

What are the opportunities for outerwear apparel in the European market?

The European outerwear market is growing. Outerwear clothing items have more 'wears per item' than most other clothing pieces. This makes quality very important. If you can make the right combination of functionality and fashion, you have good opportunities to explore in the European market. Focusing on specific segments such as high fashion, sportswear or sustainable clothing can also give you a competitive edge.

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1. Product description

Outerwear can be described as any kind of clothing that is worn as the outer layer of clothes, meaning outerwear is exposed to the weather conditions. This study does not include pants, shoes, hats and mittens as outerwear.

This study uses the following codes to indicate trade in outerwear:

Table 1: Product codes

Harmonised System (HS)	Prodcom	Description
6101 6201	14131110 14131120 14132120 14132130	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, including ski jackets, windcheaters, wind-jackets and similar articles
6102 6202	14131310 14131320 14133120 14133130	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, including ski jackets, windcheaters, wind-jackets and similar articles
610331/32/33/39	14131230	Men's or boys' jackets and blazers, knitted or crocheted
610431/32/33/39	14131430	Women's or girls' jackets and blazers, knitted or crocheted

620331/32/33/39	14132300	Men's or boys' jackets and blazers, not knitted or crocheted
620431/32/33/39	14133330	Women's or girls' jackets and blazers, not knitted or crocheted

Quality

Functionality

The main functional requirement for outerwear is that it should protect the wearer from the weather conditions. Outerwear must perform the function it is sold for, for example windcheaters should be wind tight and ski jackets should keep the wearer warm and dry in wintry weather. Outerwear should be adapted to the occasion (formal, sports, festive, etc.) and it has to suit the style of the wearer.

Material

European outerwear consumers expect their outerwear to protect them from the weather. The choice of fabric is key. It also has to be fashionable, soft, non-irritating and have a good drape. Items must be durable, sustainable, and easy to clean and care for.

Key considerations include:

- protection from adverse weather such as wind, rain, snow, sun, UV rays and so on;
- moisture transport or 'wicking' and breathability — properties that keep the body dry by drawing moisture away from the body surface, especially in products that are in direct contact with the skin;
- thermal insulation or heat transport — fabrics with breathable or insulating properties that help the wearer feel cooler in hot weather and warmer in cold weather;
- comfort in relation to body temperature, fabric sensation and freedom of movement;
- easy care, quick-drying, anti-static, lightweight, durable, elastic and strong characteristics;
- anti-bacterial properties that reduce body odour and textile discolouring.

Size

The European apparel industry is pushing for standard sizing legislation, but so far sizing systems vary across Europe. [The European clothing standard EN 13402](#) can provide you with direction. This is a European sizing designation for clothes based on body dimensions and intervals.

The following table shows an example of differences in sizing within Europe. Each column represents the same size in a different system.

Table 2: Sizing across Europe

United Kingdom	Belgium and France	Norway, Sweden, Finland, Denmark, Netherlands and Germany	Portugal and Spain
Size 12	Size 40	Size 38	Size 42/44

Colour and design

Preferences in colour and design of outerwear vary greatly among European consumers. Most European

consumers are attracted to outerwear because of its style and design, often before the main purpose of the outerwear. Most European consumers have more than one piece of outerwear for a particular weather condition. This means that design is as important in outerwear as in other apparel.

Labelling

The most important information on the product label of apparel is:

- size
- origin
- wash and care instructions

The care labelling system developed by [GINETEX](#), the International Association for Textile Care Labelling, is widely used in European countries. The [GINETEX symbols](#) are also very common, but you can only use them under contract with the association.

According to GINETEX, labels should cover the following topics:

- general care and warnings
- washing
- drying
- ironing
- professional textile care or dry-cleaning

Ecolabelling is largely unregulated in the clothing industry. There are several voluntary labels that have their own defined set of standards for producers to follow.

Tips:

Study common care labelling practices in Europe on the [GINETEX](#) website.

If you produce eco-apparel, clearly indicate this with at least one of the available label schemes, such as the [EU Ecolabel](#), to attest the sustainability claims of your product.

For more information on labelling, refer to the [section on buyer requirements](#).

