The European market potential for workwear

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The Industrial and Occupational Workwear market is worth approximately €2.7 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 4.8% each year.

The biggest trends in this market include the development of more versatile and wearable pieces, as well as sustainable products and embedded new technologies. In 2020, the workwear segment was driven by the constantly evolving local legislation for employers, which are forced to cover the safety and health of their employees, the ongoing increasing amount of construction sites in Europe, and the sudden, intense need for protective workwear that protects employees from an infection with SARS Covid-19.

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1. Product description

Workwear includes Men's and Woman's industrial and occupational workwear, for example 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).

Workwear in Europe gets mainly sold by specialist distributors and super stockists, of which many sell their products online. Public institutions in Europe are forced to look for workwear stocks through public tenders to comply with the European purchase regulations.

Figure 1: Workwear examples

Photo Source: Unsplash

2. What makes Europe an interesting market for Workwear?

Europe is one of the more significant importers of workwear in the world. In 2020, the value of workwear imports to Europe accounted for €2.7 billion, up from €2.1 billion in 2015. This corresponded to roughly 139 million units of workwear clothing in 2020 (up from 113 million in 2015). During the last five years, the value of the European Union's workwear imports has grown on average by 4.8% annually. 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.

The European Union is also a large re-exporter of workwear. In 2020, it exported €1.6 billion worth of workwear apparel (up from €1.3 billion in 2015). EU workwear exports grew at an average yearly rate of 4.4% between 2015 and 2020. The biggest EU exporters in 2020 were Poland (€228 million), Germany (€214 million), Belgium (€173 million), Denmark (€113 million), the Netherlands (€106 million) and Sweden (€103 million). Together, these six countries represent over 71.5% of the EU's workwear apparel exports. Poland, the Netherlands, and Germany have seen the strongest export growth within this group, with an average yearly increase between 8.7% and 14.6%. In comparison, Belgium and France have experienced recent decreases of 0.6% and 1.3% annually.

Currently, 57.2% of European workwear imports originate in extra-EU countries and 42.8% originates in Intra-European Union countries. In 2020, suppliers from developing countries contributed 33.3% to all workwear imports into the European Union in terms of value (up from 32.5% in 2015) and suppliers from the rest of the world accounted for 23.9% of the import value (up from 21.7% in 2015). The value of European Union workwear imports originating from developing countries corresponded to €895 million in 2020 and has grown at an average yearly rate of 5.3% since 2015. This demonstrates that there is a strong demand for workwear from developing countries.

Europe's extra-EU workwear imports are dominated by China, Tunisia, and Bangladesh. Together, these three countries account for 30.6% of all workwear imports into the European Union. China is the single largest workwear exporter to the EU with 12.8% of the EU imports value in 2020. It is followed by Tunisia with 8.9% and Bangladesh with 5.0%. Other extra-EU Workwear exporters have market shares of less than 4% of the overall workwear import value. Turkey (+35.1%), Bangladesh (+20.4%), Armenia (16.5%), and the United Kingdom (12.7%) have grown significantly in the last five years. Likewise, Turkey's imports reached €55 million (in comparison to €12 million in 2015), while the average Extra-European Union countries experienced an average annual growth of 5.9% during the same period.

The Intra-European Union workwear trade is dominated by Germany, Belgium, and Poland. 43.5% of the total Intra-EU workwear imports originates in these three markets. They are followed by Sweden with 7.2%, Denmark with 6.7% and the Netherlands with 6.3%. All these countries have increased their shares within the last 5 years.

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

Country	Value	5-yr growth
Top Extra-EU Workwear Exporters		
China	€342 million	+4.6%
Tunisia	€214 million	+2.5%
Bangladesh	€133 million	20.4%
Vietnam	€107 million	+2.0%
Morocco	€75 million	-0.7%
Laos	€71 million	+8.5%
United Kingdom	€62 million	+12.7%
Pakistan	€59 million	+7.4%
Turkey	€55 million	+35.1%
Sri Lanka	€41 million	+7.7%
Top Intra-EU Workwear Exporters		
Germany	€239 million	+10.1%
Belgium	€143 million	+0.6%
Poland	€117 million	+2.9%
Sweden	€82 million	+6.2%
Denmark	€77 million	+3.7%
Netherlands	€73 million	+8.0%
France	€70 million	-1.5%
North Macedonia	€67 million	+4.5%
Italy	€48 million	+11.2%
Portugal	€46 million	-2.1%

Source: Eurostat

Impact of COVID-19 on the European apparel market

The COVID-19 pandemic is strongly influencing the sales and processes within all segments of the fashion industry in 2020. In most European countries, local shops had to close during lockdowns, depending heavily on support payments from their governments, the offer of heavy discounts and a seamless shift to digital channels. On one side, workwear sales have experienced a slight decline, due to local short-time work regulations and the temporary closure of companies as part of lockdowns. On the other side, protective workwear has experienced a large increase due to the need of Covid-19 protection for all professionals (within and out of the healthcare industry).

