

The European market potential for adaptive apparel

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Adaptive apparel is an increasingly interesting product segment for exporters from developing countries. The European population continues to age and in most European countries at least 15% of the population report some sort of disability. People with disabilities are also increasingly interested in seeking out fashionable choices for their adaptive clothing. The European adaptive apparel market was worth an estimated €70 billion in 2018, and is growing due to the increasing share of elderly and disabled populations in Europe.

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1. Product description

Adaptive clothing is defined as clothing, garments and footwear specifically designed for seniors, people with disabilities, people with limited mobility (temporary or permanent), the infirm, post-surgery patients and patients undergoing various medical treatments, children and adults with special needs, people who may have difficulty dressing themselves independently due to different conditions such as multiple sclerosis, Parkinson's disease, arthritis, quadriplegia and paraplegia, people who are suffering from the repercussions of a stroke, and individuals who need sensory-processing accommodations. Adaptive clothing also makes dressing and undressing patients easier for caregivers, nurses and hospice staff.

Adaptive clothing design varies based on the relevant disability. For some conditions, it is essential that the materials used are not abrasive to the skin. For people suffering from mobility issues and physical limitations causing them to have trouble dressing and undressing, adaptive clothing targets easier clothes changing. It could include design elements such as adjustable waists, easy open necklines, adjustable hems and features that optimise closures by replacing buttons, zippers or laces with Velcro, magnets or one-handed zippers.

For people with sensory issues, adaptive clothing may include features that provide nonrestrictive comfort to the wearer, e.g. it could include pieces made with specific materials and textures like soft cotton knits that are soothing to the wearer and that do not have irritating tags or seams, or clothes that are weighted.

For post-surgery patients or individuals who require specific medical equipment, adaptive clothing may use design elements such as wheelchair friendly materials that don't get stuck in the wheels, pockets that remain accessible even while sitting, looser fits around hips and waist, and/or a longer neck to waist ratio. It could also include openings or slits that provide easy access to different body parts and allows for accessing wounds, tube incisions, feeds and other drains like catheters without removing the entire garment. Similarly, adaptive clothing may include hidden pouches for catheter bags or support belts for ileostomy bags.

Figure 1: Adaptive Apparel Examples

2. What makes Europe an interesting market for Adaptive Apparel?

There are no Eurostat statistics on production, imports or exports of adaptive apparel in Europe, but the market can be estimated based on the share of the disabled population and the overall apparel import statistics. The main market for medical and adaptive clothing includes individuals living with disabilities and the elderly. It is estimated that nearly 16% of the world's population, or about 785 million people, have a disability. In the EU, about 26.3% of women and 21.8% of men aged 16 and over declare a disability. Severe disability is declared by about 7.5% and moderate disability by 17.2% of people aged 16 and over. This amounts to 38.5 million and 88.3 million persons respectively. According to the United Nations, disabled people are the fastest growing minority group in the world. Currently, 19.7% of EU's population or nearly 101 million people are aged 65 or older. More than 4 out of 10 persons in the EU aged 65 and over reported limitations in household activities in 2014.

Based on estimates, the global adaptive clothing market was valued at €255.5 billion in 2017 and is expected to grow to nearly €366 billion by 2026. The European adaptive apparel market was worth an estimated €70 billion in 2018. The market is attractive due to the large share of the disabled and the elderly population, high purchasing power and average spending per capita on apparel. People with disabilities usually spend more money on apparel than people without disabilities because they often need to have clothing altered. They are thus prepared to pay higher prices for high quality apparel that suits their needs.

Although there is still much to be done with regards to awareness and fashion inclusion of the elderly and people with disabilities, the adaptive apparel market is continuing to expand at a rapid rate. It will be driven by the aging population in Europe and the increasing awareness among consumers and producers of apparel.

Key players operating in the global adaptive clothing market include, Silvert's Adaptive Clothing & Footwear, Izzy Camilleri, NBZ Apparel International, Able2Wear, Adaptions By Adrian, Professional fit Clothing, Adaptive Clothing Showroom, Creation Comfort, Buck & Buck, PVH Corp., and others.

3. Which European countries offer the most opportunities for Adaptive Apparel?

Italy, Germany and Portugal have the largest elderly population in the EU (between 21.5% and 23% of the entire population) and the Netherlands and Portugal have the highest shares of population with a reported disability, 25.7% and 25% respectively. Germany, Italy and France are the three countries with the highest absolute number of people aged 65 and over and the highest absolute numbers of people with disabilities.

