The European market potential for fashion sportswear

Last updated:
05 July 2022

The Fashion Sportswear market is worth approximately €12.1 billion in Europe, and it is split between Anoraks, which accounts for up to 81% of the value, and Tracksuits, which covers the remaining 19%. The market is growing at an average rate of 2.7% each year.

The European Fashion 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 and Opportunities in the Apparel market. Aside from these general trends, the Fashion Sportswear market has its own, segment-specific trends: Emergence of athleisure and chic activewear, Fashion Trends, Product innovation, Marketing and Sales and sustainability.

Contents of this page

1. Product description

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 its comfort and versatility. The Fashion Sportswear segment can be broken down in the following subsegments: Anoraks (including anoraks, overcoats, windcheaters, and jackets), and Track Suits.In this analysis, the Fashion Sportswear subsegment includes Men´s or boy´s and women´s or girl´s 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).

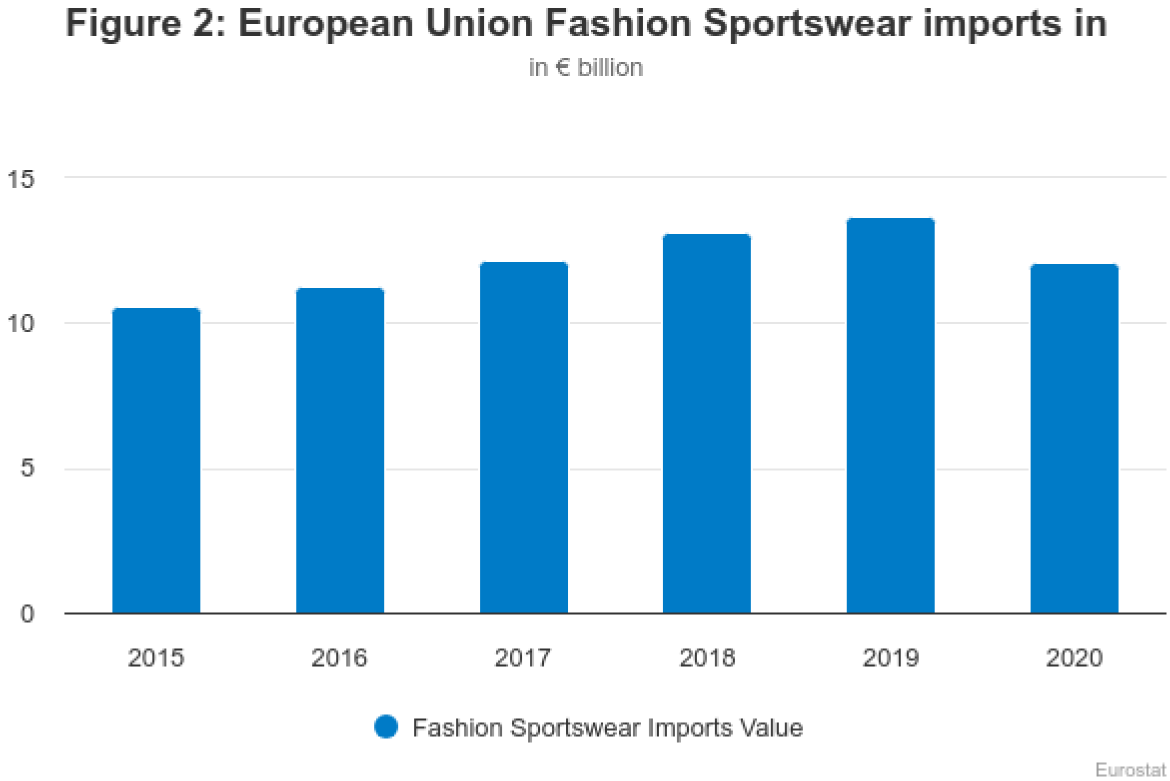
Men’s or boy´s and women’s or girl´s track suits both knitted or crocheted and non-knitted and non-crocheted, made of materials including wool, cotton, synthetic fibers, other textile materials (HS codes: 61121100, 61121200, 61121900, 62113100, 62113231, 62113241, 62113242, 62113290, 62113331, 62113341, 62113342, 62113390, 62113900, 62114100, 62114231, 62114241, 62114242, 62114290, 62114331, 62114341, 62114342, 62114390, 62114900).

Figure 1: Fashion Sportswear examples

Photo Source: Unsplash

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

Europe is one of the significant importers of Fashion Sportswear in the world. In 2020, the value of Fashion Sportswear imports to Europe amounted to €12.1 billion, up from €10.6 billion in 2015. This corresponded to roughly 649 million units of Fashion Sportswear clothing in 2020 (up from 589 million in 2015). Between 2015 and 2020, the value of the EU’s Fashion Sportswear imports grew by an average of 2.7% annually. It is expected that, in the years to come, the demand for Fashion 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.



