

# The European market potential for fashion sportswear

Europe's sportswear imports are valued at €15.1 billion and show rapid growth rates of 7.2% per year. Sportswear is growing strongly in Europe because of the social trend towards healthier and more active lifestyles among all age groups, as well as the increasing popularity of sportswear worn as casualwear in Europe. Anoraks, windcheaters and similar is the biggest category in the Fashion Sportswear segment, accounting for approx. 73 to 86% of its total value. The biggest import markets include Germany, France, Italy, Spain, the United Kingdom and the Netherlands. In Germany, the UK and the Netherlands, the tracksuits category is the fastest growing product category with a significant growth in price per unit, offering great opportunities to fashion sportswear exporters.

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## 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 (incl. 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).

## 2. What makes Europe an interesting market for fashion sportswear?

Europe is one of the more significant importers of fashion sportswear in the world. In 2019, the value of fashion sportswear imports to Europe accounted for €15.1 billion, up from €10.7 billion in 2014. This corresponded to roughly 818 million units of fashion sportswear clothing in 2019 (up from 690 million in 2014). During the last five years, the value of the EU's fashion sportswear imports has been growing by an average of 7.2% annually, which is above the average growth of all EU apparel imports as reported in [the CBI study "What is the Demand?"](#). This means that fashion sportswear and its subsegments are a significant contributor to the apparel product segment groups in the EU, and effectively the drivers of the EU market. 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 sports apparel. In 2019, it exported €11.5 billion worth of fashion sportswear (up from €7.7 billion in 2014). EU fashion sportswear exports have been growing at an average yearly rate of 8.3% between 2014 and 2019. The biggest markets outside the EU for European exporters are USA, Hong Kong, Japan, China, Russia, Korea, Turkey, Canada, UAE, Ukraine.

The biggest EU exporters in 2019 were Italy (€2.4 billion), Germany (€2.1 billion), France (€1.3 billion), the Netherlands (€1.1 billion), Spain (€1.0 billion) and Belgium (€895 million). Together, these six countries represent 77% of the EU's fashion sportswear exports. Spain, the Netherlands and Germany have seen the strongest export growth within this group, with an average yearly increase between 9.8% and 12.3%. In comparison, France has been growing at a much lower rate, with only 3.8% growth per year in the last five years. Cyprus (37.2%), Greece (32.2%), Czech Republic (18.7%), Croatia (18.5%) and Slovenia (17.5%) are the top 5 fastest growing exporting countries. The Czech Republic is currently the tenth largest fashion sportswear exporter in Europe and may outpace the other countries if the growth rate keeps up.

Table 1: Top 10 EU Fashion sportswear exporters, 2019 EUR value; average yearly growth

Country	Value	5-yr growth
Italy	€2.4 b	↑ 8.1%
Germany	€2.1 b	↑ 9.8%
France	€1.3 b	↑ 3.8%
Netherlands	€1.1 b	↑ 12.3%
Spain	€1.0 b	↑ 11.2%
Belgium	€895 m	↑ 8.8%
United Kingdom	€523 m	↑ 4.8%
Poland	€498 m	↑ 13.5%
Denmark	€310 m	↑ 0.1%
Czech Republic	€283 m	↑ 18.7%
Source: Eurostat		

The value of EU fashion sportswear imports is rather evenly split between sportswear originating from inside the EU and sportswear originating from outside the EU, which are at 49% and 51% respectively. In 2019, suppliers from developing countries contributed 16% of all fashion sportswear imports into the EU in terms of value (up from 9.4% in 2014) and suppliers from the rest of the world accounted for 35% of the import value (down from 46.5% in 2014). The share of the fashion sportswear imported from developing countries is lower than the

overall share of EU apparel imports from developing countries, which indicates that there is still unfulfilled potential in the sportswear segment. The value of EU fashion sportswear imports originating from developing countries corresponded to €2.4 billion in 2019 and has grown at an average yearly rate of 19.4% since 2014 – almost double the overall fashion sportswear import growth rate. This demonstrates that there is a strong demand for fashion sportswear from developing countries.

