

# The European market potential for sportswear

Europe's sportswear imports are valued at €19.5 billion and show one of the strongest growth rates among all apparel subsegments with 10.1% per year. Sportswear is growing strongly in Europe because of the social trend towards healthier and more active lifestyles among all age groups, as well as increasing popularity of sportswear worn as casualwear in Europe. Fashion Sportswear is the biggest category in the Sportswear segment accounting for approx. 70 to 75% of its total value, followed by Active Sportswear and Swimwear. The biggest import markets include Germany, France, Italy, the United Kingdom, Spain and the Netherlands.

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## 1. Product description

The Sportswear product segment comprises clothing that is worn in Europe while doing sports and/or exercising. In recent years, there has been an emergence of athleisure or fashion sportswear, which is a cross between sportswear and leisurewear, worn casually due to comfort and versatility. The Sportswear segment can be broken down in the following subsegments: Fashion Sportswear, Active Sportswear and Swimwear.

In this analysis, the Fashion Sportswear subsegment includes anoraks (including ski jackets), windcheaters, wind jackets, and similar, including those knitted or crocheted and non-knitted and non-crocheted, made of materials including wool, fine animal hair, cotton, man-made fibers and other textile materials (HS codes: 61011090, 61012090, 61013090, 61019080, 62019100, 62019200, 62019300, 62019900, 61021090, 61022090, 61023090, 61029090, 62029100, 62029200, 62029300, 62029900), men's and women's track suits both knitted or crocheted and non-knitted and non-crocheted, made of materials including wool, cotton, synthetic fibers, other textile materials (HS codes: 61121100, 61121200, 61121900, 62113100, 62113231, 62113241, 62113242, 62113290, 62113331, 62113341, 62113342, 62113390, 62113900, 62114100, 62114231, 62114241, 62114242, 62114290, 62114331, 62114341, 62114342, 62114390, 62114900).

Active Sportswear includes special sports garments knitted or crocheted of materials including wool, fine animal hair, cotton, man-made fibers and other materials, as well as ski suits, both knitted or crocheted and non-knitted and non-crocheted (HS codes: 61141000, 61142000, 61143000, 61149000, 61122000, 62112000).

Swimwear includes men's and women's knitted and crocheted or non-knitted and non-crocheted swimwear made of synthetic or textile materials with or without a rubber thread (HS codes: 61123110, 61123190, 61123910, 61123990, 62111100, 61124110, 61124190, 61124910, 61124990, 62111200).

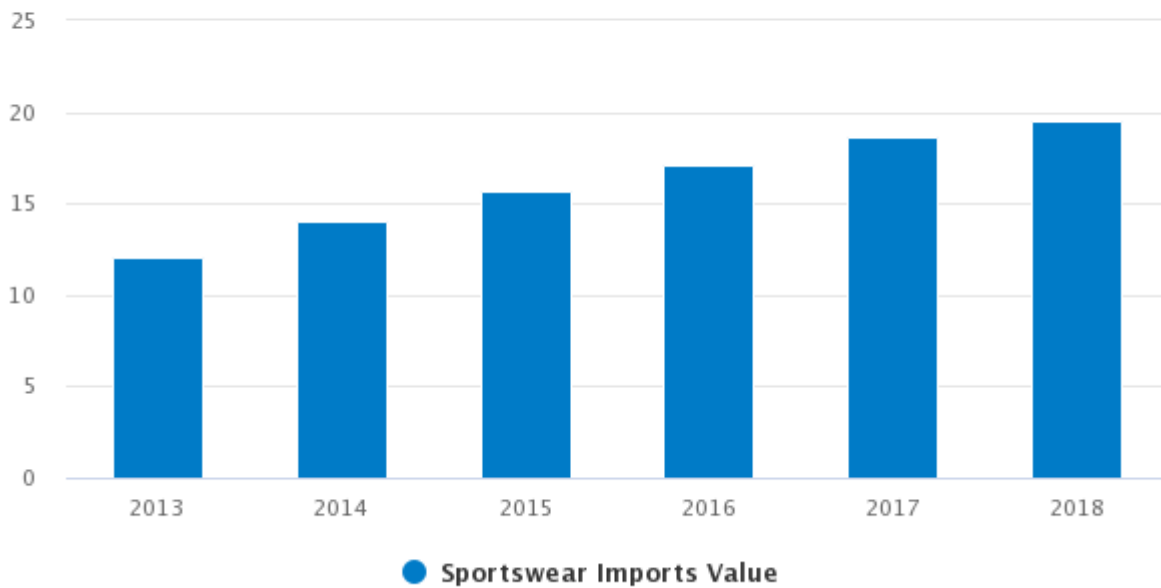
## 2. What makes Europe an interesting market for Sportswear?