The EU is also a large re-exporter of Fashion Sportswear apparel. In 2020, it exported €9.9 billion worth of Fashion Sportswear apparel (up from €8.0 billion in 2015). EU Fashion Sportswear exports have been growing at an average yearly rate of 4.3% between 2015 and 2020. The biggest EU exporters in 2020 were Italy (€2 billion), Germany (€1.9 billion), France (€1.1 billion), the Netherlands (€1.0 billion), Spain (€0.9 billion), and Belgium (€0.8 billion). Together, these six countries represent over 78% of the EU's Fashion Sportswear apparel exports. Italy and the Netherlands have seen the strongest export growth within this group, with an average yearly increase between 8.1% and 9.2%. In comparison, Germany, Spain, and Belgium have been growing at a much lower rate, with only 1.8 to 4.3% growth per year between 2015 and 2020. As for France, its average yearly export growth is the weakest, with a decline of 2.7% between 2015 and 2020.

Figure 3: European Union Fashion Sportswear exports in 2020 by Country Share

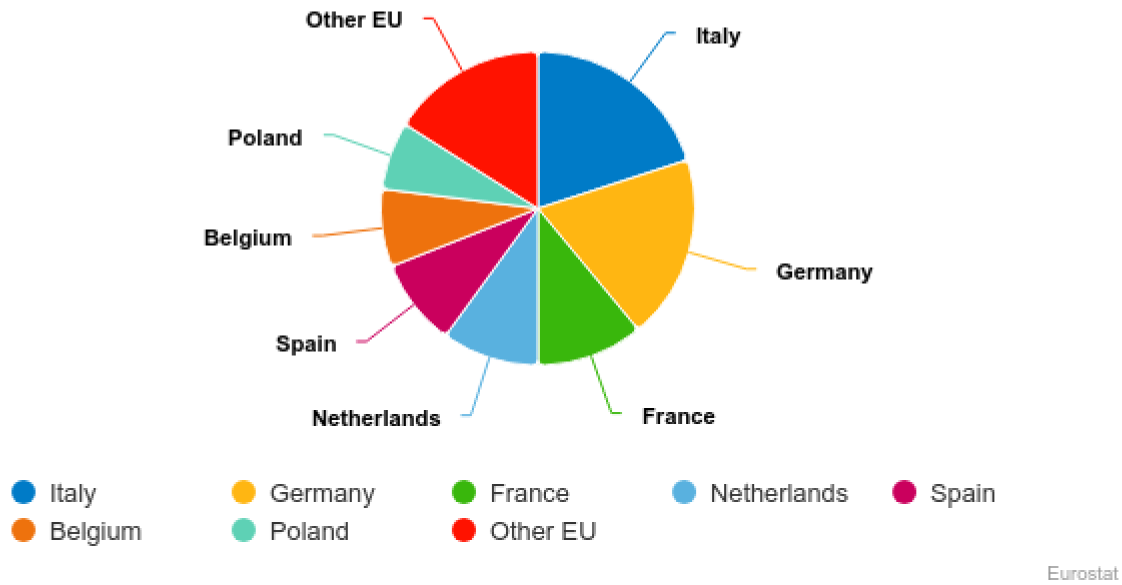
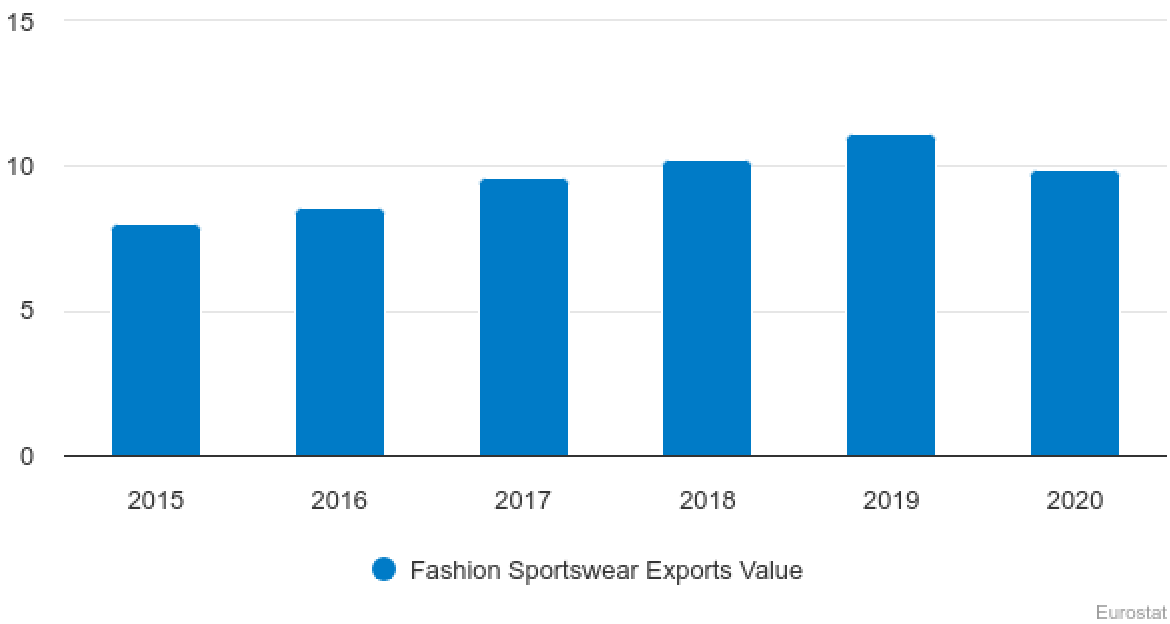