Also, the e-commerce market has helped to compensate losses made through physical sales. Likewise, Carhartt's e-commerce businesses even grew to record heights in 2020. Overall, the workwear apparel segment has not been as dramatically influenced by the pandemic as other segments of the apparel industry as a whole.

According to industry experts, the pandemic can change all market dynamics on long-lasting terms. Asian countries are expected to lose stakes due to local lockdowns and experienced issues in delivery, while African companies or companies of other regions could potentially win market share by being a reliable and present partner. Additionally, the pandemic has created new trends and demands from the consumers. Likewise, some Chinese manufacturers have been observed providing buyers with bio-antibacterial fabrics.

Further tips and information on the impact of the coronavirus have been collected and can be found in the CBI market information on the impact of the Coronavirus.

3. Which European countries offer most opportunities for Workwear?

Western European markets are much larger and better developed than Central and Eastern European markets in terms of supply chain organisation and quality control. The top workwear import markets in the EU are Germany, France, the Netherlands, Belgium, Italy, and Poland. These top six countries together account for 61.8% of workwear imports in the EU and have grown at an average rate of 6.6% per year in the last five years.

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

Country	Value	5-yr growth
Germany	€628 million	+4.3%
France	€407 million	+1.6%
Netherlands	€243 million	+12.2%
Belgium	€198 million	+2.0%
Italy	€184 million	+6.4%
Poland	€148 million	+12.9%
Austria	€133 million	+4.9%

Sweden	€127 million	+0.0%
Spain	€103 million	-0.6%
Denmark	€84 million	-0.9%

Source: Eurostat

Table 3: Top 10 European Union importers of workwear 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	€234 million	+9.6%	37.2%
France	€190 million	+4.2%	46.7%
Belgium	€88 million	-2.1%	44.7%
Italy	€68 million	+6.8%	31.1%
Sweden	€64 million	+2.2%	50.3%
Spain	€53 million	+0.5%	51.4%
Netherlands	€44 million	+4.6%	18.1%
Poland	€41 million	+9.0%	27.9%
Denmark	€41 million	+5.3%	48.1%
Portugal	€18 million	+15.5%	35.5%

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 2020, the value of its workwear imports amounted to €628 million (up from €508 million in 2015). This corresponded to approximately 26 million units of clothing. In the last five years, the value of Germany's workwear imports has grown at an average rate of 4.3% per year, while the import volume has grown at 0.3% per year. During the same period, the value of imports from developing countries grew an average of 9.6% per year, with workwear from developing countries constituting 37.2% of Germany's imports in this product segment.

Men's workwear constitutes 82.7% of this segment (down from 83.3% in 2015) and while it is growing quickly, its unit prices are significantly lower than those of the Women's Workwear segment (€22.81/unit for men's workwear vs. €35.45/unit for women's workwear). At the same time, both segments have experienced an increase in price/unit of more than €4.00.

Table 4: 2020 Imports of workwear 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
Men's Workwear	€519 million	+4.2%	€22.81	+€4.09
Women's Workwear	€109 million	+5.2%	€35.45	+€4.73
TOTAL:	€628 million	+4.3%	€23.85	+€4.24

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 2020, the value of its workwear imports amounted to €407 million (up from €376 million in 2015). This corresponded to approx. 18.7 million units of clothing. In the last five years, the value of France's workwear imports has grown at an average rate of 1.6% per year, while the import volume has grown at 2.2% per year. During the same period, the value of imports from developing countries grew an average of 4.2% per year with workwear from developing countries constituting approximately 46% of France's imports in this product segment. France is currently the second largest importer of workwear from developing countries behind Germany. In 2018, the country was the largest importer within the European Union.