Table 1: Top 10 EU countries with the highest number of people aged 65+ in 2017

Country	Population over 65 years	Share of population over 65 years	Population over 16+ with a disability	Share of population with a reported disability
Germany	17.821.000	21.5%	12.516.000	15.1%

Italy	13.890.000	23.0%	10.991.000	18.2%
France	13.272.000	19.7%	10.914.000	16.2%
United Kingdom	12.217.000	18.5%	9.994.000	14.3%
Spain	9.066.000	19.4%	7.571.000	16.2%
Poland	6.457.000	16.8%	6.303.000	16.4%
Romania	3.495.000	17.9%	4.022.000	20.6%
Netherlands	3.253.000	18.8%	4.448.000	25.7%
Portugal	2.213.000	21.5%	2.573.000	25.0%
Greece	2.197.000	20.4%	1.465.000	13.6%
EU28	101.160.000	19.7%	88.322.000	17.2%

Source: Eurostat

Germany

Germany is the most populous country in Europe and has the highest absolute number of people aged 65 and over as well as the highest number of people declaring disability. At the same time, Germany is the number one importer of apparel in Europe, with a yearly import value of €33.9 billion. The purchasing power of the disabled in Germany is estimated at €233.9 billion per year. The market potential for adaptive clothing imports to Germany was at an estimated €5.1 billion in 2018.

In Germany, there are very few manufacturers of adaptive apparel - there were only 17 manufacturers in 2013. Some principal companies include [Rollitex Berlin](#), [Renato](#) and [Rollimoden](#) (providers of wheelchair fashion), [Schürmann](#) and [Aretex](#).

The Netherlands

The Netherlands has the ninth highest absolute number of people aged 65 and over as well as of people declaring disability. At the same time, the Netherlands is the fifth largest importer of apparel in Europe, with a yearly import value of €14.7 billion. The purchasing power of the disabled in the Netherlands is estimated at €87.3 billion per year. The market potential for adaptive clothing imports to the Netherlands was at an estimated €3.8 billion in 2018.

The main providers of adaptive apparel in the Netherlands include [ZorgVrij](#), [So Yes](#), [Wi Care](#) and [Carrycare](#).

France

Italy is the second most populous country in Europe and has the third highest absolute number of people aged 65 and over as well as the third highest number of people declaring disability. At the same time, France is the second largest importer of apparel in Europe, with a yearly import value of €21.7 billion. The purchasing power of the disabled in France is estimated at €199.2 billion per year. The market potential for adaptive clothing

imports to France was at an estimated €3.5 billion in 2018.

The main providers of adaptive apparel in France include [Constant et Zoe](#), [Selfia](#), [Le loups bleus](#) (for children's fashion) and A&K Classics (both now cooperating with Kiabi).

The United Kingdom

The UK is the third most populous country in Europe and has the fourth highest absolute number of people aged 65 and over as well as of people declaring disability. At the same time, the UK is the third largest importer of apparel in Europe, with a yearly import value of €19.6 billion. The purchasing power of the disabled in the UK is estimated at €175 billion per year. The market potential for adaptive clothing imports to the was at an estimated €2.8 billion in 2018.

The main providers of adaptive apparel in the UK include [The Able Label](#), [Able2Wear](#), [Rackety's](#), [Adaptability Clothing](#), [Adaptawear](#), [Silverts](#).

Marks&Spencers is the first high street retailer in the UK to offer a kids wear range for children with disabilities. Its "Adapted for Easy Dressing" line includes T-shirts with soft velcro fastenings at the back of the neck, trousers and shorts with poppers instead of zippers, dresses with discreet pockets for a feeding tube, and others. The collection took two years to create and was based on a survey with 300 parents. Asos has recently introduced an adaptive apparel line as well.

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 most populous country in Europe and has the fifth highest absolute number of people aged 65 and over as well as the fifth highest absolute number of people declaring disability. At the same time, Spain is the fourth largest importer of apparel in Europe, with a yearly import value of €16.6 billion. The purchasing power of the disabled in Spain is estimated at €95.4 billion per year. The market potential for adaptive clothing imports to Italy was at an estimated €2.7 billion in 2018.

The main providers of adaptive apparel in Spain include [Marlo](#), [Maxvida](#), [GMK](#), [Personas Wip](#), [Hop Toys](#).

Italy

Italy is the fourth most populous country in Europe and has the second highest absolute number of people aged 65 and over as well as the second highest number of people declaring disability. At the same time, Italy is the sixth largest importer of apparel in Europe, with a yearly import value of €14.5 billion. The purchasing power of the disabled in Italy is estimated at €197.8 billion per year. The market potential for adaptive clothing imports to Italy was at an estimated €2.6 billion in 2018.

The main providers of adaptive apparel in Italy include [Libero Style](#) and [Lydda Wear](#).

Tips:

- Focus your export efforts on the top six markets - Germany, the Netherlands, France, the United Kingdom, Spain and Italy - because they constitute the biggest apparel markets in Europe, with the largest volume of disabled and elderly customers and with a high purchasing power.
- 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 Adaptive Apparel market?