Figure 4: European Union Fashion Sportswear Exports

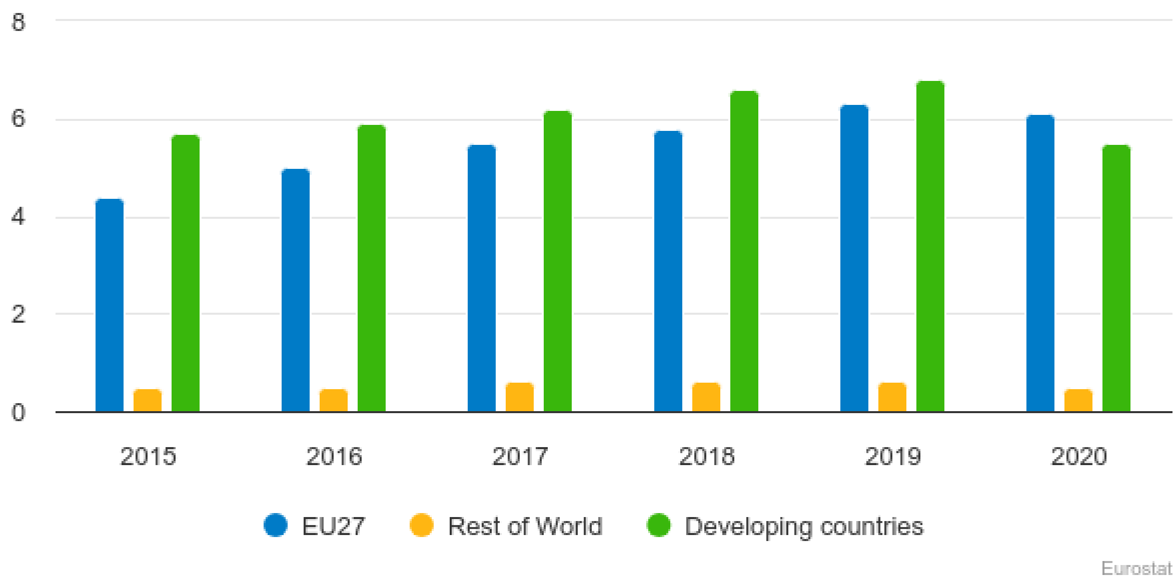
in € billion



In 2020, 49.8% of EU Fashion Sportswear imports originated in extra-EU countries and 50.1% originated in intra-EU countries. In 2020, suppliers from developing countries contributed 45% to all Fashion Sportswear imports into the EU in terms of value (down from 54% in 2015) and suppliers from the rest of the world accounted for 4% of the import value (down from 4.4% in 2015). The value of EU Fashion Sportswear imports originating from developing countries corresponded to €5.5 billion in 2020 and has decreased at an average yearly rate of 0.8% since 2015. This demonstrates that there is a lower demand for Fashion Sportswear from developing countries.

Figure 5: European Union Fashion Sportswear Imports by Origin

in € billion



Europe’s Extra-EU Fashion Sportswear imports are dominated by China, Bangladesh and Vietnam. Together, these three countries account for 31% of all Fashion Sportswear imports into the EU. China is the single largest Fashion Sportswear exporter to the EU with 21% of the EU imports value in 2020. It is followed by Bangladesh with 5.5% and Vietnam with 4.5%. Other Extra-EU Fashion Sportswear exporters have market shares between 1.0% and 4.3% of the overall Fashion Sportswear import value. Bangladesh (+1.7%), Myanmar (+3.5%), the United Kingdom (+0.4%), Cambodia (+0.4%), Turkey (+0.6%), and Morocco (+0.1%) increased their share of Fashion Sportswear imports between 2015 and 2020. Likewise, Bangladesh’s imports reached €666 million (in comparison to €400 million in 2015), while the average Extra-European Union countries experienced an average decrease of 0.5% annual average growth during the same period.

