The European market potential for workwear

The Industrial and Occupational Workwear market is worth approx. €2.9 billion in Europe and it is split between Men's Workwear, which accounts for up to 85% of the value, and Women's Workwear, which covers the remaining 15%. The market is growing at an average rate of 7.5% each year. The biggest local importers include Germany, France, the United Kingdom, the Netherlands, Belgium and Italy. The biggest trends in this market include the development of more versatile and wearable pieces, driven by innovations in fibres and technology.

Contents of this page

1. Product description
2. What makes Europe an interesting market for Workwear?
3. Which European countries offer most opportunities for Workwear?
4. What trends offer opportunities or pose threats for the European Workwear market?

1. Product description

Workwear includes Men's and Woman's industrial and occupational workwear, i.e. occupational and protective garments worn at work. Men's industrial and occupational workwear includes ensembles made of cotton, synthetic fibres, and artificial fibres; industrial and occupational jackets and blazers made of cotton, synthetic fibres and artificial fibres; industrial and occupational trousers and breeches made of cotton, synthetic fibres and artificial fibres; bib and brace overalls made of cotton, synthetic fibres or artificial fibres; industrial and occupational clothing made of cotton and man-made fibres (HS Codes: 62032210, 62032310, 62032911, 62033210, 62033310, 62033911, 62034211, 62034251, 62034311, 62034331, 62034911, 62034931, 62113210, 62113310).

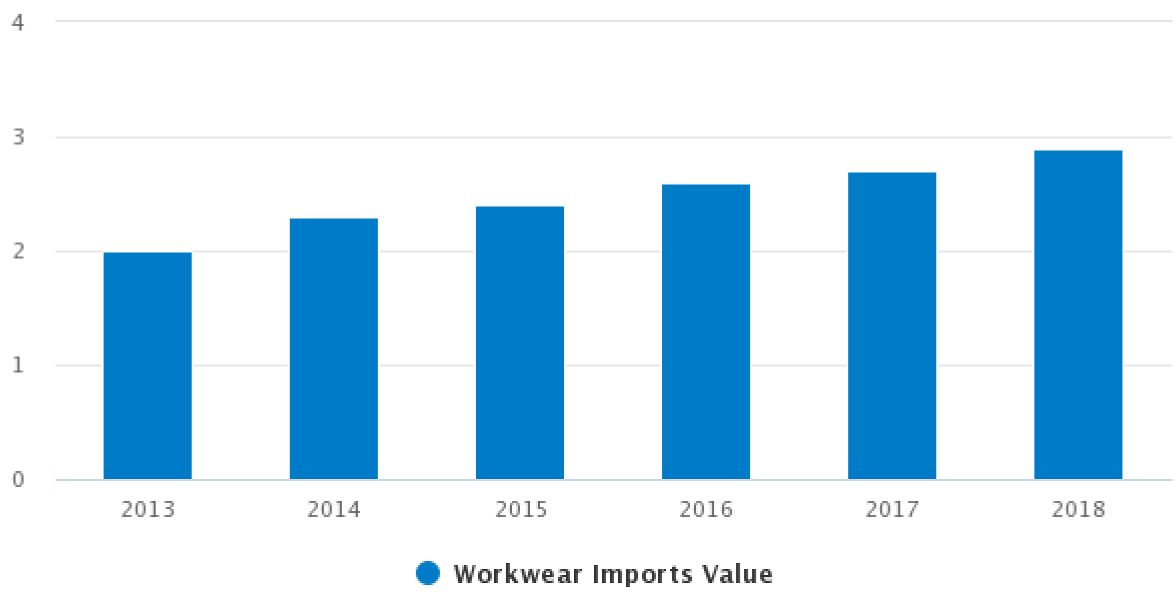
Women's industrial and occupational ensembles made of cotton, synthetic fibres, artificial fibres; industrial and occupational jackets and blazers made of cotton, synthetic fibres or artificial fibres; industrial and occupational trousers and breeches made of cotton, synthetics fibres and artificial fibres; industrial and occupational bib and brace overalls made of cotton, synthetic fibres and artificial fibres; aprons, overalls, smock-overalls and other industrial and occupational clothing made of cotton and man-made fibres (HS Codes: 62042210, 62042310, 62042911, 62043210, 62043310, 62043911, 62046211, 62046251, 62046311, 62046331, 62046911, 62046931, 62114210, 62114310).