Europe is one of the more significant importers of sportswear in the world. In 2018, the value of sportswear imports to Europe accounted for €19.5 billion, up from €12.1 billion in 2013. This corresponded to roughly 1.3 billion units of sportswear clothing in 2018 (up from 908 million in 2013). During the last five years, the value of the EU's sportswear imports has been growing by an average 10.1% annually, which is almost the double of all EU apparel imports as reported in [the CBI Market Statistics and Outlook Study](#), making sportswear and its subsegments the fastest growing apparel product segment groups in the EU and effectively the drivers of the EU market. It is expected that, in the years to come, the demand for sportswear will continue to grow at a high rate due to the fact that the European population is experiencing a strong social shift towards healthy, active lifestyles and increased sports participation among all age groups, and that sportswear is gaining popularity as

an extension of casualwear in fashion.

**Figure 1: European Union Sportswear Imports**

in € billion



Source: Eurostat

The EU is also a large re-exporter of sports apparel. In 2018, it exported €14.4 billion worth of sportswear (up from €9 billion in 2013). EU sportswear exports have been growing at an average yearly rate of 9.7% between 2013 and 2018. The biggest EU exporters in 2018 were Italy (€2.8 billion), Germany (€2.5 billion), France (€1.7 billion), the Netherlands (€1.3 billion), Spain (€1.2 billion) and Belgium (€1.1 billion). Together, these six countries represent over 74% of EU's sportswear exports. Spain, the Netherlands and Germany have seen the strongest export growth within this group, with an average yearly increase between 12.3% and 14.3%. In comparison, France has been growing at a much lower rate, with only 3.2% growth per year in the last five years. Poland, which is currently the eighth largest sportswear exporter in Europe has been growing by an average 19.5% per year. If its growth continues at the same speed going forward, it will become the seventh largest exporter of sportswear within the next two years and enter the top six within the next six years.