The Intra-EU Fashion Sportswear trade is dominated by Germany, Italy, and Poland. 24% of the total Intra-EU Fashion Sportswear imports originate in these three markets. They are followed by the Netherlands with 5%, Spain with 4.6%, and Belgium with 4.4%. All these countries have increased their shares within the last 5 years, except Denmark, which remained stable.

Table 1: Top 10 Extra-EU and Intra-EU Fashion Sportswear exporters to the European Union, 2020 EUR value; average yearly growth

Country	Value	5-yr growth
Top Extra-EU Fashion Sportswear Exporters		
China	€2.543 million	↓-7.0%
Bangladesh	€666 million	↑10.8%
Vietnam	€541 million	↑1.2%

Myanmar	€525 million	↑43.2%
United Kingdom	€356 million	↑5.4%
Cambodia	€245 million	↑7.2%
Turkey	€218 million	↑12.1%
Indonesia	€137 million	↓-4.5%
Morocco	€130 million	↑5.1%
India	€115 million	↓-5.8%
Top Intra-EU Fashion Sportswear Exporters		
Germany	€1.615 million	↑8.1%
Italy	€649 million	↑6.6%
Poland	€624 million	↑17.9%
Netherlands	€605 million	↑4.1%
Spain	€553 million	↑5.5%
Belgium	€537 million	↑7.1%
France	€375 million	↑4.6%
Denmark	€236 million	↑2.0%
Czechia	€178 million	↑9.1%
Romania	€147 million	↑5.2%

Source: Eurostat

Impact of COVID-19 on the European apparel market

The COVID-19 pandemic strongly influenced the sales and processes within all segments of the fashion industry in 2020. In most European countries, many local shops had to close during lockdowns. Some survived thanks to support from their governments, a mix of heavy discounts, and a shift to digital sales. Overall, Fashion Sportswear sales experienced a sales decline in 2020, although it was not as severe as in other apparel segments.

According to industry experts, the pandemic may change all market dynamics in the long run. Asian countries are expected to lose stakes due to local lockdowns and delivery problems, while companies in Africa or other regions could potentially win market share by being a reliable and present partner. Additionally, the pandemic created new trends and demands among consumers. E.g., some Chinese manufacturers have been observed providing buyers with antibacterial and antiviral fabrics.

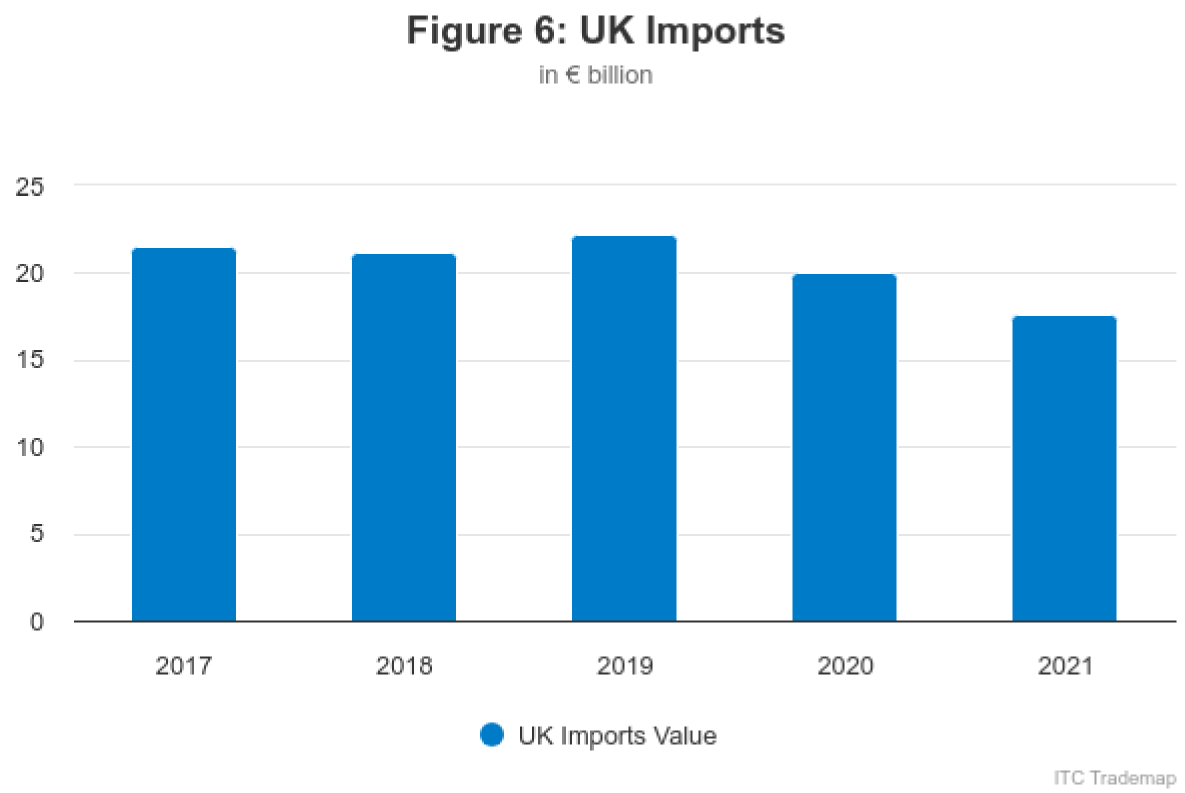
Further information about the impact of the coronavirus and how to respond have been collected and can be found in the CBI market information about the impact of the Coronavirus.