2. What makes Europe an interesting market for Workwear?

Europe is one of the more significant importers of workwear in the world. In 2018, the value of workwear imports to Europe accounted for €2.9 billion, up from €2.0 billion in 2013. This corresponded to roughly 162 million units of workwear clothing in 2018 (up from 133 million in 2013). During the last five years, the value of the EU's workwear imports has been growing on average by 7.5% annually, which is above the overall 5.8% imports growth for the entire apparel industry, as reported in the CBI Market Statistics and Outlook Study. It is expected that in the years to come, the demand for workwear will continue to grow at a similar rate. The increase in demand for specialist protective clothing is a result of the European safety legislation.

Figure 1: European Union Workwear Imports

in € billion

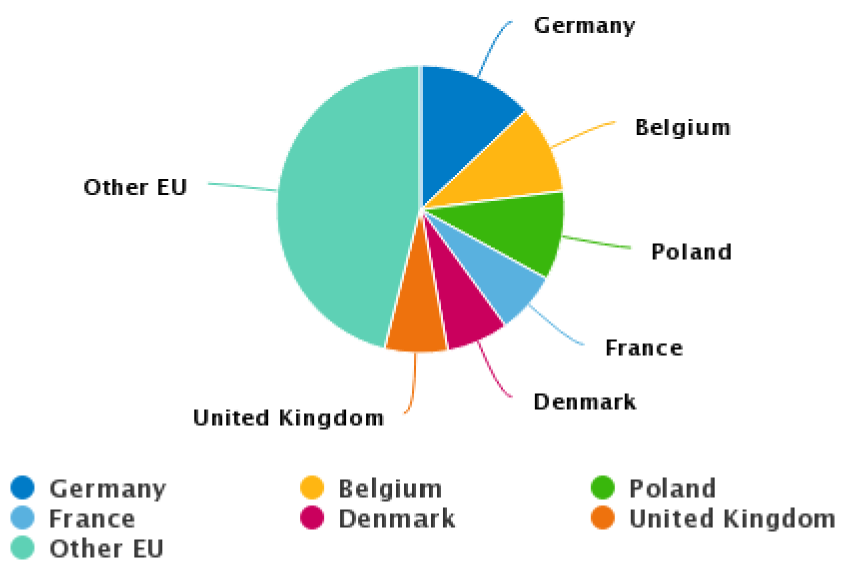


Source: Eurostat

The EU is also a large re-exporter of workwear. In 2018, it exported €1.7 billion worth of workwear apparel (up from €1.2 billion in 2013). EU workwear exports have been growing at an average yearly rate of 6.8% between 2013 and 2018. The biggest EU exporters in 2018 were Germany (€216 million), Belgium (€173 million), Poland (€159 million), France (€121 million), Denmark (€116 million) and the United Kingdom (€113 million). Together, these six countries represent over 54% of the EU's workwear apparel exports. Germany and Poland have seen the strongest export growth within this group, with an average yearly increase between 12.1% and 12.8%. In comparison, Belgium, Denmark and France have been growing at a much lower rate, with only a 4 to 5% growth per year in the last five years.

