease in Chinese exports to the EU. Turkey is still one of the biggest exporters to the EU but has only increased 0,02% from 2021. The other 3 nearshoring production companies has similar increases (Euratex, 2024). Looking at total Exports from the EU in 2021 the number is 167 billion EUR as the second largest exporter of textile and clothing with China being the biggest on 259 billion EUR. Of the 167 billion EUR 114 was intra-European trade and the rest exported globally (Euratex, 2022). In 2023 total number for intra-European decreased to 107 billion EUR, whilst the total number of exports increased to 218 billion EUR (Euratex, 2024). That is a 23 % increase in total trade and a 0,07% decrease in intra-European trade. Meanwhile China increased to 314 billion EUR of exports which is an 17,5% increase (Euratex, 2024). Euratex (2022) and Euratex (2024) further shows that other Asian countries such as Bangladesh, Pakistan and India saw similar increase to China or even more, for example Bangladesh increased in total 46% in textile and clothing exports in 2023 compared to 2021.

According to Magnus, Hedrich, and Ibanez (2024) European apparel companies have had nearshoring as a top priority since 2016, based on their surveys. But nearshoring has remained flat in practice, Magnus, Ibáñez, Scalco, and Hügl (2024) goes on and states that companies are shifting from sourcing in China but instead to other Asian countries. Between 2019 and 2023 the use of nearshoring has dropped 3% and Asia has about 75% of total production for European markets (Magnus, Ibáñez, Scalco, & Hügl, 2024).

## 5. ANALYSIS AND DISCUSSION

This study aimed to investigate the potential shift towards nearshoring within the textile industry in Europe and its potential impact on the current shipping networks. The research questions focused on identifying indications of nearshoring implementation, the main drivers behind this potential shift, and the resulting impact on liner shipping companies' network planning.

### 5.1 Analysis of textile companies

The findings from the analysis of textile companies' sustainability and financial reports present a mixed picture regarding the implementation of nearshoring. MANGO and Lindex AB show clear indications of increasing their number of factories within Europe, as shown in Figure 1 and 2. Alongside a decrease in production facilities in traditional offshoring destinations like China and Bangladesh. This suggests a potential strategic move towards closer proximity to their European consumer markets, aligning with the drivers of shorter lead times (Gadde & Jonsson, 2019) and increased flexibility (Merino et al., 2020) highlighted in the frame of reference chapter. The reported financial benefits, such as increased gross profit for MANGO and decreased operating costs for Lindex AB, could further support the argument for the economic viability of nearshoring for these specific companies. However, Ellos Group's reports indicate a decrease in sourcing from Europe, Eastern Europe, and Turkey, attributing this to factors such as inflation in Turkey, the war in Ukraine, and increased minimum order quantities (Ellos Group, 2023). This highlights the complexities and potential challenges associated with nearshoring, such as the uncertainties due to few ways to measure the success of nearshoring (Van Hassel et al., 2022). Economic and geopolitical factors can quickly shift the attractiveness of potential nearshore locations (Notteboom et al., 2024). Despite this, Ellos' focus on sustainability and transparency within their predominantly offshore supply chain suggests an awareness of the broader discussions around ethical and environmental concerns associated with long-distance sourcing.

Didriksons presents a different approach, emphasizing long-term relationships with a smaller number of suppliers, predominantly in Asia. As stated by Piatanesi & Arauzo-Carod (2019) a potential drawback of nearshoring would be the loss in partnerships and networks which is something Didriksons acknowledge as a central part of their sourcing strategy. While at the same time acknowledging the potential risks of offshoring as stated by (Di Stefano et al., 2024), their strategy appears to prioritize established partnerships and quality control at the source, rather than a shift towards nearshoring. Their focus on optimizing sea freight and consolidating shipments aligns with broader sustainability goals but does not indicate a move towards regionalized production.

IKEA, with a significant portion of its production already in Europe due to its reliance on wood-based products, focuses on efficiency within its existing global network and the use of recycled materials, rather than a significant shift in geographical sourcing for textiles. Their establishment of a new factory in Slovakia demonstrates a commitment to European production for certain goods but doesn't necessarily signify a broad nearshoring trend within their textile supply chain, this enforces the views of the newspaper director who suggest that production already established will not move but new investments might locate closer to home region. As explained by UNCTAD (2022) Covid-19 affected the global market significantly and made companies in all areas of business look for solutions that would mitigate risks. One of the solutions IKEA had for the disruptions in international transport was chartering their own vessels to ensure delivery. But this was a temporary solution to what companies believed was a temporary problem. As Magnus, Hedrich, and Ibanez (2024) stated "Global disruptions is starting to become the norm rather than the exception".