Brexit created great uncertainty

The United Kingdom left the European Union in 2020. As a result, new trade agreements for all product categories, including apparel, were needed to maintain business partnerships with countries located in the European Union and other partners worldwide.

The value of the UK's apparel imports is right behind Germany's, which would make it the second largest market in the European Union if it was still a member of the Union. Following its withdrawal from the European Union, the UK no longer shares its official trade figures with Eurostat. This makes an exact and official comparison of product segments and product quantities impossible, but the overall approximate import market values are still available from the ITC Trademap.

ITC Trademap figures show that the United Kingdom has deeply felt the consequences of both Brexit and the Covid-19 pandemic. The value of overall apparel imports decreased from €22.2 billion in 2019 to €17.6 billion in 2021, which is an average annual decrease of 11.1% over two years.



At this point, the long-term consequences of Brexit cannot yet be foreseen. However, in 2021, the country experienced dramatic shortages in supermarkets and in the workforce. This hampered the country's recovery from the pandemic and could turn out to be some of the long-term consequences of Brexit.

In the meantime, the European Union initiated an EU-UK Trade and Cooperation Agreement. This is intended to facilitate trade between the countries of the Union and the United Kingdom, but cannot fully replace the trade relationship that the UK enjoyed with the EU before Brexit. In 2021, the United Kingdom signed various trade agreements with non-EU countries.

3. Which European countries offer most opportunities for Fashion Sportswear

Western European markets are much larger and better developed than Central and Eastern European markets. The top Fashion Sportswear import markets in the EU are Germany, France, Italy, Spain, the Netherlands, and Poland. These top six countries together account for 72.8% of Fashion Sportswear imports in the EU and grew at an average rate of 2.1% per year between 2015 and 2020.

Table 2: Top 10 EU importers of Fashion Sportswear, 2020 EUR value; average yearly growth

Country	Value	5-yr growth
Germany	€2,800 million	↑0.7%
France	€1,544 million	↑1.5%
Italy	€1,334 million	↓-0.6%
Spain	€1,207 million	↑2.0%
The Netherlands	€1,083 million	↑4.2%
Poland	€828 million	↑12.9%
Belgium	€682 million	↑5.9%
Austria	€498 million	↑4.4%
Sweden	€375 million	↑4.1%
Denmark	€343 million	↓-0.1%

Source: Eurostat

Table 3: Top 10 European Union importers of Fashion Sportswear from developing countries, 2020 EUR value; average yearly growth

Country	Value of imports from developing countries	5-yr growth	Share of imports from developing countries
Germany	€1,485 million	↓-3.4%	27.0%
Spain	€813 million	↑2.7%	14.8%
Italy	€751 million	↓-4.0%	13.7%

France	€655 million	↑1.6%	11.9%
Netherlands	€495 million	↓-4.7%	9.0%
Belgium	€403 million	↑5.1%	7.3%
Denmark	€233 million	↓-1.6%	4.2%
Poland	€201 million	↑12.6%	3.7%
Sweden	€170 million	↓-0.4%	3.1%
Austria	€48 million	↑4.6%	0.9%

Source: Eurostat

Germany

Germany is the largest import market for Fashion Sportswear in Europe. In 2020, the value of its Fashion Sportswear imports amounted to €2.9 billion (up from €2.8 billion in 2015). This corresponded to approx. 157 million units of clothing. Between 2015 and 2020, the value of Germany's Fashion Sportswear imports grew at an average rate of 0.7% per year, while the import volume has grown at 1.4% per year. During the same time, the value of imports from developing countries decreased by an average of 3.4% per year. Currently, Fashion Sportswear originating from the developing countries constitutes over 53% of Germany's imports in this product segment. Germany is currently the top importer of Fashion Sportswear from developing countries.

The Women's or girls' anoraks category constitutes the bulk of Germany's fashion sportswear imports. The category accounts for 52% in terms of value and this share has remained relatively stable during the last 5 years. The total value of this category was €1.5 billion. The second-largest category is Men's or boys' anoraks with a total value of €1 billion. The Men's and women's anoraks import value grew by 1.3 - 2.0% between 2015 and 2020. The product category with the lowest growth is Tracksuits (average decrease of 2.2%), but its import volumes slightly increased to reach 9 billion units in 2020. The average unit price for tracksuits is also the highest (€44.59) compared to anoraks (€15.52 – €20.23).

