

Exporting sustainable apparel to Europe

Europe is a key market for sustainable apparel. There is widespread concern in Europe about environmental issues and a general belief in the value of more sustainable lifestyles. Consumers expect fashion businesses to be responsible regarding social and environmental issues. Important trends in the European sustainable apparel market include consumer education, fashion sharing, vegan clothing, transparency, standardisation and natural dyes.

Contents of this page

1. [Product description](#)
2. [Which European markets offer opportunities for exporters of sustainable apparel?](#)
3. [What trends offer opportunities in the European market for sustainable apparel?](#)
4. [What are the requirements for sustainable apparel to be allowed on the European market?](#)
5. [What additional requirements do buyers often have?](#)
6. [What is the competition like in the European sustainable apparel market?](#)
7. [Through what channels can you get sustainable apparel on the European market?](#)
8. [What are the end market prices for sustainable apparel?](#)

1. Product description

Sustainable apparel is designed, created and produced ethically and responsibly, with consideration for the environmental and social impacts that the product may have throughout its total lifespan. The precise definition of 'sustainable' continues to evolve as consumer awareness increases and as the industry becomes more transparent.

There are no specific HS codes for ethical or sustainable fashion, since you can apply the principles of sustainability to all apparel categories, focusing on the different stages of the product life cycle.

Quality

Functionality

Because sustainable values can be applied across the apparel sector, the desired functionality varies per type of item. In general, fabrics for sustainable apparel should ensure comfort, meaning that items should be soft, non-irritating and have good drape. Sustainable items must be durable and easy to clean and care for.

Material

Materials can range from organic natural materials to sustainable cellulose, protein or wool fibres, as well as manufactured or recycled fibres. These materials should be produced using non-chemical treatments. Fabric content must be appropriate for the garment.

Factors to consider when choosing materials for sustainable apparel are:

- the source and renewability of the fibre;
- the process of turning raw fibre into textiles;
- the working conditions of the people producing the materials;
- the total carbon footprint of the material.

There are several assessment tools that you can use to evaluate and choose the materials you want to work with, such as the [Higg Materials Sustainability Index \(MSI\)](#), the [MADE-BY Environmental Benchmark for Fibres](#) and the Textile Exchange's [Preferred Fiber & Materials \(PFM\) Benchmark](#). To stay up to date on the latest technological developments, you can visit dedicated forums for eco-friendly, innovative or sustainable products at fabric fairs such as [Première Vision](#).

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

Design

Mainstream consumers are attracted to apparel because of its style and design — not because it is sustainable. This means that design is as relevant for sustainable apparel as for general apparel.

Apparel designers and developers can control [more than 80% of a product's environmental impact](#), making design a key aspect of apparel sustainability. Examples of alternative techniques that can help develop sustainable designs are:

- waterless dyeing techniques;
- digital fabric printing;
- using pure fibres;
- using natural dyes.

These techniques can reduce the environmental impact of your items and make recycling easier. You can use assessment tools such as the [Higg Design and Development Module \(DDM\)](#) to receive a design score and learn how to improve the sustainability of your product.

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

sustainable apparel?

European interest in sustainable apparel is on the rise

There is no specific trade or production data available for sustainable apparel. However, the number of sustainable brands is growing and the leading labels and retailers are expanding their portfolio with clothing made with preferred materials.

According to industry experts, Europe is one of the most interesting markets in the world for sustainable apparel. This is because sustainability awareness and initiatives in Europe are growing at many levels at once: among consumers, retailers and business, as well as governments and non-governmental organisations (NGOs). There is a widespread concern about environmental problems and a general belief in the value of more sustainable lifestyles.

However, consumers are not necessarily willing to pay more for sustainable apparel. They expect producers and retailers to improve their sustainability performance without adverse effects on quality, price, design or availability. Pressure from governments and NGOs is resulting in more corporate initiatives in this area. There are regulatory initiatives at national and European level to promote sustainability, such as the [Dutch Agreement on Sustainable Garments and Textile](#).

Experts consider sustainability and responsible innovation to be [by far the biggest trend in the apparel industry](#) right now. Despite sustainable apparel accounting for just a small share of global apparel revenues, its growth signals a major shift. The most successful market players are either niche businesses or more mainstream corporations that combine excellent quality, design and price with appealing sustainability aspects.

[Today's young consumers are more socially and environmentally conscious](#) than previous generations. They have a growing awareness of origin, composition, carbon footprint and other qualities and consequences of the products they purchase.

Around 65–70% of consumers under 35 worldwide choose brands or retailers based on their ethical practices. This implies that among the current 100 million people between 17 and 34 in Europe, approximately 77 million are socially and environmentally conscious consumers. These are the consumers of the future, which illustrates the staying power of sustainable apparel.

Tips:

Define your company's core values, what you feel is important.