Figure 2: European Union Workwear Exports 2018

in %



Source: Eurostat

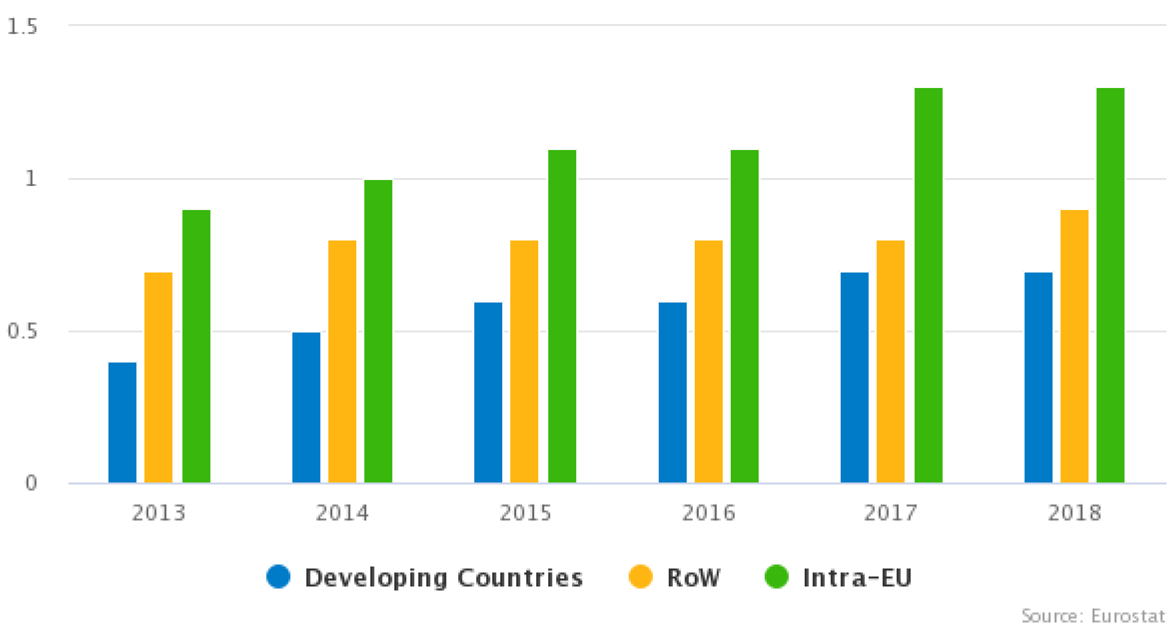
Figure 3: European Union Workwear Exports

in € billion

Currently, 55% of EU workwear imports originate in extra-EU countries and 45% originates in intra-EU countries. In 2018, suppliers from developing countries contributed 25.0% to all workwear imports into the EU in terms of value (up from 20.7% in 2013) and suppliers from the rest of the world accounted for 30.5% of the import value (down from 33.8% in 2013). The value of EU workwear imports originating from developing countries corresponded to €719 million in 2018 and has grown at an average yearly rate of 11.6% since 2013. This demonstrates that there is a strong demand for workwear from developing countries.

Figure 4: European Union Workwear Imports

in € billion



Europe's extra-EU workwear imports are dominated by China, Tunisia and Bangladesh. Together, these three countries account for 26.8% of all workwear imports into the EU. China is the single largest workwear exporter to the EU with 12.7% of the EU imports value in 2018. It is followed by Tunisia with 8.9% and Bangladesh with 5.2%. Other extra-EU Workwear exporters have market shares between 1.3% and 3.7% of the overall workwear import value. Bangladesh, Vietnam, Pakistan, Laos and Sri Lanka increased their share of workwear imports in the last five years due to an above average growth. Bangladesh was the only country to show truly strong growth during this period, increasing its share by about 3.6%. Its workwear exports to the EU grew by an average 36.9% each year, taking its exports from €31 million in 2013 to €148 million in 2018. During the same period, China, Tunisia, Morocco, India and Madagascar have grown at much lower rates that the overall workwear import growth, resulting in a decline in market share.

The intra-EU workwear trade is dominated by Germany, Belgium and Poland. 16.9% of the total intra-EU workwear imports originates in these three markets. They are followed by France with 3.4%, Denmark with 3.3% and Sweden with 3.0%. Germany, Poland, France and Sweden have each increased their market shares, although only Poland and Germany showed significant growth. Belgium, Denmark and the Netherlands lost market share during the same time period.

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

Country	Value	5-yr growth
Top Extra-EU Workwear Exporters		
China	€366 m	↑2.7%
Tunisia	€257 m	↑5.3%
Bangladesh	€148 m	↑36.9%
Vietnam	€106 m	↑7.8%
Morocco	€105 m	↑3.6%
Pakistan	€72 m	↑13.7%
Laos	€70 m	↑18.0%
Sri Lanka	€51 m	↑13.3%
India	€47 m	↑0.6%
Madagascar	€48 m	↑6.0%
Top Intra-EU Workwear Exporters		
Germany	€210 m	↑9.9%
Belgium	€156 m	↑6.8%

Poland	€119 m	↑17.3%
France	€97 m	↑8.5%
Denmark	€94 m	↑5.9%
Sweden	€85 m	↑10.4%
Netherlands	€78 m	↑0.9%
Macedonia	€72 m	↑8.0%
Portugal	€49 m	↑2.9%
Czech Republic	€47 m	↑7.0