## Figure 2: European Union Sportswear Exports

in € billion

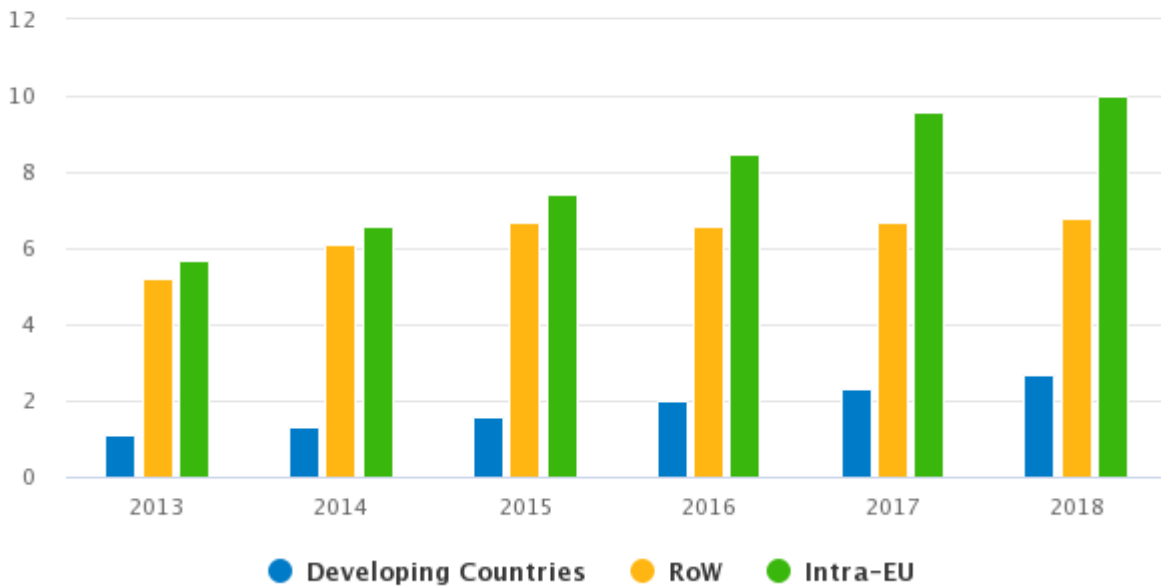


Source: Eurostat

Currently, the value of EU sportswear imports is rather evenly split between sportswear originating from inside the EU and sportswear originating from outside the EU, respectively at 51.4% and 48.6%. In 2018, suppliers from developing countries contributed 13.8% to all sportswear imports into the EU in terms of value (up from 9.2% in 2013) and suppliers from the rest of the world accounted for 34.9% of the import value (down from 43.3% in 2013). The share of the sportswear imported from developing countries is lower than the overall share of EU apparel imports from developing countries, which indicates that there is still unfulfilled potential in the sportswear segment. The value of EU sportswear imports originating from developing countries corresponded to €2.7 billion in 2018 and has grown at an average yearly rate of 19.4% since 2013, almost double of the overall sportswear import growth rate. This demonstrates that there is a strong demand for sportswear from developing countries.

### Figure 3: European Union Sportswear Imports by Origin

in € billion



Source: Eurostat

Europe’s extra-EU sportswear imports are dominated by Asian countries, with China, Bangladesh and Vietnam being the top three exporters. Together, these three countries account for 33.5% of all sportswear imports into the EU. China is the single largest sportswear exporter to the EU with 24.5% of the EU imports value in 2018. It is followed by Bangladesh with 5.1% and Vietnam with 3.9%. Other extra-EU sportswear exporters have market shares between 0.9% and 2.6% of the overall sportswear import value. Bangladesh, Vietnam, Myanmar, Cambodia, Turkey and Morocco increased their share of sportswear imports in the last five years due to a growth rate that was higher than the overall growth rate for sportswear imports. Bangladesh and Myanmar were the strongest growers, both increased their share by ~2.2%. Myanmar has seen the most spectacular growth during that period, with its sportswear exports growing by an average 72.2% each year, taking its exports from €33 million in 2013 to €500 million in 2018. During the same period, China, India, Indonesia and Tunisia have grown at much lower rates than the overall sportswear market, resulting in a decline in market share. Even though these countries experienced growth it was not as strong as the growth that the segment as a whole experienced (10.1%) and consequently their market shares have declined.

The intra-EU sportswear imports are dominated by Germany with a market value of €2.33 billion (equivalent to 11.9% of market share). It is followed by Italy with 5.7%, the Netherlands and Spain with 5.6% each. Germany, Italy, the Netherlands, Belgium, France, the UK, Poland and the Czech Republic have each increased their market shares, although only Germany saw significant growth, with a 2.6% market share increase from 2013 till 2018. Spain and Denmark lost market share during the same time period.