Europe's extra-EU fashion sportswear imports are dominated by Asian countries, with China, Bangladesh and Vietnam being the top three exporters. Together, these three countries account for 35% of all fashion sportswear imports into the EU. China is the single largest sportswear exporter to the EU with 24.3% of the EU imports value in 2019. It is followed by Bangladesh with 5.8% and Vietnam with 4.6%. Other extra-EU fashion sportswear exporters have market shares between 0.9% and 2.2% of the overall fashion sportswear import value. Bangladesh, Vietnam, Myanmar, Cambodia, Turkey, Pakistan and Morocco increased their share of sportswear imports in the last five years due to a growth rate that was higher than the overall growth rate for fashion sportswear imports. Bangladesh and Myanmar were the strongest growers, both increased their share by ~1.8%. Myanmar has seen the most spectacular growth during that period, with its fashion sportswear exports growing by an average 65.2% each year, taking its exports from €51.6 million in 2014 to €635.8 million in 2019. During the same period, China's exports of fashion sportswear declined while India and Indonesia have grown at much lower rates than the overall fashion sportswear market (7.2%), resulting in a decline in market share.

The intra-EU fashion sportswear imports are dominated by Germany with 11.7% of market share (equivalent to a market value of €1.8 billion). It is followed by Italy with 5.7%, the Netherlands with 5.3% and Belgium with 4.9%. Germany, Italy, Belgium, Spain, Poland, France, the UK and the Czech Republic have each increased their market shares, although only Germany saw significant growth, with a 1.3% increase from 2014 to 2019. The Netherlands and Denmark lost market share during the same time period.

Table 2: Top 10 extra-EU and intra-EU Fashion sportswear exporters to EU, 2019 EUR value; average yearly growth

Country	Value	5-yr growth		Country	Value	5-yr growth
Top Extra-EU Fashion Sportswear Exporters				Top Intra-EU Fashion Sportswear Exporters		
China	€3.7 b	↓ 0.9%		Germany	€1.8 b	↑ 9.7%
Bangladesh	€878 m	↑ 21%		Italy	€866 m	↑ 11.1%
Vietnam	€690 m	↑ 8.2%		Netherlands	€797 m	↑ 6.7%
Myanmar	€636 m	↑ 65.2%		Belgium	€735 m	↑ 14.2%
Cambodia	€333 m	↑ 15.1%		Spain	€647 m	↑ 12.3%
Turkey	€281 m	↑ 13.5%		Poland	€500 m	↑ 20.3%
India	€191 m	↑ 4.3%		France	€473 m	↑ 9.9%

Indonesia	€170 m	↑ 0.1%		United Kingdom	€393 m	↑ 9.9%
Pakistan	€143 m	↑ 9%		Denmark	€257 m	↑ 0.4%
Morocco	€135 m	↑ 12.1%		Czech Republic	€219 m	↑ 16.7%

### 3. Which European countries offer the most opportunities for fashion sportswear?

Europe is home to some of the world's most prominent sportswear companies, such as Adidas, Puma and Fila. Germany and Italy lead in terms of their number of sportswear companies and brand recognition, but aside from companies that are purely sportswear focused, many fashion brands are also introducing their sportswear offering.

Western European markets are much larger and better developed than Central and Eastern European markets. The top sportswear import markets in the EU are Germany, France, Italy, Spain, United Kingdom and the Netherlands. These top six countries together account for 71.7% of fashion sportswear imports in the EU and have been growing at an average rate of 7.5% per year in the last five years. Other important markets include Belgium with €761 million and 9.9% average yearly growth and Poland with €967 million imports value and a 13.3% average yearly growth. While Central and Southeastern European imports are growing at higher rates than those in the West, their numbers are still relatively small. Poland is a market to watch due to its quick growth in imports of fashion sportswear and a relatively large market. If its growth continues at the same level, it will become the seventh largest EU market for sportswear next year. [Intersport](#), [Decathlon](#) and [Sport 2000](#) are the largest sports retailers in Europe for active and fashion sportswear. [Zalando](#), [C&A](#), [H&M](#) are the largest retailers when it comes to fashion in general, including sportswear.

Table 3: Top 10 EU importers of fashion sportswear, 2019 EUR value; average yearly growth

Country	Value	5-yr growth
Germany	€3.1 b	↑ 3.7%
France	€1.8 b	↑ 7.5%
Italy	€1.6 b	↑ 4.9%
Spain	€1.5 b	↑ 10.5%
United Kingdom	€1.5 b	↑ 7.9%
The Netherlands	€1.4 b	↑ 10.7%
Belgium	€761 m	↑ 9.9%

Poland	€697 m	↑13.3%
Austria	€518 m	↑7%
Sweden	€405 m	↑7.8%

Source: Eurostat

Table 4: Top 10 EU importers of fashion sportswear from developing countries, 2019 EUR value; average yearly growth