Source: Eurostat

3. Which European countries offer most opportunities for Workwear?

Western European markets are much larger and better developed than Central and Eastern European markets. The top workwear import markets in the EU are Germany, France, United Kingdom, the Netherlands, Belgium and Italy. These top six countries together account for 66.7% of workwear imports in the EU and have been growing at an average rate of 7.0% per year in the last five years. Other important markets include the United Kingdom with €253 million and 3.6% average yearly growth and the Netherlands with €240 million imports value and a 14.6% average yearly growth. While Eastern European imports are growing at higher rates than those in the West, they are all still relatively small.

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

Country	Value	5-yr growth
Germany	€620 m	↑7.9%
France	€424 m	↑5.0%
United Kingdom	€253 m	↑3.6%
Netherlands	€240 m	↑14.6%
Belgium	€197 m	↑3.8%
Italy	€184 m	↑10.5%
Sweden	€140 m	↑6.3%

Spain	€113 m	↑8.5%
Poland	€99 m	↑5.0%
Denmark	€93 m	↑13.3%

Source: Eurostat

Table 3: Top 10 EU importers of workwear 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
France	€170 m	↑7.3%	40.2%
Germany	€148 m	↑14.8%	23.9%
United Kingdom	€92 m	↑11.9%	36.2%
Belgium	€72 m	↑3.1%	36.4%
Italy	€59 m	↑16.8%	32.2%
Spain	€47 m	↑7.0%	41.8%
Netherlands	€47 m	↑18.3%	19.6%
Sweden	€34 m	↑26.6%	24.6%
Denmark	€14 m	↑16.3%	15.3%
Austria	€13 m	↑57.7%	9.9%

Source: Eurostat

Germany

Germany is the largest economy in Europe and is currently operating at nearly full employment. It is one of the world's largest producers of iron, steel, coal, cement, chemicals, machinery, vehicles, machine tools, electronics food and beverages and textiles. However, it is entering a period of economic slowdown which will have some impact on the workwear market, meaning that the imports growth will potentially slow down.

Currently, Germany is the largest import market for workwear in Europe. In 2018, the value of its workwear imports amounted to €620 million (up from €425 million in 2013). This corresponded to approx. 30 million units of clothing. In the last five years, the value of Germany's workwear imports has grown at an average rate of 7.9% per year, while the import volume has grown at 3.8% per year. During the same time, the value of imports from developing countries has grown on average at 14.8% per year with workwear from developing countries constituting approx. 24% of Germany's imports in this product segment.

Men's Workwear constitutes 85% of this segment (up from 81% in 2013) and while it is growing quickly, its unit prices are significantly lower than those of the Women's Workwear segment (€19.84/unit for men's workwear vs. €27.07/unit for women's workwear). At the same time, Women's Workwear unit prices have been undergoing a negative price development (declining by 20% since 2013), while in the same timeframe, Men's Workwear import unit prices grew by nearly 30%.

Table 4: 2018 Imports of workwear 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
Men's Workwear	€529 m	8.9%	€19.84	+€4.54
Women's Workwear	€91 m	2.7%	€27.07	-€6.87
TOTAL:	€620 m	7.9%	€20.65	+€3.60

The main workwear brands in Germany include Engelbert Strauss, BP, Planam and Nitras.

France

France is the second largest import market for workwear in Europe. In 2018, the value of its workwear imports amounted to €424 million (up from €332 million in 2013). This corresponded to approx. 19.4 million units of clothing. In the last five years, the value of France's workwear imports has grown at an average rate of 5.0% per year, while the import volume has grown at 6.4% per year. During the same time, the value of imports from developing countries has grown on average at 7.3% per year with workwear from developing countries constituting approx. over 40% of France's imports in this product segment. France is currently the top importer of workwear from developing countries.

Men's Workwear constitutes 84% of workwear imports in France (up from 82% in 2013) and is growing at 5.5%, which is higher that the Women's Workwear segment. Men's Workwear unit prices are significantly lower than Women's Workwear prices (€21.12/unit for men's workwear vs. €26.51/unit for women's workwear). Both categories are undergoing a negative price development, however, declining by approx. 6% since 2013.