Table 4: 2020 Imports of Fashion Sportswear to Germany by segment with 5-year growth, average import unit price and 5-year price evolution

GERMANY	2020 Value (€)	5-year growth	Average unit price	5-year price change
Tracksuits	€403 million	↓-2.2%	€ 44.59	-€ 6.03
Men's or boys' anoraks	€1,000 million	↑2.0%	€21.00	-€0.77
Women's or girls' anoraks	€1,531 million	↑1.3%	€15.20	€0.32

TOTAL:	€2,935 million	↑1.0%	€19.06	-€0.38

The main Sportswear brands in Germany include Adidas and Puma, Jako, Reusch, Schöffel, Ortlieb, and Vaude.

France

France is the second-largest market for Fashion Sportswear in Europe, with a value of €1.6 billion in 2020 (up from €1.5 billion in 2015). This corresponded to approx. 74 million units of clothing in 2020. Between 2015 and 2020, the value of France's Fashion Sportswear imports has grown at an average rate of 1.4% per year, while the import volume has grown by 4.5% per year. During the same time, the value of imports from developing countries has grown on average by 1.6% per year. Fashion Sportswear apparel originating from developing countries currently constitutes 42.5% of France's imports in this product segment.

The Women's or girls' anoraks category constitutes the bulk of France's fashion sportswear imports. The category accounts for 42% in value terms and the share remained relatively stable over the last 5 years. The total value of this category was €681 million and it grew by an average of 1.8% during the last 5 years. The second-largest category is Men's or boys' anoraks with a total value of €527 million. Men's and boys' anoraks grew by 2% in the 2015 – 2020 time period. Tracksuits account for 25% of Fashion Sportswear imports in France. The average unit price for a tracksuit is as high as €46.90, compared to €15.5-23.9 for anoraks.

Table 5: 2020 imports of Fashion Sportswear to France by segment, with 5-year growth, average import unit price and 5-year price evolution

FRANCE	2020 Value (€)	5-year growth	Average unit price	5-year price change
Tracksuits	€398 million	↑0.2%	€46.87	€11.06
Men's or boys' anoraks	€527 million	↑2.0%	€23.94	€3.12
Women's or girls' anoraks	€681 million	↑1.8%	€15.50	-€0.37
TOTAL:	€1,606 million	↑1.4%	€21.57	€1.16

The main Sportswear brands in France include Lacoste, Lafuma, Eider, Oxbow, Le Coq Sportif, Rossignol, Decathlon and Aigle.

Italy

Italy is the third-largest import market for Fashion Sportswear in the EU. In 2020, the value of its Fashion Sportswear imports amounted to €1.38 billion (down from €1.42 billion in 2015). This corresponded to approx. 54.9 million units of clothing in 2020. Between 2015 and 2020, the value of Italy's Fashion Sportswear imports decreased at an average rate of 0.6% per year, while the import volume decreased by 1.5% per year. During the same time period, the value of imports from developing countries decreased by an average of 4.0% per year. Fashion Sportswear imports originating from developing countries currently constitute 56.3% of Italy's imports.

Unlike in Germany and France, Italy's biggest Fashion Sportswear category is men's or boys' anoraks, which account for 48% of the import value, up from 44% in 2015. Women's or girls' anoraks account for 38% and tracksuits for 14%. The Men's or boys' anoraks category saw the strongest growth (5%) in the 2015 – 2020 time period. The average unit price of Fashion Sportswear imports is €25.14, which is €1.09 higher than in 2015.

Table 6: 2020 Imports of Fashion Sportswear to Italy by segment with 5-year growth, average import unit price and 5-year price evolution

ITALY	2020 Value (€)	5-year growth	Average unit price	5-year price change
Tracksuits	€189 million	↓-2.4%	€27.29	€3.93
Men's or boys' anoraks	€667 million	↑1.4%	€26.31	€1.18
Women's or girls' anoraks	€525 million	↓-2.2%	€23.17	-€0.07
TOTAL:	€1,380 million	↓-0.6%	€25.14	€1.09

The main Sportswear brands in Italy include Fila, Kappa, Lotto, Diadora, Errea, Legea and Macron.

Spain

Spain is the fourth-largest import market for Fashion Sportswear in the EU. In 2020, it had Fashion Sportswear imports valued at €1.3 billion (up from €1.2 billion in 2015). This corresponded to approx. 84 million units of clothing in 2020. Between 2015 and 2020, the value of Spain's Fashion Sportswear imports grew at an average rate of 2.1% per year, while the import volume grew at 3 % per year. During the same time period, the value of imports from developing countries grew by an average 2.7% per year, with Fashion Sportswear apparel from developing countries constituting over 67.4% of Spain's imports in this product segment.

