

Exporting fast fashion to Europe

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As short fashion lifecycles drive demand for new collections, fast fashion has become a hot topic. Fast fashion mainly focuses on the low- to middle-end market. Efficient supply chains are vital in fast fashion, which has a standard turnaround time of just a few weeks. You need a thorough understanding of the latest European fashion trends. Nearshore suppliers may have a competitive advantage because their location allows for quick responses to market developments and cheaper transport.

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1. Product description

Fast fashion is a term used by fashion retailers for designs that move from catwalk to store in the fastest possible time, capturing current trends in the market.

This business model combines four elements:

- fashionable clothes mostly for young consumers;
- affordable prices in the mid-to-low range;
- quick response to consumer demand and reactions;
- frequent changes in the assortment.

This allows mainstream consumers to enjoy current clothing styles at much lower prices.

Three crucial factors characterise fast fashion consumption:

- market timing
- cost
- the buying cycle

The turnaround time from catwalk to consumer which normally takes three to six months, gets compressed into a few weeks, making efficient supply chains vital to the creation of fast fashion. Fast fashion retailers produce around 10 collections every season.

Quality

Functionality

Because fast fashion can apply to various types of garments across the apparel sector, the desired functionality varies per type of item.

Material

Due to the fast lead times, it is important to maintain flexibility and responsiveness in the manufacturing process. This should be considered when choosing materials for fast fashion apparel. Fabrics can be held in stock and then cut and dyed at the last minute to suit a fresh design. When targeting the growing niche market of sustainable fashion, give preference to materials with low environmental impact.

Fast fashion with quick manufacturing is typically a low-cost concept. Costs can be kept low by using low-cost raw materials in the manufacturing process, which can translate into lower product quality compared to slower fashion segments.

Size

The European apparel industry is pushing for standard sizing legislation, but so far sizing systems vary across Europe. [The European clothing standard EN 13402](#) can provide you with direction. This is a European sizing designation for clothes based on body dimensions and intervals.

The following table shows an example of differences in sizing within Europe. Each column represents the same size in a different system.

Table 2: Sizing across Europe

United Kingdom	Belgium and France	Norway, Sweden, Finland, Denmark, Netherlands and Germany	Portugal and Spain
Size 12	Size 40	Size 38	Size 42/44

Colour and design

Fast fashion centres bring the latest fashion trends to the market in a short time, so colours should match the target segment or demographic and designs should reflect the latest fashion trends in the target market segment.

Labelling

The most important information on the product label of apparel is:

- size
- origin
- wash and care instructions

The care labelling system developed by [GINETEX](#), the International Association for Textile Care Labelling, is widely used in European countries. The [GINETEX symbols](#) are also very common, but you can only use them under contract with the association.

According to GINETEX, labels should cover the following topics:

- general care and warnings

- washing
- drying
- ironing
- professional textile care or dry-cleaning

Ecolabelling is largely unregulated in the clothing industry. There are several voluntary labels that have their own defined set of standards for producers to follow.

Tips:

- Study common care labelling practices in Europe on the [GINETEX](#) website.
- If you produce eco-apparel, clearly indicate this with at least one of the available label schemes, such as the [EU Ecolabel](#), to attest the sustainability claims of your product.
- For more information on labelling, refer to the [section on buyer requirements](#).

Packaging

Documentation

External packaging documents for apparel should include: producer, consignee, composition, size, number of pieces, box identification, total number of boxes, and net and gross weight.

Importer specification

Each order should be packed according to the importer's instructions. They have their own specific requirements for the use of packaging materials, filling boxes, palletisation and stowing containers. Always ask for the importer's order specifications, which make part of the purchase order.

Damage prevention

Properly packaging apparel minimises the risk of damage. Packaging usually consists of each article being packed in a polybag to protect the fabric from humidity, water, solar radiation and staining.

Dimensions and weight

Packaging must be easy to handle in terms of size and weight and ideally fit together on Euro pallets. Standards are often related to labour regulations at the point of destination, specified by the buyer. When in doubt, check the dimensions and weight of boxes with your buyer.

Cost reduction

European buyers are constantly trying to reduce packaging materials. Less packaging means improved sustainability, but it also reduces costs and increases margins. While packing has to provide maximum protection, you must also avoid using excess materials and 'shipping air'. Waste removal of packaging materials generates additional costs to buyers.