Country	Value of imports from developing countries	5-yr growth	Share of imports from developing countries
Germany	€670 m	↑15.1%	21.85%
Spain	€513 m	↑26%	34.04%
Italy	€227 m	↑12.7%	14.09%
The Netherlands	€216 m	↑17.1%	15.41%
United Kingdom	€209 m	↑11.6%	14.11%
Belgium	€185 m	↑24.4%	24.26%
France	€169 m	↑20%	9.42%
Denmark	€94 m	↑90.4%	26.51%
Poland	€55 m	↑98.7%	7.89%
Sweden	€43 m	↑27.7%	10.67%

Source: Eurostat

## Germany

Germany is the largest import market for fashion sportswear in Europe. In 2019, the value of its fashion sportswear imports amounted to €3.1 billion (up from €2.6 billion in 2014). This corresponded to approx. 169 million units of clothing. In the last five years, the value of Germany's fashion sportswear imports has grown at an average rate of 3.7% per year, while the import volume has grown at 1.0% per year. The most popular German sportswear brands include Adidas and Puma, Jako, Reusch, Uhlsport, Schöffel, Ortlieb, and Vaude.

The women's or girl's anoraks category constitutes the bulk of Germany's fashion sportswear imports. The category accounts for 51% in value terms and the share remained relatively stable in the last 5 years. The total value of this category was €1.6 billion. The second largest category is Men's or boy's anoraks with a total value

of €1 billion. Men's and women's anoraks experienced 3.2-3.8% growth in the last five years. The fastest growing product category within fashion sportswear is Tracksuits (average growth 5.1%), but the volumes remain low (€472 million in 2019). This category also has a higher average unit price (€57.6) than anoraks (€14.3 - €19.9).

Table 5: 2019 Imports of fashion sportswear to Germany with 5-year growth, average import unit price and 5-year price evolution

GERMANY	2019 Value (€)	5-year growth	Average unit price	5-year price change
Tracksuits	€472 m	5.1%	€ 57.60	€ 24.03
Men's or boy's anoraks	€1.034 m	3.8%	€ 19.88	€ 1.50
Women's or girl's anoraks	€1.560 m	3.2%	€ 14.29	€ 1.45
TOTAL:	€3.067 m	3.7%	€ 18.10	€ 2.26

In the last five years, intra-EU Fashion Sportswear imports have been significantly outpacing extra-EU imports (9.0 % to 0.7%). The major intra-EU exporters to Germany include the Poland, Netherlands, Italy, the UK and Belgium. Major exporters of Fashion Sportswear to Germany from developing countries include China, Bangladesh, Myanmar, Vietnam and Cambodia. China's Sportswear exports to Germany have been declining on average by 5.9% per year for the past 5 years.

## France

France is the second largest market for fashion sportswear in Europe, with a value of €1.8 billion in 2019 (up from €1.2 billion in 2014). This corresponded to approx. 86 million units of clothing in 2019. In the last five years, the value of France's fashion sportswear imports has grown at an average rate of 7.5% per year, while the import volume has grown at 4.5% per year. The most popular French sportswear brands include Lacoste, Lafuma, Eider, Oxbow, Le Coq Sportif, Rossignol, Decathlon, Aigle and Black Crows.

Women's or girl's anoraks category constitutes the bulk of France's fashion sportswear imports. The category accounts for 41% in value terms and its market share remained relatively stable in the last 5 years. The total value of this category was €744 million and it experienced an average 8.4% growth in the last 5 years. The second largest category is Men's or boy's anoraks with a total value of €586 million. Men's and boy's anoraks grew at 6.6% in 2014-2019. Tracksuits accounts for 26% of fashion sportswear imports in France. The average unit price for tracksuit is as high as €47.9, compared to €14.7-22.6 for anoraks. Major exporters of Fashion Sportswear to France from developing countries are China, Vietnam, Bangladesh, Myanmar, Tunisia, India.

Table 6: 2019 Imports of fashion sportswear to France with 5-year growth, average import unit price and 5-year price evolution

FRANCE	2019 Value (€)	5-year growth	Average unit price	5-year price change
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Tracksuits	€465 m	7.0%	€ 47.88	€ 16.98
Men's or boy's anoraks	€586 m	6.6%	€ 22.59	€ 3.60
Women's or girl's anoraks	€744 m	8.4%	€ 14.72	€ 1.01
TOTAL:	€1.795 m	7.5%	€ 20.83	€ 2.75

## Italy

Italy is the third largest import market for fashion sportswear in the EU. In 2019, the value of its fashion sportswear imports amounted to €1.6 billion (up from €1.3 billion in 2014). This corresponded to approx. 70 million units of clothing in 2019. In the last five years, the value of Italy's fashion sportswear imports has grown at an average rate of 4.9% per year, while the import volume has grown at 2.7% per year. The most popular Italian sportswear brands include Fila, Kappa, Lotto, Diadora, Errea, Legea, Macron.