Packaging

Documentation

External packaging documents for apparel should include: producer, consignee, composition, size, number of pieces, box identification, total number of boxes, and net and gross weight.

Importer specification

Each order should be packed according to the importer's instructions. They have their own specific requirements for the use of packaging materials, filling boxes, palletisation and stowing containers. Always ask for the importer's order specifications, which make part of the purchase order.

Damage prevention

Properly packaging apparel minimises the risk of damage. Packaging usually consists of each article being packed in a polybag to protect the fabric from humidity, water, solar radiation and staining.

Dimensions and weight

Packaging must be easy to handle in terms of size and weight and ideally fit together on Euro pallets. Standards are often related to labour regulations at the point of destination, specified by the buyer. When in doubt, check the dimensions and weight of boxes with your buyer.

Cost reduction

European buyers are constantly trying to reduce packaging materials. Less packaging means improved sustainability, but it also reduces costs and increases margins. While packing has to provide maximum protection, you must also avoid using excess materials and 'shipping air'. Waste removal of packaging materials generates additional costs to buyers.

Material

Importers have been steadily banning certain packaging materials for sustainability reasons, as well as to reduce costs with purchasing and disposing of packaging. Economical and sustainable packaging materials are growing more popular. Using biodegradable packing materials can be a market opportunity and, for some buyers, it can even be a requirement.

2. Which European markets offer opportunities for exporters of outerwear?

Europe's outerwear imports are expected to continue increasing, with a substantial share sourced from developing countries. Europe's main importers of outerwear, namely Germany, France, Spain, the United Kingdom and Italy, make interesting focus markets. China is Europe's leading supplier, followed at a large distance by Germany, Italy, Vietnam and Bangladesh.

European consumer demand is increasing

- European demand for outerwear increased between 2013 and 2017 at an average annual growth rate of 3.8%, reaching €7.9 billion in 2017.
- The demand is highest in Germany (€1.4 billion), followed by the United Kingdom (€1.1 billion) and France (€1.2 billion).

What role does the European production play in fulfilling European demand?

- Europe's demand for outerwear is higher than its production. This drives the need for imports, making Europe an interesting market.
- European production of outerwear remained fairly stable between 2013 and 2017 at around €2.9 billion.
- Italy is responsible for 35% of European outerwear production, followed at some distance by Romania (15%), Portugal (15%) and Spain (13%).
- Italian production reduced slightly between 2013 and 2017 at an average annual growth rate of -0.5%.
- Italy is traditionally known for its high-quality clothing. Consumers are more likely to spend more money on good-quality outerwear, so the Italian production is expected to remain stable.

Which countries are most interesting in terms of imports from developing countries?