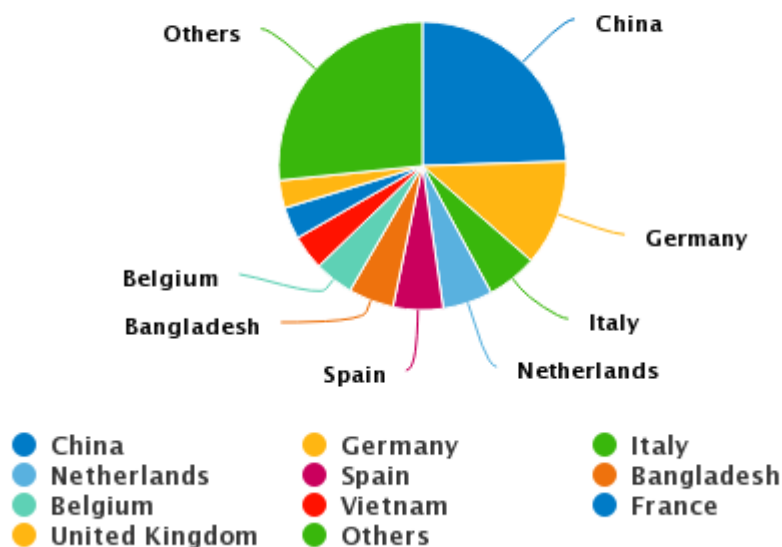
Table 1: Top 10 extra-EU and intra-EU sportswear exporters to EU, 2018 value; average yearly growth

Country	Value	5-yr growth
<b>Top Extra-EU Sportswear Exporters</b>		
China	€4.8 b	↑ 3.8%
Bangladesh	€999 m	↑ 22.9%

Vietnam	€760 m	↑15.2%
Myanmar	€500 m	↑72.2%
Cambodia	€430 m	↑21.7%
Turkey	€406 m	↑12.0%
India	€239 m	↑6.8%
Indonesia	€191 m	0.0%
Morocco	€183 m	↑14.7%
Tunisia	€168 m	↑1.4%
Top Intra-EU Sportswear Exporters		
Germany	€2.33 b	↑15.7%
Italy	€1.11 b	↑10.3%
The Netherlands	€1.10 b	↑10.9%
Spain	€1.09 b	↑8.1%
Belgium	€854 m	↑14.6%
France	€713 m	↑12.4%
United Kingdom	€604 m	↑14.2%
Poland	€562 m	↑18.9%
Denmark	€316 m	↑6.2%
Czech Republic	€263 m	↑24.7%

Source: Eurostat

Figure 4: 2018 Sportswear Imports to the EU by country of origin and % share



Source: Eurostat

### 3. Which European countries offer the most opportunities for sportswear?

Europe is home to some of the world's most prominent sportswear companies, such as Adidas, Puma and Fila. Germany and Italy lead in terms of their number of sportswear companies and brand recognition, but aside from companies that are purely sportswear focused, many fashion brands are also introducing their sportswear offering.

Western European markets are much larger and better developed than Central and Eastern European markets. The top sportswear import markets in the EU are Germany, France, Italy, United Kingdom, Spain and the Netherlands. These top six countries together account for 72.3% of sportswear imports in the EU and have been growing at an average rate of 9.5% per year in the last five years. Other important markets include Belgium with €940 million and 11.1% average yearly growth and Poland with €899 million imports value and a 21.6% average yearly growth. While Eastern European imports are growing at higher rates than those in the West, their numbers are still relatively small. Poland is a market to watch due to its quick growth in imports of sportswear and a relatively large market. If its growth continues at the same level, it will become the seventh largest EU market for sportswear next year. Intersport, Decathlon and Sport 2000 are the largest sports retailers in Europe.