Material

Importers have been steadily banning certain packaging materials for sustainability reasons, as well as to reduce costs with purchasing and disposing of packaging. Economical and sustainable packaging materials are growing more popular. Using biodegradable packing materials can be a market opportunity and, for some buyers, it can even be a requirement.

2. Which European markets offer opportunities for exporters of fast fashion?

There is no specific trade or production data available for fast fashion garments. Most apparel product categories contain both fast and slow fashion articles. This makes it complex to identify exactly how large the fast fashion market is.

For general apparel trade statistics, see our study on [which European markets offer opportunities for exporters of apparel](#). The study shows that Germany, France and the United Kingdom are leading on apparel demand and imports in Europe, along with Spain, Italy and the Netherlands. Their strong apparel imports from developing countries make these countries especially interesting markets for you.

China, Bangladesh and Turkey are your main competitors, as well as India, Cambodia, Vietnam, Pakistan and Morocco. Relatively nearshore suppliers, such as Turkey and Morocco, may have a competitive advantage when it comes to fast fashion. Their convenient location allows for quick responses to European market developments and relatively cheap transport. This also creates opportunities for competitors from Eastern Europe, as well as Spain and Portugal.

Tips:

- Compare your products and company to the strong competition from Turkey, Morocco, China, Bangladesh, India, Cambodia, Vietnam and Pakistan. Study your competitors also in countries such as Spain and Portugal, as well as Eastern Europe.
- You can use the [ITC Trade Map](#) to find exporters per country. You can compare by market segment, price, quality and target countries.

Real private consumption expenditure affects European demand

Private consumption expenditure is an important indicator for the European apparel market, a sector closely linked to economic conditions. When money is tight, consumers postpone buying non-essential items until they have more disposable income.

European private consumption expenditure increased over 2017 and 2018. This trend is expected to continue in 2019. This means that consumption of clothing is likely to rise, especially in emerging markets such as Poland, where the expected private consumption expenditure growth for 2019 is 3.3%. Consumers in mature markets already spend a fair amount of money on apparel, so consumption growth in these markets will be moderate.

3. What trends offer opportunities in the European market for fast fashion?

Digital retail

Opportunities for digital retail are available in the whole supply chain. Digital retail has often been applied to the end of the supply chain, where retailers sell to consumers, but it has much more potential. With e-commerce and social media on the rise, there is a growing trend of business-to-consumer models, with consumers increasingly buying directly from manufacturers. This also offers you opportunities.

Tip:

- Familiarise yourself with the additional opportunities that digital retail can offer you.

Maximising speed in supply chains

To increase speed and efficiency, manufacturers have been increasingly building their manufacturing and design rooms near their main buyers, changing the relationship between producers and buyers into more long-term partnerships.

New production methods such as automated factories, 3D printing and spraying not only enable waste reduction but also lead to more efficient supply chains. These methods could make overnight manufacturing a reality.

Tips:

- Consider how to shorten your supply chains in order to get your products to the consumer as fast as possible.
- To learn more about developments among retailers, see for example how [Zara looks to technology to keep up with faster fashion](#).
- Read our study on [3D design and print](#) to see how this technique can reduce your lead times.
- Preparing for robotisation and mass customisation is a must. Embrace automation by, for example, keeping close tabs on what buyers expect from you.

Fashion sharing

Some fashion watchers believe the effect of fashion sharing on traditional retailers could be profound, especially in fast fashion. Consumers will continue to buy everyday garments such as jeans, sweaters and shirts, but may turn to rentals for occasion-wear and statement pieces with a limited wardrobe lifespan. This sharing trend may reinforce an increasing polarisation, as consumers turn to sharing for high-end fashion and focus their spending on low-cost segments.

Tip:

- Decide whether to focus on high quality or on high volume and low cost.

Data analytics

Every company in the global apparel industry will have to join the big data game sooner rather than later not to lose out to the competition. Cost efficiency and personalisation constitute two key drivers of big data analytics in fashion. Rising customer demand for more personalised styles, fits and designs, as well as shorter delivery times, means fashion companies have to provide a far wider and more flexible range of options, while at the same time reducing stock.

Big data can help you get a precise understanding of buyers' and consumers' wishes. Knowing the interests and behaviour of buyers and consumers in your market will enable you to develop collections that are right in step with market demand. This trend will push a shift from mass production to mass customisation, which just means customisation at mass production efficiency.