Figure 1: European imports of outerwear, per source

in € million

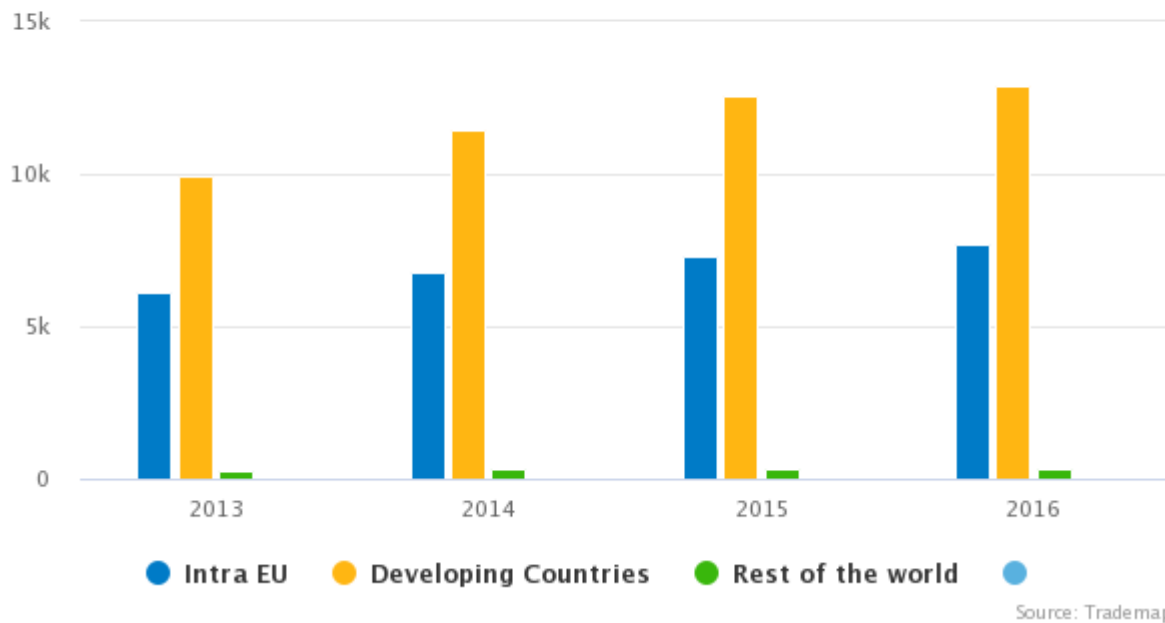


Figure 2: Main European importers of outerwear in 2017, per source

in € million

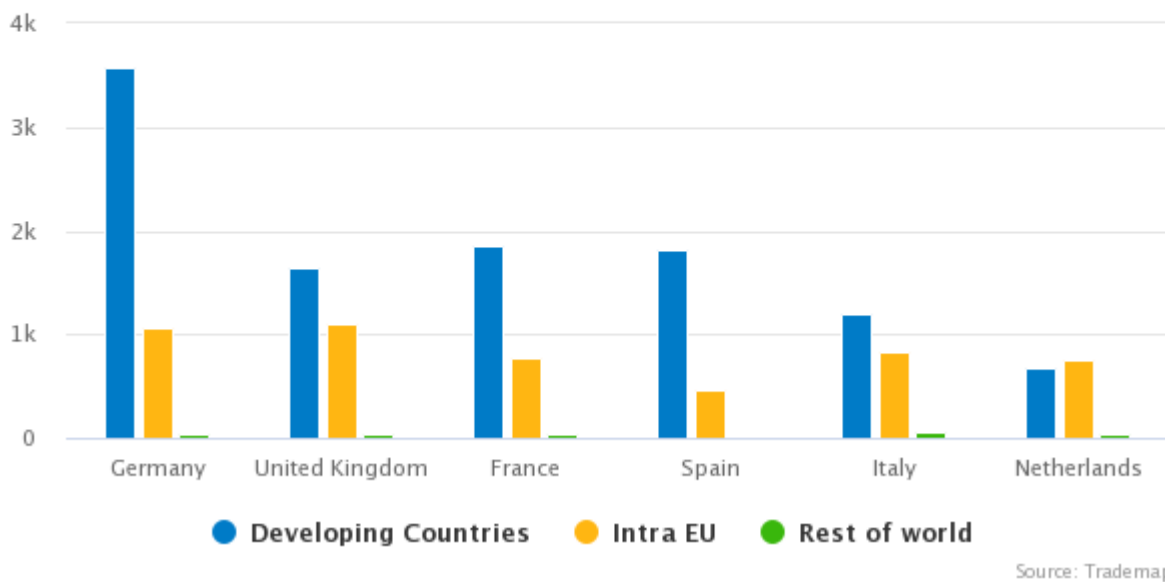
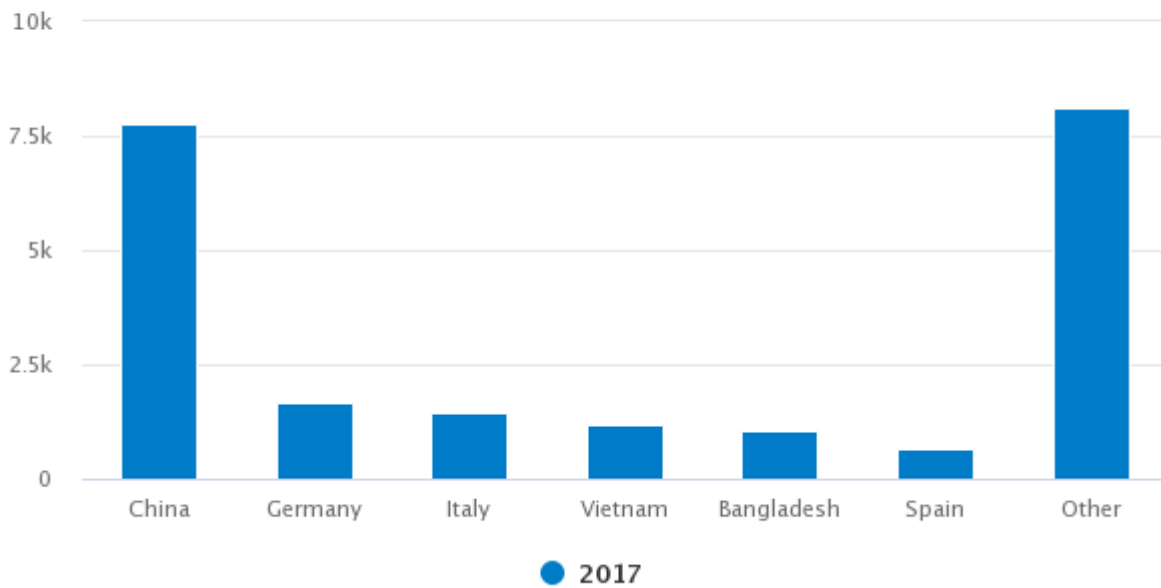