Table 2: Top 10 EU importers of sportswear, 2018 EUR value; average yearly growth

Country	Value	5-yr growth
Germany	€4.2 b	↑ 8.4%
France	€2.3 b	↑ 10.1%
Italy	€2.1 b	↑ 4.2%

United Kingdom	€2.0 b	↑8.4%
Spain	€1.9 b	↑13.9%
Netherlands	€1.7 b	↑16.5%
Belgium	€940 m	↑11.1%
Poland	€899 m	↑21.6%
Austria	€704 m	↑7.8%
Denmark	€441 m	↑6.6%

Source: Eurostat

Table 3: Top 10 EU importers of sportswear from developing countries, 2018 EUR value; average yearly growth

Country	Value of imports from developing countries	5-yr growth	Share of imports from developing countries
Germany	€678 m	↑18.3%	16.2%
Spain	€543 m	↑27.0%	28.7%
United Kingdom	€293 m	↑12.9%	15.3%
Italy	€257 m	↑17.9%	12.4%
The Netherlands	€243 m	↑17.8%	13.9%
France	€227 m	↑10.3%	9.8%
Belgium	€208 m	↑20.8%	22.1%
Denmark	€90 m	↑71.3%	20.4%
Sweden	€41 m	↑19.0%	9.3%
Poland	€33 m	↑58.2%	3.7%

Source: Eurostat

## Germany

Germany is the largest import market for sportswear in Europe. In 2018, the value of its sportswear imports

amounted to €4.2 billion (up from €2.8 billion in 2013). This corresponded to approx. 238 million units of clothing. In the last five years, the value of Germany's sportswear imports has grown at an average rate of 8.4% per year, while the import volume has grown at 5.0% per year. The most popular German sportswear brands include Adidas and Puma, Jako, Reusch, Uhlsport, Schöffel, Ortlieb, and Vaude.

Fashion Sportswear constitutes the bulk of Germany's Sportswear imports. This category accounts for 70.6% of the value (down from 81.7% in 2013) and it has been growing at 5.3% per year in the last five years. The average unit price of Fashion Sportswear imports is at €16.48 which is €0.66 higher than in 2013. The second largest import category is Active Sportswear with a total value of €911 million and an average annual growth of 24.5% in the last five years. Active Sportswear accounts for 21.8% of this market (up from 10.9% in 2013). It is followed by Swimwear with a 7.6% share of the market.

Table 4: 2018 Imports of sportswear to Germany by segment with 5-year growth, average import unit price and 5-year price evolution

GERMANY	2018 Value (€)	5-year growth	Average unit price	5-year price change
Fashion Sportswear	€2.945 m	5.3%	€16.48	+€0.66
Active Sportswear	€911 m	24.5%	n/a	n/a
Swimwear	€317 m	9.1%	€5.39	+€0.54
<b>TOTAL:</b>	<b>€4.173 m</b>	<b>8.4%</b>	<b>€13.73</b>	<b>+€0.40</b>

In the last five years, intra-EU Sportswear imports have been significantly outpacing extra-EU imports (14.5% to 4.0%). The major intra-EU exporters to Germany include the Netherlands, Poland, Italy, the UK and France. Major exporters of Sportswear to Germany from developing countries include China, Bangladesh, Vietnam, Myanmar and Cambodia. China's Sportswear exports to Germany have been declining on average by 1.5% per year for the past 5 years.

## France

France is the second largest market for sportswear in Europe, with a value of €2.3 billion in 2018 (up from €1.4 billion in 2013). This corresponded to approx. 161 million units of clothing in 2018. In the last five years, the value of France's sportswear imports has grown at an average rate of 10.1% per year, while the import volume has grown at 8.1% per year. The most popular French sportswear brands include Lacoste, Lafuma, Eider, Oxbow, Le Coq Sportif, Rossignol, Decathlon, Aigle and Black Crows.

Fashion Sportswear constitutes the bulk of French Sportswear imports. This category accounts for 75% of the value, while Active Sportswear and Swimwear account for 12.5% each. Fashion Sportswear has been growing at 10.4% per year in the last five years compared to 12.4% for Active Sportswear. The average unit price of Fashion Sportswear imports is at €18.31 which is €0.85 lower than in 2013. Major exporters of Sportswear to France from developing countries include China, Vietnam, Tunisia, Bangladesh, India.