Men's Workwear constitutes 81.7% of workwear imports in France (down from 84.8% in 2015) and is growing again at +0.8%, which is lower than the Women's Workwear segment with a growth of 5.5%-. Men's Workwear unit prices are lower than Women's Workwear prices (€21.18/unit for men's workwear against €24.69/unit for women's workwear). While Men's Workwear is undergoing a negative price development, Women's Workwear value has increased by 18.4% between 2015 to 2020.

Table 5: 2020 Imports of workwear 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
Men's Workwear	€333 million	+0.8%	€21.18	-€1.09

Women's Workwear	€75 million	+5.5%	€24.69	+€1.52
TOTAL:	€407 million	+1.6%	€21.75	-€0.66

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

The Netherlands

The Netherlands is the third largest import market for workwear in Europe. In 2020, the value of its workwear imports amounted to €243 million (up from €136 million in 2015). This corresponded to approximately 11 million units of clothing. In the last five years, the value of the Netherlands' workwear imports has grown at an average rate of 12.2% per year, while the import volume has grown at 9.8% per year. During the same period, the value of imports from developing countries grew at an average of 4.6% per year with workwear from developing countries constituting 18% of the Netherlands' imports in this product segment.

Men's Workwear currently constitutes 85% of the workwear imports in the Netherlands (down from 89% in 2015). Women's Workwear has been outpacing Men's Workwear in terms of growth with a yearly average increase of 19.2%. Men's Workwear import unit prices are lower than Women's Workwear prices. While the price development of Men's Workwear shows growth, Women's Workwear has declined by 17.4%.

Table 6: 2020 Imports of workwear 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
Men's Workwear	€205 million	+11.2%	€21.35	+€2.35
Women's Workwear	€38 million	+19.2%	€33.21	-€7.01
TOTAL:	€243 million	+12.2%	€22.60	+€2.38

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 2020, the value of its workwear imports amounted to €198 million (up from €179 million in 2015). This corresponded to approximately 8 million units of clothing. In the last five years, the value of Belgium's workwear imports has grown at an average rate of 2.0% per year, while the import volume has grown 2.7% per year. During the same time, the value of imports from developing countries has declined on average by 2.7% per year with workwear from developing countries constituting over 44.7% of Belgium's imports in this product segment.

Men's Workwear currently constitutes 70% of workwear imports in Belgium (down from 83% in 2015). Women's Workwear has been outpacing Men's Workwear in terms of growth with a yearly average increase of 19.5%, while Men's Workwear is declining by 2.2%. Men's Workwear import unit prices are significantly lower than Women's Workwear prices, but both have undergone a negative price development in the last five years.

Table 7: 2020 Imports of workwear to Belgium by segment with 5-year growth, average import unit price and 5-year price evolution

BELGIUM	2020 Value (€)	5-year growth	Average unit price	5-year price change
Men’s Workwear	€138 million	-2.2%	€20.33	-€5.50
Women’s Workwear	€59 million	10.5%	€73.60	-€7.01
TOTAL:	€198 million	+2.0%	€25.96	-€0.88

The main workwear brands in Belgium include Blåkläder and Sioen.

Italy

Italy is the fifth largest import market for workwear in Europe. In 2020, the value of its workwear imports amounted to €184 million (up from €135 million in 2015). This corresponded to approximately 14 million units of clothing. In the last five years, Italy’s workwear imports have grown by 6.4% in value and 5.8% in volume. During the same time, the value of imports from developing countries grew an average of 6.8% per year, with workwear from developing countries constituting over 37% of the Italy’s overall workwear imports.

Men’s Workwear currently constitutes 80% of the workwear imports in Italy (down from 83% in 2015). Women’s Workwear has been outpacing Men’s Workwear in terms of growth with a yearly average increase of 10.4%. 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 29%, the Men’s segment has declined by -2% in the last 5 years.

Table 8: 2020 Imports of workwear 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
Men’s Workwear	€147 million	+5.5%	€12.92	-€0.26
Women’s Workwear	€37 million	+10.4%	€16.12	+€3.61
TOTAL:	€184 million	+6.4%	€13.46	+€0.40

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

Poland

Poland is the sixth largest import market for workwear in Europe. In 2020, the value of its workwear imports amounted to €148 million (up from €81 million in 2015). This corresponded to approximately 9 million units of clothing. In the last five years, the value of the Poland’s workwear imports has grown at an average rate of

12.9% per year, while the import volume has grown 7.5% per year. During the same time, the value of imports from developing countries has grown an average of 9.0% per year, with workwear from developing countries constituting 28% of Poland’s imports in this product segment.