Figure 3: Leading suppliers of outerwear 2017

in € million



Source: Trademap

- European imports of outerwear increased from €16 billion in 2013 to €22 billion in 2016 at an average annual growth rate of 7.5%.
- In the coming years, European imports are expected to keep growing at the same rate.
- Developing countries export €14 billion in outerwear to Europe, which is equivalent to 62% of the total European outerwear imports. This share is expected to remain fairly stable for the coming years.
- Much of the European outerwear imports from other Western European countries are actually re-exports of products originally manufactured in developing countries.
- Germany is Europe's leading importer of outerwear by far, with €4.7 billion in outerwear imports in 2017. The United Kingdom (€2.8 billion) and France (€2.6 billion) follow at some distance.
- When it comes to imports from developing countries, Germany is still leading (€3.6 billion), while France (€1.8 billion) and Spain (€1.8 billion) are second and third.
- Spain and Germany import almost 80% of their outerwear from developing countries.
- China is the leading exporter of outerwear to Europe among developing countries, with a 35% share of all European outerwear imports from developing countries in 2017. Other leading suppliers from developing countries are Vietnam (5.4%) and Bangladesh (4.8%).

Tips:

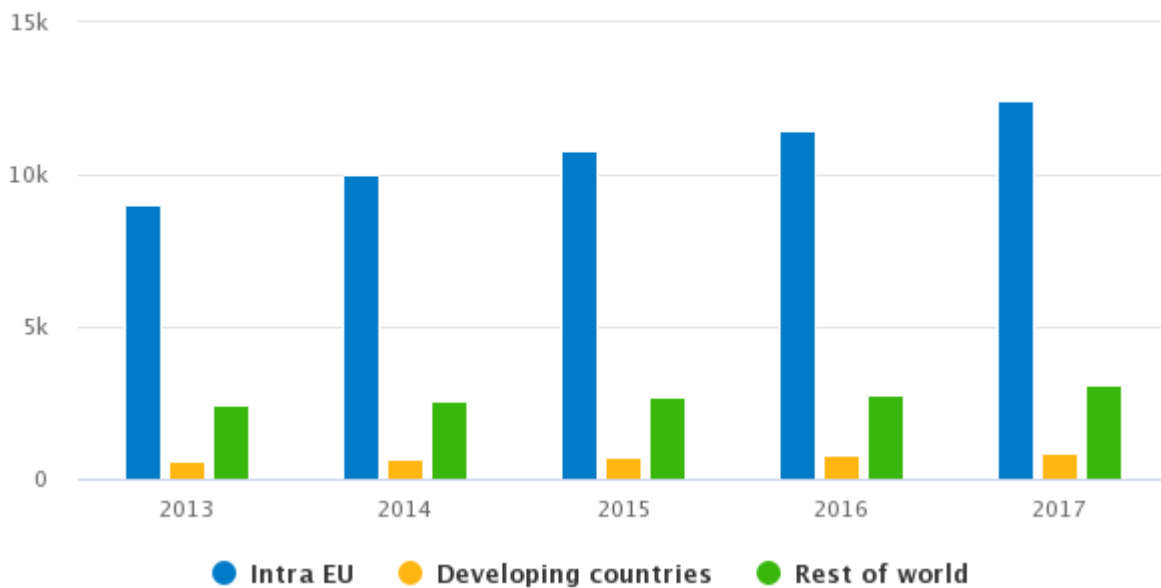
Study your options in Germany, France and Spain, which have high volumes of outerwear imports from developing countries, making them especially interesting markets. Considerable parts of these imports are re-exported to other European destinations, as the big outerwear traders are active in these three countries.