Table 5: 2018 Imports of workwear 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
Men's Workwear	€355 m	5.5%	€21.12	-€1.31
Women's Workwear	€69 m	2.8%	€26.51	-€1.73

TOTAL:	€424 m	5.0%	€21.84	-€1.45

The main workwear brands in France include Vetra, Dolmen, SNV.

The United Kingdom

The UK is the third largest import market for workwear in Europe. In 2018, the value of its workwear imports amounted to €253 million (up from €213 million in 2013). This corresponded to approx. 16.2 million units of clothing. In the last five years, the value of the UK's workwear imports has grown at an average rate of 3.6% per year, while the import volume has declined at 13.9% per year. During the same time, the value of imports from developing countries has grown on average at 11.9% per year with workwear from developing countries constituting more that 36% of the UK's imports in this product segment.

Men's Workwear constitutes 81% of workwear imports (up from 73% in 2013) and is growing at 5.9% every year, while the Women's Workwear segment is declining. Men's Workwear unit prices are significantly lower than Women's Workwear prices, with an almost €6 difference per unit. Both segments have undergone a positive price development in the last 5 years.

Table 6: 2018 Imports of workwear to the United Kingdom by segment with 5-year growth, average import unit price and 5-year price evolution

UNITED KINGDOM	2018 Value (€)	5-year growth	Average unit price	5-year price change
Men's Workwear	€205 m	5.9%	€14.77	+€6.28
Women's Workwear	€49 m	-3.6%	€20.65	+€17.02
TOTAL:	€253 m	3.6%	€15.62	+€9.41

The main workwear brands in the UK include Dickies Workwear, Portwest and Click Workwear.

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.

The Netherlands

The Netherlands is the fourth largest import market for workwear in Europe. In 2018, the value of its workwear imports amounted to €240 million (up from €122 million in 2013). This corresponded to approx. 12.4 million units of clothing. In the last five years, the value of the Netherlands' workwear imports has grown at an average rate of 14.6% per year, while the import volume has grown at 16% per year. During the same time, the value of imports from developing countries has grown at an average 18.3% per year with workwear from developing countries constituting nearly 20% of the Netherlands' imports in this product segment.

Men's Workwear currently constitutes 81% of the workwear imports in the Netherlands (up from 87% in 2013). Women's Workwear has been outpacing Men's Workwear in terms of growth with a yearly average increase of 23.5%. Men's Workwear import unit prices are lower than Women's Workwear prices. Both segments have undergone a negative price development in the last 5 years, with the Women's segment declining by more than 17% in the last 5 years and Men's segment declining by 5.5%.

Table 7: 2018 Imports of workwear 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
Men's Workwear	€195 m	13.0%	€18.94	-€1.09
Women's Workwear	€45 m	23.5%	€22.01	-€4.54
TOTAL:	€240 m	14.6%	€19.45	-€1.24

The main workwear brands in the Netherlands include Groenendijk, Heigo, Original Roots, Hydrowear, Tricorp, Havep.

Belgium

Belgium is the fifth largest import market for workwear in Europe. In 2018, the value of its workwear imports amounted to €197 million (up from €164 million in 2013). This corresponded to approx. 8.6 million units of clothing. In the last five years, the value of Belgium's workwear imports has grown at an average rate of 3.8% per year, while the import volume has grown at 6.9% per year. During the same time, the value of imports from developing countries has grown on average at 3.1% per year with workwear from developing countries constituting over 36% of Belgium's imports in this product segment.

Men's Workwear currently constitutes 78% of workwear imports in Belgium (down from 81% in 2013). Women's Workwear has been outpacing Men's Workwear in terms of growth with a yearly average increase of 6.7%. Men's Workwear import unit prices are significantly lower than Women's Workwear prices, and they have undergone a negative price development in the last five years.

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

BELGIUM	2018 Value (€)	5-year growth	Average unit price	5-year price change
Men's Workwear	€153 m	3.0%	€19.34	-€5.18
Women's Workwear	€44 m	6.7%	n/a	n/a
TOTAL:	€197 m	3.8%	€22.92	-€3.72

The main workwear brands in Belgium include Microgard and Sioen.