Make an inventory of your buyers' sustainability requirements.

Research where and how you can implement these requirements.

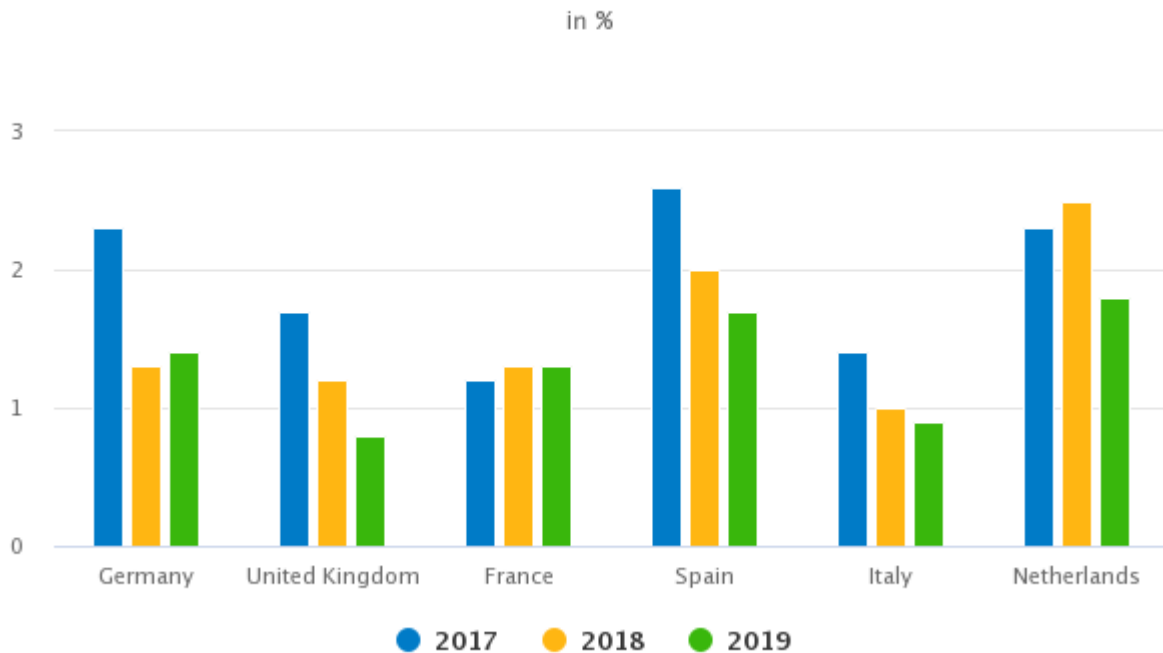
Monitor new developments on sustainability and stay up to date.

Explore recycling as a way to improve your environmental performance and communicate this to your potential buyers.

Look into ways you can add to the recycling efforts of your European buyers, for example, by developing the capacity to process recycled materials yourself or by adding your own recyclables to the production process.

Real private consumption expenditure affects European demand

Figure 1: Real private consumption expenditure growth, by country



Source: Eurostat

Private consumption expenditure is an important indicator for the European apparel 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, which means that consumption of relatively expensive products such as sustainable apparel is likely to rise.

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 sustainable apparel?

Improved consumer knowledge on use and disposal

Much of the impact on sustainability happens during the use and disposal phases of a product's life cycle. In view of that, the European apparel industry has been educating consumers on how their own habits can make a difference. European consumers in all segments are now encouraged to rethink their wardrobes: 'Buy better, buy less' is the current sentiment. This trend leads consumers to invest in a few key clothing items to wear them until the product life cycle ends, which applies to all apparel subsectors.

In addition, a growing volume of discarded clothing is ending up in landfills rather than being reused or recycled. The apparel industry has recently begun to recognise that is critical for it to facilitate recycling as much as possible and to promote consumer awareness to the impacts of clothing disposal. A good example of this tendency is [H&M's 2017 Bring It campaign](#), which is aimed at collecting used clothes, hoping to eventually close the loop on textiles and stop sending garments to landfill altogether.

Government support for waste reduction is also increasing. In 2013, the United Kingdom introduced the [Sustainable Clothing Action Plan](#), with many leading apparel retailers pledging to measure and report the waste,

water and carbon footprints of their clothing products, as well as to reduce their environmental impact by 2020. In 2014, the European Commission announced a [Circular Economy Package](#), in which 're-use, repair and recycling is the norm and waste is a concept of the past'.

Discarded used apparel from Europe is currently sorted to three routes:

1. what is wearable gets sold to countries in Africa and, to a lesser extent, in Eastern Europe;
2. some waste is shredded into insulation materials for the automotive industry;
3. the remainder goes to landfills.

A growing group of companies is developing new businesses to tackle sustainability problems associated with garment waste management. Examples of which include turning old clothing into recycled fibres for new clothing and producing garments from ocean plastics.