Compare your products and company to the strong competition from China, Vietnam and Bangladesh. You can use the [ITC Trade Map](#) to find exporters per country. You can compare by market segment, price, quality and target countries.

What role does export play in supplying European demand?

Figure 4: European exports of outerwear

in € million



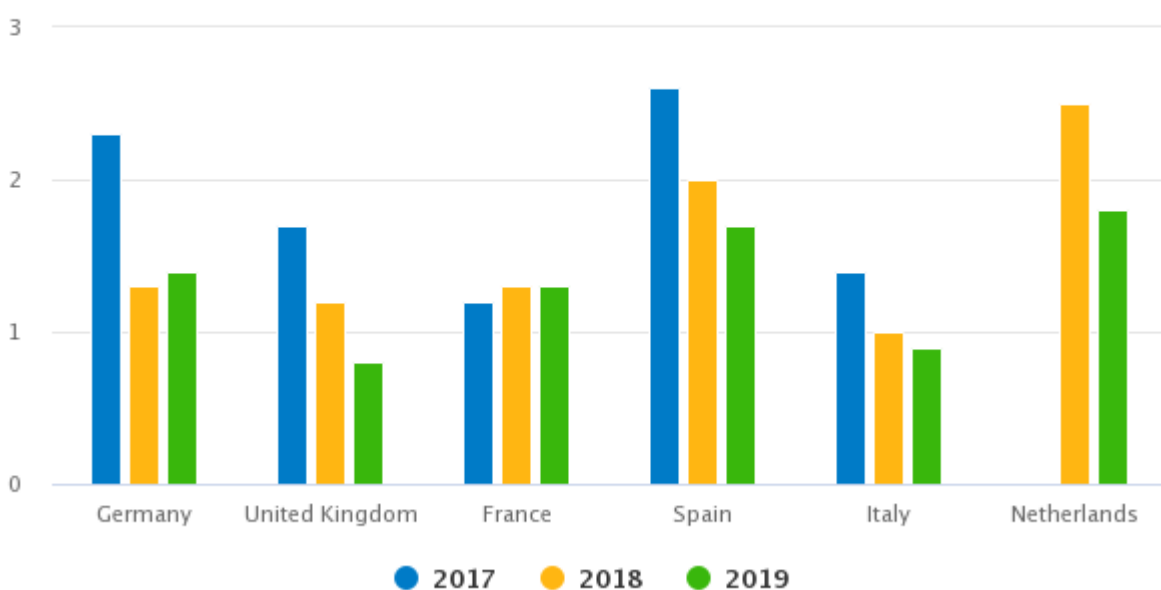
Source: Trademap

- European exports of outerwear consist mainly of trade within Europe.
- Italy (€3.4 billion) is Europe's leading outerwear exporter, followed by Germany (€2.8 billion).

What effect does real private consumption expenditure have on European demand?

Figure 5: Real private consumption expenditure growth

in %



Source: Eurostat

- Private consumption expenditure is an important indicator for the European outerwear market, a sector closely linked to economic conditions. When money is tight, consumers postpone buying non-essential items

until they have more disposable income.

- European private consumption expenditure increased over 2017 and 2018. This trend is expected to continue in 2019. This means that consumption of clothing is likely to rise, especially in emerging markets such as Poland, where the expected private consumption expenditure growth for 2019 is 3.3%. Consumers in mature markets already spend a fair amount of money on apparel, so consumption growth in these markets will be moderate.

For more information on general apparel trade statistics, see our study on [which European markets offer opportunities for exporters of apparel](#).