Italy

Italy is the sixth largest import market for workwear in Europe. In 2018, the value of its workwear imports amounted to €183 million (up from €111 million in 2013). This corresponded to approx. 13.6 million units of clothing. In the last five years, the value and volume of Italy's workwear imports have both grown at an average rate of 10.5% per year. During the same time, the value of imports from developing countries has grown on average at 16.8% per year, with workwear from developing countries constituting over 32% of the Italy's overall workwear imports.

Men's Workwear currently constitutes 80% of the workwear imports in Italy (down from 84% in 2013). Women's Workwear has been outpacing Men's Workwear in terms of growth with a yearly average increase of 15.4%. Men's Workwear import unit prices are lower than Women's Workwear prices. While Women's Workwear has undergone a positive price development in the last 5 years and grew by 20%, the Men's segment has declined by 4% in the last 5 years.

Table 9: 2018 Imports of workwear 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
Men's Workwear	€146 m	9.4%	€12.98	-€0.54
Women's Workwear	€37 m	15.4%	€15.84	+€2.67
TOTAL:	€183 m	10.5%	€13.47	+€0.01

The main workwear brands in Italy include Sir Safety, Siggi Group, Klopman and Cast Bolzonella,

Tips:

Focus your export efforts on the top six markets: Germany, France, the United Kingdom, the Netherlands, Belgium and Italy because they are both the biggest workwear consumers in Europe and the biggest importers of workwear from developing countries. All of these countries have a high acceptance of suppliers from outside the EU. France, Germany and Belgium may be particularly interesting as they have had the highest average import prices over the last five years.

Check the websites of the main providers for each country to understand the workwear requirements and aesthetics for different sectors.

Consider exploring the Women's Workwear segment as its unit prices are much higher than Men's Workwear unit prices. This segment is also showing high growth in Italy and the Netherlands.

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.

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

The European workwear 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 workwear market has its own, segment-specific trends:

Innovations in wearability and user comfort

There is an increased demand for lighter protective apparel and equipment because the more comfortable the protective garment, the greater the chance that the workers will wear it. The key is to create products that provide the appropriate amount of protection, while being lightweight. Fabric manufacturers have increasingly been incorporating properties such as flex and stretch, as well as increasing the garment softness and breathability to improve the wear comfort. Innovations around comfort without sacrificing the protective characteristics will continue to be the major focus in the coming years.

New technologies and fibres

The need for lighter workwear garments has driven the innovations in textiles used and in garment design with manufacturers working on smarter textiles for protective clothing. There are significant advances in fabric technology used with regards to waterproof protection and chemical resistance. For instance, flame-resistant fabrics are now often double treated to make sure that all materials are properly coated. The use of 3D printing to replace traditional knitting will soon alter the way protective clothing components are constructed.

Designing multifunctional garments

Improvements in fibres and technologies allow companies to produce protective clothing that is suitable for multi-hazard environments, meaning workers can wear a single garment and be protected against concurrent hazards. For instance, inherent and treated fabrics are combined with liquid-proof membranes to protect against specific hazards such as hydrocarbon flash fire, electric arc flash and chemical splash, as well as steam and hot liquid.

Tips:

- Research the latest technologies in protective clothing and apply them in your production. You can read about the most current news and trends concerning workwear in the Health & Safety International – The Journal for Employee Protection. Trade fairs such as A+A and Arbeits Sicherheit Schweiz would be a good opportunity to help you understand the offering and demand in the European market. For an overview of the trade fairs for occupational safety and work clothing, visit TradeFairDates.
- Design protective clothing with comfort in mind, offering flex, stretch and increased softness, without compromising the safety
- Design products that are multifunctional and can protect workers against multiple hazards, such as fires and chemical splashes
- Understand the different standards of workplace hazards. When it comes to flame resistance, for instance, there are different standards for workers who may be exposed to flash fire hazards, electricians and emergency services personnel.
- Take all European standards for functional and technical workwear into account, including BS EN 1149 Protective clothing, electrostatic properties, BS EN 13034 Protective clothing against liquid chemicals, ISO 20471 high-visibility clothing, etc. You can find more information on the European standards for protective clothing on the European Committee for Standardization website under committee CEN/TC 162 – Protective clothing including hand and arm protection and lifejackets.

This study has been carried out on behalf of CBI by M-Brain GmbH.

Please review our market information disclaimer.