Men’s Workwear constitutes 88.5% of workwear imports (up from 87.5% in 2015) and is growing by 13.1% every year, while the Women’s Workwear segment has been growing by 10.9%. Men’s Workwear unit prices are significantly lower than Women’s Workwear prices, with an almost €10 difference per unit. While Men’s Workwear showed a positive price development, Women’s Workwear has declined by 7%.

Table 9: 2020 Imports of workwear to the 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
Men’s Workwear	€131 million	+13.1%	€15.65	+€3.73
Women’s Workwear	€17 million	+10.9%	€26.10	-€1.92
TOTAL:	€148 million	+12.9%	€16.45	+€3.56

The main workwear brands in Poland include Poltext, Wordans, and Siatex.

Tips:

- Focus your export efforts on the top six markets: Germany, France, The Netherlands, Belgium, Italy, and Poland 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.
- Visit 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 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.

4. Which 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 wearing 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. Materials made of stretch fabrics, breathable technologies, and antibacterial fabrics have also experienced strong growth in 2020.

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. New welding methods for the seams use organic solvents and thus reduce the pollutant load in production and processing in the garment factories.

Many workwear companies collaborate for new technologies and manufacturing technologies, often directly with technology experts for electronic, optical or laser technologies. This enables the companies to develop new forms of workwear, which includes new functions such as light control, sensor recognition, remote control and (fall) protection capacities. Experts see these functions as the entry point for smart textile elements to workwear that supports the worker in the management of daily tasks and enhances the worker's safety (for example by the use of an integrated Fallbag for workers in heights).

Entirely new players are entering the market by introducing their new technologies to the industry. Likewise, BenQ Materials from Taiwan launched its Xpore membrane consisting of carbon and hydrogen in the winter of 2020. In the future, new material technologies like this might influence the workwear design.

Sustainability and natural fibres

As sustainability topics become increasingly popular, workwear companies are looking for ways to make their products eco-friendlier. In the search for fabric alternatives, textile engineers also rediscover familiar fibres, such as hemp or organic cotton. Sustainability pioneer Patagonia, for example, has just launched a pure workwear collection made of industrial hemp. The hemp fibre is considered particularly hard-wearing and durable. The Italian Oberalp Group, to which the outdoor brand Salewa belongs, has also been investing in rebuilding the Italian hemp tradition since 2016.

With potentially less disposable income to play with, companies will be keen to invest in pieces with longevity. This fuels a return to minimalism and an emphasis on quality. Neutral palettes and basic products are often used as a starting point and gets included in every standard workwear assortment these days.

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.

E-Commerce growing

As workwear has traditionally often been rented to the end-using companies, workwear is now customised to clients' individual needs and then sold in large bulks. Here, e-commerce has proven increasingly reliable and successful. Companies like Mascot, which likewise sports one of Europe's largest stock of workwear with more than 700 unique products that can be processed within 24-48 hours.

Work less or from home

Because of the Covid-19 pandemic, many workforces started to work from home or are affected by short-time work. Working from home and getting into contact with work mates, partners, and clients only by video chat has influenced the workwear of employees normally working in offices. In many cases, the workwear became more comfortable, especially on the employee's bottom part, which is not seen during video conferences. Smart t-shirts, cardigans and comfortable pullovers have become the status quo for many employees, reducing the overall need for traditional workwear.

Once the employees return to the office, this trend is expected to have influenced the overall dress code in many companies, allowing sneakers, relaxed blazers, smart joggers and other more comfortable outfits.

Hybrid workwear

In the last few years, consumers increasingly demanded workwear to be as comfortable and casual as possible. Consequently, many fashion brands for daily wear have become involved in the industry by offering hybrid apparel, which can be worn both at work or at home. Nike has been recently collaborating with Carhartt to develop a line of sneakers featuring a performance twist, lining the shoe with wool for added warmth, with fabrics forming the rest of the sneaker, including durable ripstop, mesh and corduroy. The shoe has a very casual look but is intended to fulfil the role of a work protective shoe.

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 safety.
- Design products that are multifunctional and can protect workers against multiple hazards, such as fires and chemical splashes. At the same time, the products should be fashionable and people should want to wear them.
- 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 was carried out on behalf of CBI by M-Brain GmbH.