3. What trends offer opportunities in the European market for outerwear?

Fashion trends

Outerwear includes the clothing items that people wear more often and that others see more often than other clothing items. Looks are therefore very important to consumers at the time of choosing to buy an item of outerwear. Even when outerwear is mainly purchased for a specific, utilitarian purpose such as for skiing or for biking through heavy wind and rain, looks are still important.

Tips:

Be aware of who your end consumers are, how they use your outerwear and what are their reasons for buying it. Although you usually don't sell directly to end consumers, your importer is very aware of consumer needs and has a consumer profile in mind.

Differentiate. Position your product on material or technical excellence. Develop your own design capability, combining your cultural context with market needs. Be a specialist: focus on one product group and be the best in it. Be a good marketer: source new contacts, study your target market, work with your buyers and make trade fairs a structural part of your sales budget. Bring design, production and marketing staff together in the design process.

Sustainability

There is a growing group of conscious consumers in Europe who value social and environmental responsibility, making it an increasingly important aspect of the mid-high to high-end market segments. Using and promoting sustainable materials and recycled fibres is a key way to meet this demand, as well as obtaining corresponding certification and operating in a transparent way.

Tips:

Use sustainable materials and production processes and consider developing sustainable concepts.

Promote your sustainability values to increase your credibility and to boost your marketing.

For more information, see our study on [sustainable apparel](#).

Plus-sized clothing market

Demand for plus-sized or oversized clothing is expected to increase in the coming years. The average body

measurements of the European population show a tendency towards larger sizes. This development is also relevant for the outerwear segment.

Tips:

Although their body size may be increasing, European consumers prefer to look smaller. Design outerwear that flatters the figure of the wearer.

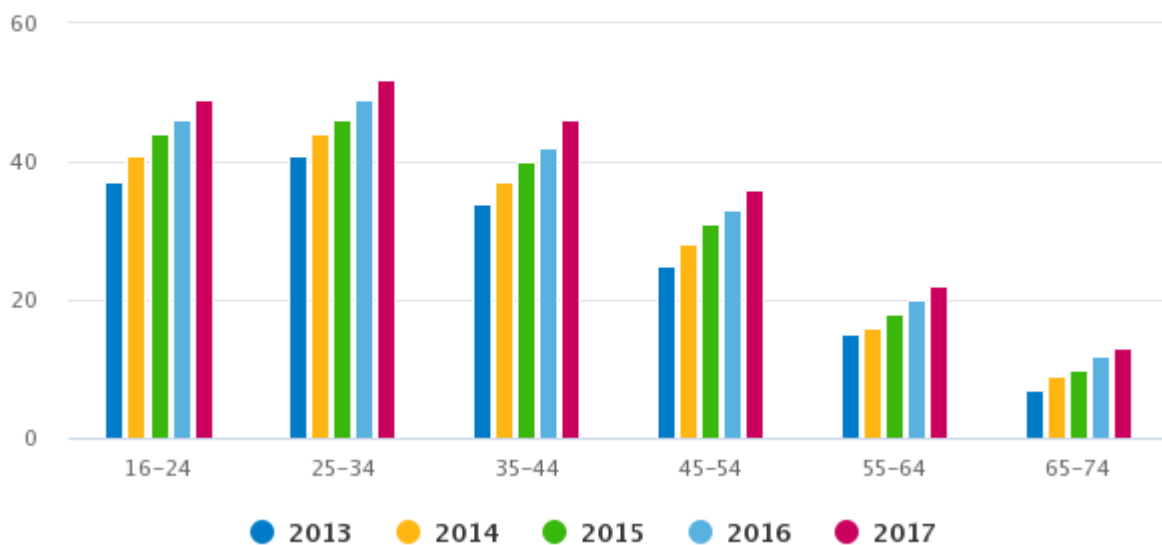
Consider hiring plus-size models to show the larger sizes of your outerwear collection.

E-commerce is on the rise

Online shopping is growing rapidly in Europe across all age and income groups. European consumers increasingly buy online due to the conveniences of home shopping, delivery and price comparison. This means supplying e-commerce retailers can offer good opportunities.