Unlike in Germany and France, Italy's biggest fashion sportswear category is men's or boy's anoraks, which accounts for 48% of the imports value, up from 44% in 2014. Women's or girl's anoraks account for 37% and tracksuits for 14%. Men's or boy's anoraks category has seen the strongest growth (7.2%) in 2014-2019, which above the average growth of fashion sportswear (4.9%). The average unit price of fashion sportswear imports is at €23 which is €2.32 higher than in 2014. This is the highest average unit price for fashion sportswear in the top six. Major exporters of fashion sportswear to Italy from developing countries include China, Vietnam, Myanmar, Bangladesh, and Cambodia.

Table 7: 2019 Imports of fashion sportswear to Italy with 5-year growth, average import unit price and 5-year price evolution

ITALY	2019 Value (€)	5-year growth	Average unit price	5-year price change
Tracksuits	€229 m	1.8%	€ 23.69	€ 5.21
Men's or boy's anoraks	€780 m	7.2%	€ 24.54	€ 2.70
Women's or girl's anoraks	€600 m	3.5%	€ 21.04	€ 0.55
TOTAL:	€1.609 m	4.9%	€ 23.00	€ 2.32

## Spain

Spain is the fourth largest import market for fashion sportswear in the EU. In 2019, it had fashion sportswear imports valued at €1.5 billion (up from €915 million in 2014). This corresponded to approx. 105 million units of clothing in 2019. In the last five years, the value of Spain's fashion sportswear imports has grown at an average rate of 10.6% per year, while the import volume has grown at 8.3% per year. The most popular Spanish sportswear brands include Joma, Kelme, Luanvi.

The women's or girl's anoraks category constitutes the bulk of Spain's fashion sportswear imports. The category accounts for 43% in value terms, up from 40% in 2014. The total value of this category was €649 million in 2019 and it grew at 12.3% on average in the last 5 years. The second largest category is men's or boy's anoraks with a total value of €505 million and an 11.6% average growth rate between 2014 and 2019. Both categories have outperformed the growth rate of the overall fashion sportswear imports. The average unit price of fashion sportswear imports was €14.43 in 2019, which is €1.42 higher than it was in 2014. Major exporters of fashion sportswear to Spain from developing countries include China, Bangladesh, Myanmar, Turkey and Morocco.

Table 8: 2019 Imports of fashion sportswear to Spain with 5-year growth, average import unit price and 5-year price evolution

SPAIN	2019 Value (€)	5-year growth	Average unit price	5-year price change
Tracksuits	€359 m	6.5%	€ 42.22	€ 21.03
Men's or boy's anoraks	€505 m	11.6%	€ 12.61	€ 0.73
Women's or girl's anoraks	€649 m	12.3%	€ 11.53	€ 0.71
TOTAL:	€1.512 m	10.6%	€ 14.43	€ 1.42

## The United Kingdom

The UK is the fifth largest import market for fashion sportswear, with a 2019 value of €1.5 billion (up from €1.0 billion in 2014). This corresponded to approx. 69 million units of clothing in 2019. In the last five years, the value of the UK's fashion sportswear imports has grown at an average rate of 7.9% per year, while the import volume has declined at 1.5% per year. The most popular British sportswear brands include Admiral, Reebok, Umbro, Gilbert, Gola, Gray-Nicolls, Halbro, Sundried, Soar, Iffley Road, Sweaty Betty.

The men's or boy's anoraks category constitutes the bulk of the UK's fashion sportswear imports, accounting for 41%. The women's or girl's anoraks category accounted for 32% of the UK's fashion sportswear imports, down from 38% in 2014. Tracksuits have been growing at 12.7% between 2014 and 2019, making it the UK's fastest growing product category. The average unit price of fashion sportswear imports was at €21.33, which is €7.83 higher than it was in 2014. The unit price for the tracksuits category is the highest (€38.35), followed by men's and women's anoraks (€20.11 and €16.45 respectively). Major exporters of sportswear to the UK from developing countries include, China, Vietnam, Bangladesh, Myanmar, Cambodia and India.