## 5.2 Analysis of interviews with shipping companies

The perspectives from the interviewed shipping companies offer further insights into the impact on shipping networks. The first shipping company, a major global container liner, stated that they have not yet been significantly affected by nearshoring trends in the textile industry, attributing this to the still dominant volumes of cargo transported from Asia to Europe and the prevalence of road transport for intra-European movements (Suárez-Alemán et al., 2015). This suggests that while some textile companies may be exploring nearshoring, the overall impact on long-haul container shipping volumes may not yet be substantial.

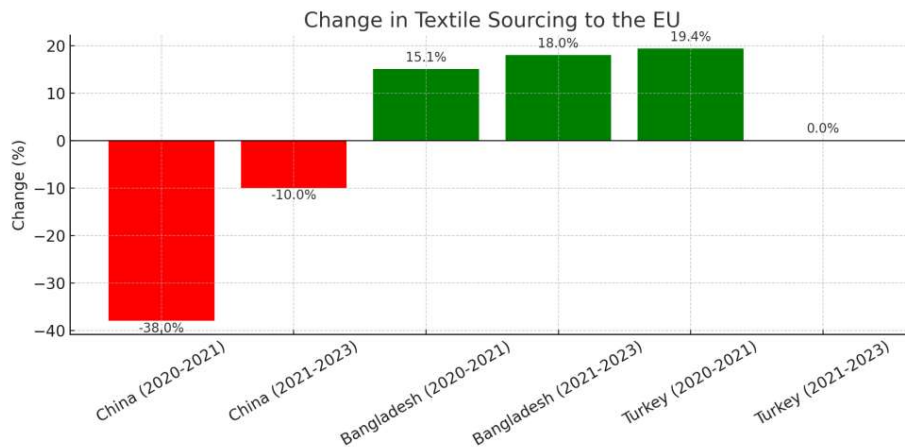
The second shipping company, specializing in ferry routes within Europe and to Turkey, has observed shifts in production locations based on economic competitiveness, citing INDITEX's short-lived increase in Turkish production followed by a move to Egypt when Turkey became more expensive. Which contradicts what García-Alaminos et al. (2024) stated in that north Africa still needed immense infrastructure to be suitable for nearshoring. But as Van Hassel et al. (2022) argues Turkey is a country suitable for nearshoring due to its relationship with Europe and infrastructure which in the context of quickly moving production makes Turkey and east Europe a better option. This demonstrates the dynamic nature of sourcing decisions and how quickly nearshore advantages can change. As stated by Magnus, Hedrich, and Ibanez (2024) nearshoring has been a top priority for textile companies but changes in the global market affect the degree of implementation. The shipping company's monitoring of trade flows and exploration of new routes, such as connecting Turkey and Egypt, indicate a responsiveness to evolving supply chain demands within the European market.

The third global container liner company emphasized flexibility and customer-centricity, stating that they adapt their services to meet customer needs but have not seen a significant increase in demand for shorter intra-European transport. They also highlighted the competition from RORO shipping for short-sea transport due to its higher frequency, which may be a more suitable option for the "just-in-time" supply chain models prevalent in some parts of the textile industry (Suárez-Alemán et al., 2015).

The director of a shipping newspaper confirmed the idea that while nearshoring has been a topic of discussion, large-scale execution has been limited in the textile industry. The cost of transport being a relatively small fraction of the total production cost and the continued growth in Asian markets are cited as reasons for this. The increasing European container trade is noted, but its growth is seen as potentially limited by competition from road and RORO transport. The director also points out that some "nearshoring" activities might be driven by the desire to circumvent trade tolls. The focus for deep-sea shipping companies is on maintaining their revenue through long-haul routes, potentially leading them to enhance reliability and door-to-door services to counteract the nearshoring trend. This enforces what Notteboom et al. (2024) discusses, in that reliability is a big issue within deep sea shipping and with the increase in distance and time from Asia as the Houthi rebels occupy the red sea, reliability issues increase.