Figure 6: Percentage of individuals who have purchased clothes or sports goods online, by age group

in %



Source: Eurostat

Tips:

Study your options in online retail. For example, identify the popular online retailers in your European target countries.

Target online business-to-consumer retailers if you can meet the additional requirements.

For more information, see our study on [which trends present opportunities and threats in the European apparel market](#).

4. What are the requirements for outerwear products to be allowed on the European market?

What are the legal and non-legal requirements for your product?

General product safety

The European Union's [General Product Safety Directive](#) applies to all consumer products, including apparel. It mandates all products marketed in Europe must be safe to use.

Tips:

Read more about the [General Product Safety Directive](#).

If you produce outerwear for children, check the European standard [EN 14682-2014](#). This standard specifies requirements for cords and drawstrings on children's clothing, including disguise costumes and skiwear.

Use your common sense to ensure normal use of your product does not cause any danger.

The [Safety Gate database](#) lists products that the European Union has rejected at the border or withdrawn from the market. Check the database for similar products to yours to consider issues that may arise.

Packaging legislation

Europe has specific [packaging and packaging waste legislation](#). These requirements aim to prevent the production of packaging waste, promote the reuse of packaging and thereby reduce the final disposal of such waste.

Restricted chemicals: REACH

The [REACH](#) regulation lists restricted chemicals in products that are marketed in Europe. For example, REACH restricts the use of azo dyes and certain flame retardants in textile products.

Tips:

The European Chemical Agency provides useful information and tips on REACH. See for instance [REACH Annex XVII](#) for a list of all restricted chemicals, check the [Information on REACH for companies established outside Europe](#) and the [Q&As on REACH](#).

Follow new developments in the field of flame retardants, as new alternatives are being developed. See for instance the [European Flame Retardants Association](#) (EFRA).

Textile Regulation

According to the European Union's [Textile Regulation](#), textile products should be labelled or marked to indicate their fibre composition in the language of the country where you are selling your products. These labels should be durable and tear resistant, securely attached, easily legible, visible and accessible.

Tip:

For more information, see the [Frequently Asked Questions on the Textile Regulation](#).

Children's clothing

There is a specific standard regarding the [safety of children's clothing](#) intended for children up to the age of 14, which specifically regulates the use of cords and drawstrings. Customs authorities often reject clothes due to risk of suffocation, strangulation and injuries. This applies especially to clothes for children up to seven years old.

Tip:

For children's sustainable apparel, do not use cords in the neck areas, long free ends that can become traps, nor parts that children can easily remove and swallow such as buttons.

What additional requirements do buyers often have?

Sustainability

Social and environmental sustainability make your products stand out in the European market. Think of sustainable raw materials, fair working conditions and production processes. European buyers increasingly demand the following certification schemes and programmes:

- [Amfori Business Social Compliance Initiative \(BSCI\)](#): European retailers developed this initiative to improve social conditions in sourcing countries. They expect their suppliers to comply with the BSCI Code of Conduct. To prove compliance, the importer can request an audit of your production process. Once a company is audited, it is included in a database for all BSCI participants.
- [Ethical Trading Initiative \(ETI\)](#): This initiative is an alliance of companies, trade unions and voluntary organisations, which aims to improve the working lives of people across the globe who make or grow consumer goods.

You can review standards such as [ISO 14001](#), [Sedex](#) and [SA 8000](#) to read up on sustainable options. Check with your potential buyers which certifications they require.

Tips:

Optimise your sustainability performance. Studying the issues addressed by these initiatives will help you focus on the requirements that apply specifically to your product and your business.

Buyers appreciate a well-grounded story. Showing that you value your company's environmental and social performance may provide you with a competitive advantage.

Use a self-assessment tool such as the [BSCI Self-Assessment for Producers](#) or a code of conduct such as the [BSCI Code of Conduct](#) and the [ETI base code](#) to evaluate your performance.

For more information, see our special study on sustainability in the apparel sector.

What are the requirements for niche markets?

Fair trade

The concept of fair trade involves fair pricing and improved social conditions for producers and their communities. Especially when the production of your apparel is labour intensive, fair trade certification can give you a competitive advantage.