The Women's or girls' anoraks category constitutes the bulk of Spain's fashion sportswear imports. The category accounts for 48% in value terms, up from 40% in 2015. The total value of this category was €624 million in 2020 and it grew by 6% on average during the last 5 years. The second-largest category is Men's or boys' anoraks with a total value of €394 million and a 0.5% average growth rate in the 2015 – 2020 time period. Both categories have outperformed the growth rate of the total Fashion Sportswear imports growth. The average unit price of Fashion Sportswear imports was €15.52 in 2020, which is €0.73 lower than in 2015.

Table 7: 2020 imports of Fashion Sportswear to Spain by segment, with 5-year growth, average import unit price and 5-year price evolution

SPAIN	2020 Value (€)	5-year growth	Average unit price	5-year price change
Tracksuits	€286 million	↓-2.6%	€38.56	€7.26

Men’s or boys’ anoraks	€394 million	↑0.5%	€13.99	€0.36
Women’s or girls’ anoraks	€624 million	↑6.0%	€12.87	-€0.90
TOTAL:	€1,304 million	↑2.1%	€15.52	-€0.73

The main Sportswear brands in Spain include Joma, Kelme, and Luanvi.

The Netherlands

The Netherlands is the fifth-largest import market for Fashion Sportswear in the EU, with a value of €1.1 billion in 2020 (up from €924 million in 2015). This corresponded to approximately 44 million units of clothing in 2020. Between 2015 and 2020, the value of the Netherlands’ Fashion Sportswear imports grew at an average rate of 4.3% per year, while the import volume decreased by 3.1% per year. During the same time, the value of imports from developing countries decreased by an average of 4.7% per year, with Fashion Sportswear apparel from developing countries constituting over 45.7% of the Netherland’s imports in this product segment.

The Men’s or boys’ anoraks category accounts for 38% (the same as in 2015), while the women’s or girls’ anoraks category accounts for 38% (down from 44% in 2015). Tracksuits (9.9% growth per year between 2015 and 2020) is the fastest-growing product category within Fashion Sportswear imports in the Netherlands, followed by men’s or boys’ anoraks (4.5%). This is higher than the average annual growth of Fashion Sportswear imports (4.3%). The average unit price of Fashion Sportswear imports is €25.70, which is €7.89 higher than in 2015. This is the highest average unit price for Fashion Sportswear in the top six.

Table 8: 2020 imports of Fashion Sportswear to the Netherlands by segment with 5-year growth, average import unit price and 5-year price evolution

NETHERLANDS	2020 Value (€)	5-year growth	Average unit price	5-year price change
Tracksuits	€268 million	↑9.9%	€100.26	€28.65
Men’s or boys’ anoraks	€437 million	↑4.5%	€22.95	€5.49
Women’s or girls’ anoraks	€435 million	↑1.4%	€19.22	€5.44
TOTAL:	€1,140 million	↑4.3%	€25.70	€7.89

The main Sportswear brands in the Netherlands include Aktiesport and Hi-Tec.

Poland

Poland is the sixth-largest import market for Fashion Sportswear, with a 2020 value of €871 million (up from €468 million in 2015). This corresponded to approximately 49 million units of clothing in 2020. Between 2015 and 2020, the value of Poland's Fashion Sportswear imports grew at an average rate of 13.2% per year, while the import volume increased by 11.1% per year. During the same time period, the value of imports from developing countries grew by an average of 12.6% per year, with Fashion Sportswear apparel from developing countries constituting over 24.3% of Poland's imports in this product segment.

The Men's or boys' anoraks category constitutes the bulk of Poland's Fashion Sportswear imports, accounting for 31%. The Women's or girls' anoraks category accounted for 55% of Poland's Fashion Sportswear imports, up from 48% in 2015. Tracksuit imports grew by 3.4% in the 2015 – 2020 time period, making it Poland's slowest growing product category. The average unit price of Fashion Sportswear imports was €17.86, which is €1.65 higher than in 2015. Tracksuits' unit price was the highest (€102.38), followed by women's and men's anoraks (€16.22 and €15.17 respectively).

Table 9: 2020 imports of Fashion Sportwear to Poland by segment, with 5-year growth, average import unit price and 5-year price evolution.

POLAND	2020 Value (€)	5-year growth	Average unit price	5-year price change
Tracksuits	€118 million	↑3.4%	€102.38	€57.14
Men's or boys' anoraks	€273 million	↑13.5%	€15.17	€1.85
Women's or girls' anoraks	€480 million	↑16.5%	€16.22	€2.07
TOTAL:	€871 million	↑13.2%	€17.86	€1.66

The main Fashion Sportswear brands in Poland include 4F, Nago, Carpatree, Joy Fit Crew, This is Committment.