Mainstream Retailers are releasing Adaptive Apparel lines

A 2017 survey of people with mobility disabilities and impairments indicated that the clothing needs of people living with disabilities and impairments are not being met, and that the lack of appropriate clothing prevented these individuals from fully engaging in social activities and relationships, employment or everyday life events. Currently, there are very few adaptive apparel retailers in Europe and around the world, but this is starting to change. Asos, Zappos, Lands' End and Target have begun offering adaptive apparel options. In 2018, Target released a clothing line targeting Adult Women with special needs. The Universal Thread collection includes jeans and tops in adult sizes. Tommy Hilfiger launched Tommy Adaptive in 2018, a line of clothing for children and adults with various needs that ranges from jeans that fit over prosthetic legs to shirts with easy-open necklines. E-retail shoe giant Zappos has started selling adaptive shoes and clothing. Nike makes the FlyEase, an easy-on zippered athletic sneaker which is available in men's, women's and children's models.

Adaptive Apparel Segmentation

The brands are increasingly targeting different segments of adaptive apparel, e.g. children, adults, activewear, workwear, although currently there is still not enough offer and innovation in each of these. In the US, Target has released a [Cat & Jack adaptive clothing line](#) for children with special needs such as disabilities and sensory-processing sensitivities, e.g. children with autism who have limited fine motor skills or are not potty trained, meaning they need clothes that cover bulky diapers and allow for easy access. The children's adaptive apparel segment is often the one with the easiest entry for most brands but there are also opportunities in underserved segments like workwear that caters to physically disabled customers. In the UK, 3.9 million people who self-reported as being disabled were at work this year, an increase of 150,000 from 2018. There is also a market for high quality and innovative adaptive apparel as well as adaptive accessories.

Making Adaptive Apparel Stylish

The mass end of the adaptive apparel market is now well covered but there is still space for premium and luxury brands to build off the existing technical knowledge. [Adaptawear](#) and [Able2Wear](#) represent two of the very few large scale and affordably priced adaptive clothing brands based in the UK that are designed specifically for disabled customers. These two retailers fail to consider fashionable trends and concentrate on older people rather than independent young and middle-aged adults or fashion-minded customers. There are also several smaller boutique and online retailers that offer fashionable adaptive apparel (e.g. [Lucy Jones](#), who has a "Seated Design" collection created for wheelchair users and Emma McClelland's [Kintsugi Clothing](#)). While functionality is essential in designing adaptive apparel, there is a growing trend for making it stylish and fashionable as well. It is about offering clothing options that allow people to express their personality and sense of style. There is demand for styles that are fashion-forward as well as functional, but higher-end labels still lack appropriate points-of-sale. There is also a trend in medical wear for more fashionable disabled clothing and garments, e.g. in compression stockings, undergarments, swimwear for ostomates and other adaptive apparel.

Designing adaptive apparel is a consultative process

Adaptive clothing may look dissimilar from mainstream apparel, but most labels already have some of the skills needed to launch such a line. This market is more or less available to any brand willing to invest in the research and development it takes to create adaptive fashion. The costs of creating lines for disabled customers are comparable to launching an extended sizing collection, but brands need to involve medical professionals, engineers, occupational therapists and the customers themselves in the research and development process. Although in this apparel segment, the customer should be the starting point, there is still little information about the adaptive consumer at a macro level. Companies must do a better job understanding the needs and

preferences, lives and habits of this customer group.

Adaptive apparel offering has a halo effect

Offering products for people with disabilities may have a halo effect on the sales of a producer or a brand's mainstream products because consumers become increasingly conscious of a brand's ethical reputation and like to buy apparel from companies that are seen as inclusive. Retailers and designers entering the adaptive apparel market will not only generate a positive social and economic impact but will also gain the first-mover advantage by becoming the 'go to' provider of certain adaptive clothing styles.

Tips:

- Talk to adaptive apparel buyers in Europe to understand their needs and inquire about subcontracting opportunities. Get in touch with different disability associations in each of the major markets. Consider developing your own D2C adaptive apparel brand as there is a definite gap in this market.
- Talk to adaptive apparel customers to understand their needs but also go to related conferences and talk to nurse practitioners. Set up an advisory committee comprised of people with disabilities, experts in the disability community and stylists with the experience in the area.
- When designing garments for wheelchair users, be careful about where zippers and seams are situated to avoid skin sores. Jeans should come without back pockets to avoid chafing. Shoes without laces, shirts with magnetic closures and clothing without tags or seams are some of the well-received product design choices for people with autism and sensory processing difficulties.
- Use fabrics of the highest quality, which are able to withstand rigorous cleaning and usage.
- The fashionable adaptive apparel market is untapped in terms of its true commercial potential. Consider working on innovating the designs and patterns to reflect the demand from the fashion-forward customer group.

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

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