Common fair-trade certification awarding organisations include:

- [World Fair Trade Organisation \(WFTO\)](#)
- [Fairtrade International](#)
- [Fair Wear](#)

Tips:

Ask buyers what they might be looking for. Especially in the fair-trade sector, you can use the story behind your product for marketing purposes.

Check the [ITC Standards map database](#) for more information on voluntary standards and their requirements, including fair production.

Sustainable textile certification

Sustainability is gaining ground across the apparel sector and so is interest from buyers for sustainable textile certification.

The [Global Organic Textile Standard \(GOTS\)](#) certifies environmental and social responsibility throughout the production chain. To qualify, textile products must have more than 70% organic fibres.

The [OEKO-TEX Standard 100](#) certification ensures responsible use of chemicals, while the [Sustainable Textile Production \(STeP\) by OEKO-TEX®](#) certification ensures that textile manufacturing and processing takes place in a sustainable manner. Textiles with the [MADE IN GREEN by OEKO-TEX®](#) label are:

- made from materials that have been tested for harmful substances;
- manufactured using environmentally friendly processes;
- produced under safe and socially responsible working conditions.

The [EU Ecolabel](#) for textiles focuses on minimising environmental impact at the manufacturing stage.

Tips:

Read more on [GOTS](#), [OEKO-TEX](#) and the [EU Ecolabel](#) in the ITC Standards Map.

Determine which certification programme would be the best fit for you and apply if possible.

For more information, see our study on [buyer requirements for apparel](#).

5. What is the competition like in the European outerwear clothing market?

The competition in outerwear does not differ significantly from the apparel sector in general. Refer to our [10 tips for doing business with European buyers](#).

6. Through what channels can you get outerwear on the European market?

Market channels

Outerwear is mainly sold via physical shops and retailers, but online sales are growing. In Europe, catalogue shopping is an important purchasing channel.

In general, apparel retailers make up the most commonly used channel for apparel sales in Europe. In most European countries, this channel accounts for 40% to 60% of distribution. Some retailers appeal more to young consumers while others target older demographics. Some retailers target consumers who follow the latest fashions closely while others aim for consumers of basic outerwear.

For high-end segments, product quality in terms of fabric, fit and finishing must be in line with customer expectations. Minimum delivery volumes and terms of payment vary greatly and need to be requested on an individual basis.

Trade associations and fairs

These trade fairs can be useful for finding trading partners in Europe:

- [Apparel Sourcing](#), France;
- [Fashion SVP](#), United Kingdom;
- [ISPO](#), Germany (also has Chinese editions);
- [Munich Fabric Start](#), Germany;
- [Première Vision](#), France.

The European Apparel and Textile Confederation, [EURATEX](#), and the International Apparel Federation, [IAF](#), can also be helpful for finding trading partners in Europe.

Market segments

The market for outerwear can be segmented according to the type of use (functional or fashionable), the type of user and the quality level of the product.

The lower end of the market is known as the fast fashion industry. Speed is important in this segment. European buyers in this segment are looking for fast deliveries from low-cost countries. There are [various ways to speed up deliveries](#).

In the mid-market, style is the all-important factor. Outerwear clothing items have more 'wears per item' than most other clothing pieces. This is particularly true for mid-market segments.

The high or premium end of the market is dominated by design, brand and premium industrial or handmade craftsmanship. High-end consumers express their identities by their choice of outerwear.

7. What are the end market prices for outerwear consumers?

The European consumer price for your apparel will be around four to six-and-a-half times your selling price or even more if you would cater to the high-end segment. Shipping, import and handling add 15-20%. Wholesalers

account for a further 40-70% markup. Retailers may add at least another 90-150% to the price. Finally, European VAT rates range from 18% in Malta to 27% in Sweden.


Your original selling price depends heavily on the availability and cost of raw materials. For example, the average prices of cotton fluctuated considerably in recent years. Occasional increases in the price of raw materials are not directly passed on to the consumer, but do put pressure on exporters, importers and retailers' margins.

Tip:


The perceived value of your product in the chosen segment determines its price. The quality and price of your outerwear must match what is expected in your chosen target segment. To determine your price, study consumer prices in your target segment and adjust your prices accordingly. Understand your segment. Offer a correct marketing mix to meet consumer expectations. Adapt your business model to your position in the market.

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