Tip:

- For more information, see our study on [technology in the apparel industry](#).

Sustainability

There is a growing group of conscious consumers in Europe who value social and environmental responsibility. Using and promoting sustainable natural materials or recycled fibres is a key way to meet this demand, as well as obtaining certification and operating in a transparent way.

Tips:

- Use sustainable materials and production processes and consider developing sustainable concepts.
- Promote your sustainable values to increase your credibility and to boost your marketing.
- For more information, see our study on [sustainable apparel](#).

The disposability of fast fashion

Increasing amounts of clothing are ending up in landfills rather than being reused or recycled. With its short fashion lifecycles, fast fashion is an important contributor to this.

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

Tips:

- Research innovative, consumer-oriented programmes such as the [H&M Bring It campaign](#) and [Clever Care](#) to understand key sustainability issues in the European apparel sector.
- Explore new waste management solutions. If you promote it effectively, a strong or innovative waste management performance can significantly improve your market position and competitiveness, especially if you offer relatively sustainable apparel.

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

4. What are the requirements for fast fashion clothes to be allowed on the European market?

What are the legal and non-legal requirements for your product?

General product safety

The European Union's [General Product Safety Directive](#) applies to all consumer products, including apparel. It mandates all products marketed in Europe must be safe to use.

Tips:

- Read more about the [General Product Safety Directive](#).
- Use common sense to ensure normal use of your product does not cause any danger.

The [Safety Gate database](#) lists products that the European Union has rejected at the border or withdrawn from the market. Check the database for similar products to yours to consider issues that may arise.

Packaging legislation

Europe has specific [packaging and packaging waste legislation](#). These requirements aim to prevent the production of packaging waste, promote the reuse of packaging and thereby reduce the final disposal of such waste.

Restricted chemicals: REACH

The [REACH](#) regulation lists restricted chemicals in products that are marketed in Europe. For example, REACH restricts the use of azo dyes and certain flame retardants in textile products.

Tips:

- The European Chemical Agency provides useful information and tips on REACH. See for instance [REACH Annex XVII](#) for a list of all restricted chemicals. Check also the [Information on REACH for companies established outside Europe](#) and the [Q&As on REACH](#).
- Follow new developments in the field of flame retardants, as new alternatives are being developed. See for instance the [European Flame Retardants Association](#) (EFRA).

Textile Regulation

According to the European Union's [Textile Regulation](#), textile products should be labelled or marked to indicate their fibre composition in the language of the country where you are selling your products. These labels should be durable and tear resistant, securely attached, easily legible, visible and accessible.

Tip:

- For more information, see the [Frequently Asked Questions on the Textile Regulation](#).

Children's clothing

There is a [specific standard regarding the safety of children's clothing](#) intended for children up to the age of 14, which specifically regulates the use of cords and drawstrings. Customs authorities often reject clothes due to risk of suffocation, strangulation and injuries, particularly those for children up to seven years old.

Tip:

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

What additional requirements do buyers often have?

Sustainability

Social and environmental sustainability make your products stand out in the European market. Think of sustainable raw materials, fair working conditions and production processes. European buyers increasingly demand the following certification schemes and programmes:

- [Amfori Business Social Compliance Initiative \(BSCI\)](#): European retailers developed this initiative to improve social conditions in sourcing countries. They expect their suppliers to comply with the BSCI Code of Conduct. To prove compliance, the importer can request an audit of your production process. Once a company is audited, it is included in a database for all BSCI participants.
- [Ethical Trading Initiative \(ETI\)](#): This initiative is an alliance of companies, trade unions and voluntary organisations, which aims to improve the working lives of people across the globe who make or grow consumer goods.

You can use standards such as [ISO 14001](#), [Sedex](#) or and [SA 8000](#) to read up on sustainable options. Check with your potential buyers which certifications they require.

Tips:

- Optimise your sustainability performance. Studying the issues addressed by these initiatives will help you focus on the requirements that apply specifically to your product and your business.
- Buyers appreciate a well-grounded story. Showing that you value your company's environmental and social performance may provide you with a competitive advantage.
- Use a self-assessment tool such as the [BSCI Self-Assessment for Producers](#) or a code of conduct such as the [BSCI Code of Conduct](#) and the [ETI base code](#) to evaluate your performance.
- For more information, see our special study on [sustainability in the apparel sector](#).