Tips:

- Focus your export efforts on the top six markets: Germany, France, Italy, Spain, the Netherlands, and Poland because they are the biggest apparel consumers in Europe. In addition, Germany, France, Italy, Spain, and Belgium are 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 high average import prices and a positive price evolution between 2015 and 2020.
- Visit the websites of each country's main importers to find out the Fashion Sportswear requirements and aesthetics for different sectors.
- Consider exporting to Poland, as it is currently Europe's fastest-growing importer of apparel and apparel from developing countries, including the Fashion Sportswear segment.
- Keep an eye on the developments due to 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 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 these brands to understand what the assortment on the European market looks like and what the European Fashion Sportswear is.

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

The European Fashion 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 and Opportunities in the Apparel market. Aside from these general trends, the Fashion 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, Sweaty Betty.

Fashion Trends

The 2020 sportswear fashion trends included a traditional aesthetic consisting of technical fabrications, neon hues, colour blocking, and bold branding. For men’s Fashion Sportswear, a softer and more subtle iteration of the trend emerged, with softer colour palettes of grey and beige hues with an injection of pastel. In the women’s Fashion Sportswear category, high-shine and coated fabrics, metallics (as seen at Beyond Yoga) as well as solid monochrome colours that can be easily mixed and paired such as black, burgundy, dark green, and grey, have seen an increase in demand. Leggings with pockets (as from Lascana) and “zip leggings” were trending pieces. More recently, a nineties influence was identified, particularly appealing to Millennials. It includes, for example, lightweight crop tops and leggings with twists or colour-blocked windbreaker jackets. Brands are also putting more effort into offering more clothing sizes.

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 ptimize 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.

Another innovation, influenced by the pandemic, is more functional fabrics that include such things as antiviral and antibacterial capabilities (e.g. HeiQ Viroblock, an antiviral and antibacterial textile chemical compound that is added to the fabric during the final stage of the textile manufacturing process). PPE apparel, smart textiles, wearables, and protective clothing could also find their way into sportswear.

Marketing and Sales

With the pandemic-induced shutdown of brick and mortar stores in the retail sector, online sales were expected to experience a real boom. However, the general online fashion retail sector suffered from a shift in people’s priorities during lockdowns and confinement. Fashion and outward appearance became less important.

The sub-sector of sportswear and athleisure clothes was the only exception, benefitting from a shift to remote work and at-home exercise. The COVID-19 pandemic has increased demand for comfortable athletic clothing. Brands reported high increases in online sales (e.g. Lululemon’s direct-to-consumer business, which includes its online platform, grew by 155% in the second quarter and Nike aims for its online sales to account for 50% of its overall business, up from the current 30%). The pandemic is providing a turbo boost towards online retail, and this trend is expected to last after the pandemic because the lockdown period convinced numerous new clients to switch to online purchases. With people spending more time at home and online, consumers are more accessible and fitness influencers are in a unique position to partner with brands to help create content for social media channels.

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 plastic, regenerated nylon, organic cotton or recycled polyester and consumers are actively searching for brands using materials like Econyl, Repreve, Tencel or organic cotton (as seen in collections from Girlfriend Collective, Adidas x Parley, and Vyayama). Other sustainability efforts include printing with eco-prints and trying to keep short and transparent supply chains to reduce carbon emissions.

In 2020, the circular economy - that is the recycling of garments back into their constituent elements, eliminating the need for virgin material - gained momentum in the sportswear category. In September 2020, Sustainable fashion brand Presca announced their collaboration with Poseidon Plastics and Teeside University on a range of "fully circular" sportswear. In parallel, at the same time, Swiss-based high-performance running brand “On” announced the launch of its world-first, subscription-based service to bring fully recyclable sportswear to On customers worldwide. The subscription service, named “Cyclon”, will allow subscribers to receive and wear the latest in running sportswear and then return end-of-life products back to On, in exchange for the latest version.

The sourcing of fabric is expected to change with increased digitalisation, (e.g. B2B platforms like Texdome connect brands and manufacturers in a digital way).

Tips:

- Increase your focus on Fashion Sportswear. Europe has a strong demand for this product category and is increasingly importing it from developing countries. Inform yourself on the design trends in Fashion Sportswear by observing the most popular brands in the market.
- Adjust your Fashion Sportswear trends. Visit European Fashion Sportswear brands’ websites to understand current trends. Speak to stylists and do research to understand the upcoming styles for Fashion Sportswear in 2022.
- 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 experimenting with the antiviral and antibacterial capabilities of clothing.
- 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. Pay attention to the sourcing of fabric and consider using platforms such as Texdome.
- Consider offering Fashion Sportswear B2C alongside B2B activities. You can sell through your own webshop, existing online platforms such as ebay and Amazon, or through social media.

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