Table 5: 2018 Imports of sportswear to France by segment with 5-year growth, average import unit price and 5-year price evolution



FRANCE	2018 Value (€)	5-year growth	Average unit price	5-year price change
Fashion Sportswear	€1.747 m	10.4%	€18.31	-€0.85
Active Sportswear	€288 m	12.4%	n/a	n/a
Swimwear	€289 m	6.7%	€4.42	-€0.40
<b>TOTAL:</b>	<b>€2.324 m</b>	<b>10.1%</b>	<b>€12.66</b>	<b>-€0.22</b>

## Italy

Italy is the third largest import market for sportswear in the EU. In 2018, the value of its sportswear imports amounted to €2.1 billion (up from €1.7 billion in 2013). This corresponded to approx. 109 million units of clothing in 2018. In the last five years, the value of Italy's sportswear imports has grown at an average rate of 4.2% per year, while the import volume has grown at 4.7% per year. The most popular Italian sportswear brands include Fila, Kappa, Lotto, Diadora, Errea, Legea, Macron.

Fashion Sportswear constitutes the bulk of Italy's Sportswear imports. This category accounts for 72% of the value, while Active Sportswear and Swimwear account for 19.0% and 8% respectively. Fashion Sportswear has been growing at 7.4% per year in the last five years. The average unit price of Fashion Sportswear imports is at €22.39 which is €0.86 higher than in 2013. This is the highest average unit price for fashion sportswear in the top six. Major exporters of sportswear to Italy from developing countries include China, Vietnam, Bangladesh, Myanmar and Cambodia.

Table 6: 2018 Imports of sportswear to Italy by segment with 5-year growth, average import unit price and 5-year price evolution

ITALY	2018 Value (€)	5-year growth	Average unit price	5-year price change
Fashion Sportswear	€1.500 m	7.4%	€22.39	+€0.86
Active Sportswear	€397 m	-3.5%	n/a	n/a
Swimwear	€173 m	1.7%	€4.18	-€0.06
<b>TOTAL:</b>	<b>€2.070 m</b>	<b>4.2%</b>	<b>€15.43</b>	<b>+€1.41</b>

## The United Kingdom

The UK is the fourth largest import market for sportswear, with a 2018 value of €1.9 billion (up from €1.3 billion in 2013). This corresponded to approx. 125 million units of clothing in 2018. In the last five years, the value of the UK's sportswear imports has grown at an average rate of 8.4% per year, while the import volume has grown at 2.7% per year. The most popular British sportswear brands include Admiral, Reebok, Umbro, Gilbert, Gola, Gray-Nicolls, Halbro, Sundried, Soar, Iffley Road, Sweaty Betty.

Fashion Sportswear constitutes the bulk of the UK's Sportswear imports. This category accounts for 74% of the value, while Active Sportswear and Swimwear account for 13.0% each. Fashion Sportswear has been growing at 8.6% per year in the last five years, making it the UK's fastest growing segment. The average unit price of Fashion Sportswear imports is at €17.21 which is €3.23 higher than in 2013. Major exporters of sportswear to the UK from developing countries include China, Bangladesh, Vietnam, Cambodia and Turkey.

Table 7: 2018 Imports of sportswear to the United Kingdom by segment with 5-year growth, average import unit price and 5-year price evolution

THE UK	2018 Value (€)	5-year growth	Average unit price	5-year price change
Fashion Sportswear	€1.405 m	8.6%	€17.21	+€3.23
Active Sportswear	€226 m	8.1%	n/a	n/a
Swimwear	€249 m	7.8%	€5.70	+€1.75
<b>TOTAL:</b>	<b>€1.909 m</b>	<b>8.4%</b>	<b>€13.20</b>	<b>+€3.18</b>

The United Kingdom is scheduled to leave the EU this year. Brexit has been postponed till 31 January 2020 and it is currently generating a lot of uncertainty. It is uncertain whether the UK will continue to provide preferential trade conditions for developing countries and how the United Kingdom's exit from the EU will impact the apparel sector and trade.