What are the requirements for niche markets?

Fair trade

The concept of fair trade supports fair pricing and improved social conditions for producers and their communities. Especially when the production of your apparel is labour intensive, fair trade certification can give you a competitive advantage.

Common fair-trade certification awarding organisations include:

- [World Fair Trade Organisation \(WFTO\)](#)
- [Fairtrade International](#)
- [Fair Wear](#)

Tips:

- Ask buyers what they might be looking for. Especially in the fair-trade sector, you can use the story behind your product for marketing purposes.
- Check the [ITC Standards map database](#) for more information on voluntary standards and their requirements, including fair production.

Sustainable textile certification

Sustainability is gaining ground across the apparel sector and so is interest from buyers for sustainable textile certification.

The [Global Organic Textile Standard \(GOTS\)](#) certifies environmental and social responsibility throughout the production chain. To qualify, textile products must have more than 70% organic fibres.

The [OEKO-TEX Standard 100](#) certification ensures responsible use of chemicals, while the [Sustainable Textile Production \(STeP\) by OEKO-TEX®](#) certification ensures that textile manufacturing and processing takes place in a sustainable manner. Textiles with the [MADE IN GREEN by OEKO-TEX®](#) label are:

- made from materials that have been tested for harmful substances;
- manufactured using environmentally friendly processes;
- produced under safe and socially responsible working conditions.

The [EU Ecolabel](#) for textiles focuses on minimising environmental impact at the manufacturing stage.

Tips:

- Read more on [GOTS](#), [OEKO-TEX](#) and the [EU Ecolabel](#) in the ITC Standards Map.
- Determine which certification programme would be the best fit for you and apply if possible.

For more information, see our study on [buyer requirements for apparel](#).

5. What is the competition like in the European fast fashion market?

The field of competition in fast fashion in Europe is comparable to that of the overall apparel market. However, competition is fiercer as there are more competitors targeting this group. Refer to our [10 tips for doing business with European buyers](#).

6. Through what channels can you get fast fashion on the European market?

Market channels

In general, apparel retailers make up the most commonly used channel for apparel sales in Europe. This channel accounts for 40% to 60% of distribution in most European countries. Some retailers appeal more to young consumers while others target older demographics.

Trade associations and fairs

These trade fairs are useful sources for finding trading partners in Europe:

- [Apparel Sourcing](#), France
- [CIFF](#), Denmark
- [Panorama](#), Germany
- [Première Vision](#), France
- [Who's Next](#), France

The European Apparel and Textile Confederation, [EURATEX](#), and the International Apparel Federation, [IAF](#), can also be helpful for finding trading partners in Europe.

Market segments

The fashion market can be generally broken down into the low- to middle-end segment, the middle-end segment and the high-end or haute couture segment.

The low- to middle-end segment includes the mass market and fast fashion brands that have good designs but at low prices, or brands that are slightly pricier but not as expensive as middle-end brands. This is the largest market segment. Most large fast fashion retailers are part of this segment, such as [H&M](#), [Zara](#), [Primark](#) and [C&A](#).

The middle-end segment includes more expensive brands. The high-end or haute couture segment includes the most expensive and creative brands. This segment has the highest quality and generally contains clothes that are made for special occasions.

7. What are the end market prices for fast fashion?

The European consumer price for your apparel will be around four to six-and-a-half times your selling price or even more if you would cater to the high-end segment. Shipping, import and handling add 15–20%. Wholesalers account for a further 40–70% markup. Retailers may add at least another 90–150% to the price. Finally, European VAT rates range from 18% in Malta to 27% in Sweden.

Your original selling price depends heavily on the availability and cost of raw materials. For example, the average prices of cotton fluctuated considerably in recent years. Occasional increases in the price of raw materials are not directly passed on to the consumer, but do put pressure on exporters, importers and retailers' margins.

Tips:

- The perceived value of your product in the chosen segment determines its price. The quality and price of your garments must match what is expected in your chosen target segment. Study consumer prices in your target segment to determine and adjust your price accordingly. Use top-down calculation to determine your maximum selling price.
- Understand your segment. Offer a correct marketing mix to meet consumer expectations. Adapt your business model to your position in the market.

Please review our [market information disclaimer](#).