Tips:

Research innovative, consumer-oriented programmes such as the [H&M Bring It campaign](#) and [Clever Care](#) to understand key sustainability issues in the European apparel sector.

As a supplier, you can tap into this trend by exploring new waste management solutions yourself. If you promote it effectively, a strong or innovative waste management performance can significantly improve your market position and competitiveness.

The sharing economy is creating new opportunities

The 'buy better, buy less' sentiment has helped boost fashion rental and peer-to-peer fashion sharing services which tap into the consumer's desire to buy fewer clothing items and wear them longer. Sharing offers the added benefit of allowing owners of valuable fashion items to make money by putting them up for rent. The possibility of experiencing a trend without paying a lot of money for it is particularly attractive to millennials and younger consumers.

To consumers, sharing represents a move away from low-cost, throwaway garments towards higher-quality and more durable apparel that is actually worth sharing. This opens up opportunities for durable and high-quality garments in the market.

Tip:

Study the demand for vegan products in your European target markets. Look up for more information the sites of the [Vegan Society](#) and the [European Vegetarian Union](#).

Transparency

Transparency is essential for a sustainable clothing industry. It is impossible for companies to make sure human rights are respected, working conditions are adequate and the environment is safeguarded without knowing where their products are made. Many fashion brands and retailers already make their suppliers' lists public. Some brands and retailers also make available to the public information on the processing facilities where their clothes are dyed, printed, laundered or otherwise finished at an earlier stage of production.

Tip:

Consider making your supplier list public and communicate this to your buyers.

Standardisation

Another trend in sustainable apparel is the push for standardisation. Because there are currently many different certification schemes and standards, companies have been working together at trying to create one tool to accurately measure and score the sustainability performance of a company or product. However, this has been a difficult and slow process.

Tip:

See the Apparel Coalition's [Higg Index](#) for an example of a standardisation initiative.

Using natural dyes

Natural dyes have been traditionally unable to compete with synthetic dyes in most commercial applications, as synthetics are more consistent and available in a wider range of colours. However, [some natural dyes now offer excellent resistance to light, cleaning agents, water and perspiration](#).

Environmental awareness has been the main driver behind the increased use of natural dyes, which do not affect the environment in the same ways synthetic dyes do. The trend towards more personalised fashion may also boost the use of natural dyes, as they can offer unique colourings and shading. Using natural dyes can be a good way to improve your sustainability performance.

Tips:

Study natural dyes options for your products, such as [Ecofoot](#) and [SpinDye](#).

Stay up to date on [new textile dyeing methods that can make fashion more sustainable](#).

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

4. What are the requirements for sustainable apparel 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](#).

Use 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 also 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, particularly those for children up to seven years old.

Tip:

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

5. 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 use standards such as [ISO 14001](#), [Sedex](#) or 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 supports 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](#).

6. What is the competition like in the European sustainable apparel market?

The field of competition in sustainable apparel in Europe is comparable to that of the overall apparel market. However, competition is less fierce because there are fewer competitors offering sustainable apparel. Although most sustainable brands are still niche brands or high-end brands, large and well-known, mid-market brands are also increasingly offering sustainably made products at affordable prices.

Refer to our [10 tips for doing business with European buyers](#).

7. Through what channels can you get sustainable apparel on the European market?

Market channels

In general, apparel retailers make up the most commonly used channel for apparel sales in Europe. This channel accounts for 40% to 60% of distribution in most European countries.

Trade associations and fairs

Most well-known tradeshows have special areas dedicated to sustainable brands and suppliers. These trade fairs are useful sources for finding trading partners in Europe:

- [Fashion SVP](#) sustainability seminars, United Kingdom
- [Innatex](#), Germany
- [Neonyt](#), Germany

These trade associations can also be helpful for finding trading partners in Europe:

- [EURATEX](#), European Apparel and Textile Confederation
- [IAF](#), International Apparel Federation
- [SAC](#), Sustainable Apparel Coalition

Market segments

Sustainable apparel is generally best suited for the mid to high-market segments, where added value and specialisation matter more than at the low end.

8. What are the end market prices for sustainable apparel?

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 100–150% 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.

Sustainable fashion tends to be more expensive than clothing produced using conventional methods. This is due to the efforts that go into minimising the environmental and social impact of growing materials, manufacturing, packaging and shipping products.

Although sustainability increases costs, the [sustainability programme](#) of fashion retailer C&A, for example, has shown that creating a bulk business in bio-cotton can minimise price increases and be a first step towards sustainable production. C&A is now the world's largest buyer of organic cotton.


Tips:

The perceived value of your product in the chosen segment determines its price. The quality and price of your garments must match what is expected in your chosen target segment. Study consumer prices in your target segment to determine and adjust your price accordingly. Use top-down calculation to determine your maximum selling price.


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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