## Spain

Spain is the fifth largest import market for sportswear in the EU. In 2018, it had sportswear imports valued at €1.9 billion (up from €986 million in 2013). This corresponded to approx. 144 million units of clothing in 2018. In the last five years, the value of Spain's sportswear imports has grown at an average rate of 13.9% per year, while the import volume has grown at 8.5% per year. The most popular Spanish sportswear brands include Joma, Kelme, Luanvi.

Fashion Sportswear constitutes the bulk of Spain's Sportswear imports. This category accounts for 75% of the value, while Active Sportswear and Swimwear account for 15% and 10% respectively. Fashion Sportswear has been growing at 13.9% per year in the last five years. The average unit price of Fashion Sportswear imports is at €13.97, which is €2.02 higher than in 2013. Major exporters of Sportswear to Spain from developing countries include China, Bangladesh, Turkey, Morocco and Vietnam.

Table 8: 2018 Imports of sportswear to Spain by segment with 5-year growth, average import unit price and 5-year price evolution

SPAIN	2018 Value (€)	5-year growth	Average unit price	5-year price change
Fashion Sportswear	€1.418 m	13.9%	€13.97	€2.02

Active Sportswear	€289 m	20.3%	n/a	n/a
Swimwear	€187 m	7.1%	€4.46	€0.52
TOTAL:	€1.894 m	13.9%	€11.18	€2.07

## The Netherlands

The Netherlands is the sixth largest imports market for sportswear in the EU, with a value of €1.7 billion in 2018 (up from €812 million in 2013). This corresponded to approx. 105 million units of clothing in 2018. In the last five years, the value of the Netherlands' sportswear imports has grown at an average rate of 16.5% per year, while the import volume has grown at 8.1% per year. The most popular Dutch sportswear brands include Quick, Hi-Tec and Mogema.

Fashion Sportswear constitutes the bulk of the Netherlands's sportswear imports. This category accounts for 74% of the value (down from 81% in 2013), while Active Sportswear and Swimwear account for 16% and 11% respectively. Fashion Sportswear has been growing at 14.4% per year in the last five years. The average unit price of Fashion Sportswear imports is at €19.98, which is €5.90 higher than in 2013. Major exporters of Sportswear to the Netherlands from developing countries include China, Bangladesh, Vietnam, Myanmar, Indonesia.

Table 9: 2018 Imports of sportswear to the Netherlands by segment with 5-year growth, average import unit price and 5-year price evolution

NETHERLANDS	2018 Value (€)	5-year growth	Average unit price	5-year price change
Fashion Sportswear	€1.286 m	14.4%	€19.98	€5.90
Active Sportswear	€272 m	29.5%	n/a	n/a
Swimwear	€184 m	17.4%	€4.60	€1.20
TOTAL:	€1.742 m	16.5%	€14.09	€3.67

### Tips:

Focus your export efforts on the top six markets: Germany, France, Italy, the United Kingdom, Spain, and the Netherlands because they are both the biggest apparel consumers in Europe and the biggest importers of apparel from developing countries. All of these countries have a high acceptance of extra-EU suppliers. Italy and the Netherlands may be particularly interesting due to the highest average import prices and a positive price evolution over the last five years.

Keep an eye on the development of Brexit especially if you are an exporter to the UK. Check how the free trade agreements are impacted and whether you will be subject to new tariffs or other procedural export difficulties. [Visit the website 'get ready for Brexit'](#) for more information on Brexit and its potential impact on your business.

Consider exporting to Poland, as it is currently Europe's fastest growing importer of apparel and apparel from developing countries, including the sportswear segment.