### 5.3 Analysis of data on imports of textile to EU

The data on textile imports into the European Union from Euratex (2022) & (2024) provides a broader context. While there was a decrease in sourcing from China between 2021 and 2023, this was largely offset by increases from other Asian countries like Bangladesh, which you can see in Figure 6. The proportion of imports from nearshoring locations within the top 10 EU suppliers remained relatively stable, suggesting that a radical shift away from Asia has not yet materialized. A large increase in sourcing from Turkey could indicate a switch to nearshoring but between 2021 and 2023 the increase in imports from Turkey was only 0,02%. This could indicate that a swift change was made during Covid19 due to the global disruptions but since then no visible relocations have been implemented. Magnus, Ibáñez, Scalco, and Hügl (2024) findings further support this, indicating that nearshoring for European apparel companies has remained flat in practice, with a continued dominance of Asian sourcing.



**Figure 5**  
*Visualisation of changes in textile sourcing in imports to Europe 2020-2023*

### 5.4 Discussion

Overall, the findings suggest that while some textile companies in Europe are indeed exploring and implementing nearshoring strategies, it is not yet a widespread phenomenon that has drastically impacted the established global shipping networks. The drivers for nearshoring stated in the frame of reference, such as the desire for shorter lead times and increased resilience, are acknowledged, but economic factors, existing long-term supplier relationships, and the evolving competitiveness of different production locations continue to play significant roles in sourcing decisions. The impact on liner shipping companies appears to be limited so far, with intra-European transport still heavily reliant on road and facing competition from RORO for short-sea routes. The future of nearshoring in the textile industry will likely depend on a complex interplay of geopolitical stability, cost competitiveness, sustainability pressures, and the strategic priorities of individual companies.

## **6. CONCLUSION**

The purpose of this report was to examine whether textile companies has implemented nearshoring strategies in their operations as a reaction to the COVID-19 pandemic, to what extend they have implemented nearshoring and how this has affected shipping companies.

### **6.1 What indications are there that nearshoring is being implemented by textile manufacturing companies?**

The indications of nearshoring that have been found by analysing the financial and annual reports of the textile companies Ellos Group, IKEA, Lindex AB, Didriksons and MANGO is primarily the increase of factories in Europe between the years 2021-2024. The trend toward nearshoring in the textile industry is notable where there has been a decrease in number of factories in Asia alongside the increase of factories in Europe. A further indication that nearshoring is being implemented is the extension of more production facilities in countries across Europe where the textile companies have not had their factories in before.

### **6.2 What are the main reasons nearshoring is looked upon as an option when setting up supply chains?**

One of the main reasons nearshoring is looked upon as an option is the possibility to reduce reliance of offshoring. Another reason is to enable a reduction of transportation costs and improve a supply chain efficiency by relocating the production facilities closer to the regions closer to their key markets. By moving the production closer, the textile companies can also benefit from the reduced time from production to delivery to customer which also enhances efficiency of the supply chain. Besides the benefits of cost reduction and supply chain efficiency of nearshoring, the textile companies are also responsible to be ethical and sustainable in their decisions when operating. With shorter transportation routes, the textile companies can reduce their carbon emissions and therefor be more sustainable. The textile companies follow the demanded trends from their costumers, which leads to another reason nearshoring is considered since nearshoring facilitates a flexibility due to the shorter production lead times.

### **6.3 How does the shift from offshoring to nearshoring impact liner shipping companies in the context of network planning?**

The shift from offshoring to nearshoring can impact liner shipping companies if the demand for shorter sea transportations becomes greater than sea transportations from Asia to Europe. The increase of implantation of nearshoring could led to reduction in volume for transcontinental routes which could led to liner shipping companies instead focus their network planning on shorter routes. This could lead to liner shipping companies shifting their focus to accommodate regional trade flows by connecting production hubs with end demand locations.

### **6.4 Recommendations for further research**

Further research is needed to achieve a deeper understanding of nearshoring and its long-term impact on the global shipping companies. Further research could be achieved with a broader sample of textile companies to increase the reliability of the result as well as including a wider range of nearshoring strategies. Further research could also include how technological advancements such as automation is supporting their implantation of nearshoring in their operations. Quantitative studies along interviews findings such as carbon emissions, reduction in costs and production lead time before and after nearshoring implantation could also strengthen the analysis of the textile companies' implantation of nearshoring.

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