Table 9: 2019 Imports of fashion sportswear to United Kingdom with 5-year growth, average import unit price and 5-year price evolution

THE UK	2019 Value (€)	5-year growth	Average unit price	5-year price change
Tracksuits	€402 m	12.7%	€ 38.35	€ 3.56



Men's or boy's anoraks	€600 m	8.4%	€ 20.11	€ 7.28
Women's or girl's anoraks	€478 m	4.2%	€ 16.45	€ 6.02
TOTAL:	€1.480 m	7.9%	€ 21.33	€ 7.83

The United Kingdom left the EU in January 2020. Currently Brexit is still in the transition period until the end of 2020, but this period cannot be extended beyond that. There are still many uncertainties around the trade conditions both for countries within the European Union and developing countries. The United Kingdom will likely conclude its own free trade agreements, independently of the European Union, hoping for more openness and benefits from agreements with third countries. The developments may have a positive effect on the trade with developing countries.

## The Netherlands

The Netherlands is the sixth largest imports market for fashion sportswear in the EU, with a value of €1.4 billion in 2019 (up from €844 million in 2014). This corresponded to approx. 64 million units of clothing in 2019. In the last five years, the value of the Netherlands' fashion sportswear imports has grown at an average rate of 10.7% per year, while the import volume has grown at 2% per year. The most popular Dutch sportswear brands include Quick, Hi-Tec and Mogema.

The men's or boy's anoraks category accounts for 42% (up from 39% in 2014), while the women's or girl's anoraks category accounts for 36% (down from 45% in 2014). Tracksuits (17.6% per year in the last five years) is the fastest growing product category within fashion sportswear imports in the Netherlands, followed by men's or boy's anoraks (12.3%), which are all above the average annual growth of the overall fashion sportswear imports (10.7%). The average unit price of fashion sportswear imports is €21.81, which is €7.30 higher than in 2014. Major exporters of fashion sportswear to the Netherlands from developing countries include China, Bangladesh, Vietnam, Myanmar, and Turkey.

Table 10: 2019 Imports of fashion sportswear to the Netherlands with 5-year growth, average import unit price and 5-year price evolution

NETHERLANDS	2019 Value (€)	5-year growth	Average unit price	5-year price change
Tracksuits	€314 m	17.6%	€ 151.91	€ 119.11
Men's or boy's anoraks	€587 m	12.3%	€ 18.92	€ 3.40
Women's or girl's anoraks	€500 m	5.8%	€ 16.06	€ 4.57
TOTAL:	€1.401 m	10.7%	€ 21.81	€ 7.30

## Tips:

Focus your export efforts on the top six markets: Germany, France, Italy, Spain, the United Kingdom, and the Netherlands because they are both the biggest apparel consumers in Europe and 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 the highest average import prices and a positive price evolution over the last five years.

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. If you are not currently an exporter to the UK, Brexit may open up new opportunities for your business. [Visit the website 'get ready for the UK Transition'](#) for more information on this topic and the potential impact on your business.

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.

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

2020 sportswear fashion trends include a traditional aesthetic consisting of technical fabrications, neon hues, color blocking and bold branding. For men's fashion sportswear, a softer and more subtle iteration of the trend emerged with softer color palettes of grey and beige hues with an injection of pastel. In the women's fashion sportswear category, especially high-shine and coated fabrics, metallic (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 a rising demand. Leggings with pockets (as from [Lascana](#)) and "zip leggings" were trending pieces.

### 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 optimise 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 has led to 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 physical 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 the lockdown and confinement. Fashion and the outward appearance became less important. The sub-sector of sportswear and athleisure clothes was the only exception, benefitting from a shift to remote working 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, rose 155% in the second quarter and Nike aims for digital to account for 50% of its overall business, up from the current 30%). The pandemic is seen as a turbo boost towards online retail, a trend that is expected to stay post-pandemic, as 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 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.

The principal of a circular economy gained momentum in 2020 in the sportswear category, meaning recycling garments back into the constituent elements so the manufacturing process can begin again without the need for virgin material - preserving the planet's depleting resources. Two recent examples:

- 1) [Sustainable fashion brand Presca announced](#) in September 2020 that it is working with Poseidon Plastics and Teeside University on a range of "fully circular" sportswear.
- 2) Swiss-based high-performance [running brand "On", announced](#) in September 2020 the launch of its world-first, subscription-based service to bring fully recyclable sportswear to its 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 digitisation, cancelled trade fairs and limited travelling (e.g. B2B platforms like [Textdome](#) 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 styles according to the trends. Visit European fashion sportswear

brand's websites to understand the current trends. Speak to stylists and do research to understand the coming styles for fashion sportswear in 2021.

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 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 [Textdome](#).

Consider offering fashion sportswear D2C alongside with B2B activities. You can sell through your own web shop, existing online platforms such as [ebay](#) and [Amazon](#) or through social media.


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

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