Consider subcontracting for one of the leading sportswear brands in Europe, e.g. [Adidas](#), [Puma](#), [Decathlon](#), [Fila](#) or [Reebok](#). Start by visiting their websites and reviewing them to understand what the assortment on the European market looks like and what the European sportswear aesthetic is.

## 4. What trends offer opportunities or pose threats for the European Sportswear market?

The European Sportswear market follows the general apparel trends related to sustainability, technological innovation and increased emphasis on corporate and social responsibility. For more information, see the [CBI study on Trends in the Apparel market](#). Aside from these general trends, the sportswear market has its own, segment-specific trends:

### Emergence of athleisure and chic activewear

The boundaries between activewear and fashion sportswear have become increasingly blurred since the 1980s. Many people wear tracksuits or yoga pants and other garments associated with athletic wear as everyday dress. Sportswear is increasingly worn for casual and leisure activities. This mixture in sports and fashion reflects a shift in societal values. All major retailers have adopted sportswear in their collections and are actively targeting customers who value healthy living. One of the most popular and successful athleisure brand is [Lululemon](#), which originated as a yoga brand and successfully graduated to other segments. Other popular activewear brands include FP Movement by Free People, Fabletics, Adidas by Stella McCartney, Vie Active, Sweat Betty.

### Fashion Trends

2019 sportswear fashion trends included animal prints such as leopard print, snakeskin, and zebra stripes as seen at sportswear brands such as [Varley](#), Dharma Bums and Stella McCartney. The animal print is expected to stay for a while. Other trends include color blocking (as seen from [LNDR](#), P.E. Nation and Michi), tie dye/ombré (as seen at [Free People](#), Alala and Electric and Rose) and lilac tones.

### Product innovation

Product innovation in terms of technical features and design is crucial to being competitive on the sportswear market. This includes the creation of lightweight products and breathable products with high-tech materials that optimise functionality. Brands involved in outdoor recreation, fitness and endurance sports have long pursued textiles that regulate body temperature. Most of the materials do so in two ways: increasing breathability to let heat escape and quickly pulling perspiration away from the body after intense activity. Moisture management is a key ingredient in performance base layers and close-to-the skin garments. Manufacturers like the Switzerland based [Schoeller Textil](#) are trying to develop garments with cooling effects built into the yarn, the knit construction and the finishing coating.

### Marketing and Sales

Online sales increased their share of the sportswear market in Western Europe. Customer experience is the most important thing. Customers are increasingly demanding and it is increasingly important to understand customers better and to know what is relevant to them. The quality of marketing is one of the key growth drivers in the sector. This means sponsoring the right athletes and celebrities, having a strong social media presence and effective story-telling skills. Customers are looking for authenticity.

### Sustainability

Most brands will have a sustainability range but there are also brands emerging that put sustainability at the centre of their brand and product. Companies are increasingly using recycled materials like plastic bottles and discarded fishing nets, and other post-industrial nylon (e.g. cycling Sportswear brand [Presca](#)) or using plant

fibers rather than animal materials (for instance, [La Sportiva](#) uses kapok tree fibers as insulation rather than feathers or down). Other sustainability efforts include printing with eco-prints and trying to keep short and transparent supply chains to reduce carbon emissions.

### Tips:

Increase your focus on Fashion Sportswear and Active Sportswear. Europe has a strong demand for these two product categories and is increasingly importing them from developing countries. Inform yourself on the design trends in Fashion Sportswear by observing the most popular brands in the market.


Start innovating in your materials and designs, especially with respect to breathability, weight and washability. Look at the [Premiere Vision's list of Performance Codes](#) to get a good understanding of the different properties and qualities of fabrics, yarns and components.


Consider entering the sustainable sportswear market because it will comprise the future of the European imports. Understand what the buyers' sustainability requirements are and research where and how you can implement them, e.g. through using sustainable materials, implementing more eco-friendly production processes, recycling.


This study has been carried out on behalf of CBI by [M-Brain GmbH](#).

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