

Entering the European market for workwear

Some of the world's most interesting markets for workwear are in Europe. However, setting up a business relationship with European buyers can be challenging. This report will help you understand what the most important requirements and opportunities are in the European market. You will learn about the rules and regulations for exporting workwear to Europe, about the best channels to get your product to the market, about the countries where your competitors are and the best ways to provide quotes for potential buyers.

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1. What requirements must workwear comply with to be allowed on the European market?

If you want to sell workwear in the European market, you need to comply with several requirements, some of which are mandatory, whether they are legal requirements or not. Others are voluntary, but meeting them can give you a competitive advantage. Some requirements only apply to certain niches in the workwear market.

Mandatory requirements

The many legal requirements for exporting workwear to Europe include those concerning product safety, the use of chemicals (REACH), quality and labelling. Additionally, many buyers have created non-negotiable terms and conditions for all of their suppliers to comply with. Although these requirements are not required by law, they are still mandatory.

Product safety

Any item for sale in the EU, including workwear, must comply with the EU's General Product Safety Directive ([GPSD: 2001/95/EC](#)). European Union Member Countries will check if your product meets the applicable safety requirements. If your product is considered unsafe, it will be rejected or withdrawn from the European market.

On top of the GPSD, the EU has laid down specific health and safety standards ([Regulation \(EU\) 2016/425](#)) for the design, manufacturing, use of materials, testing and user instructions concerning protective wear or personal protective equipment (PPE). If you want to manufacture and export PPE to Europe, you must comply with these standards.

The EU has determined three categories of risk against which PPE is intended to protect. The categories are specified below. If you produce Category I PPE, you can perform the necessary tests to comply with Directive 2016/425 yourself. If you produce Category II PPE, an independent testing institution must carry out the tests to assess compliance. Category III PPE is subject to regular ongoing testing.

Category I includes exclusively the following minimal risks:

1. superficial mechanical injury;
2. contact with cleaning materials of weak action or prolonged contact with water;
3. contact with hot surfaces not exceeding 50°C;
4. damage to the eyes due to exposure to sunlight (other than during observation of the sun);
5. atmospheric conditions that are not of an extreme nature.

Category II includes risks other than those listed in Categories I and III;

Category III includes exclusively the risks that may cause very serious consequences, such as death or irreversible damage to health relating to:

1. substances and mixtures which are hazardous to health;
2. atmospheres with oxygen deficiency;
3. harmful biological agents;
4. ionising radiation;
5. high-temperature environments whose effects are comparable to those of an air temperature of at least 100°C;
6. low-temperature environments whose effects are comparable to those of an air temperature of -50°C or less;
7. falling from a height;
8. electric shock and live working;
9. drowning;
10. cuts by handheld chainsaws;
11. high-pressure jets;
12. bullet wounds and knife stabs;
13. harmful noise.

User instructions

You must supply user instructions with any item of PPE that you export to Europe. These instructions must include, among other things, your company name and address, and information on: the proper ways to store, clean, maintain and disinfect the product; the protection level; the risk against which the PPE is designed to protect, and the name, address and identification number of the organisation that has tested your product.

Check article 1.4 of Annex II of [EU Directive 2016/425](#) for a full overview of the information that you must include in the user instructions.

Technical documentation

In addition to user instructions, you must supply technical documentation with any item of PPE that you export to Europe. The technical documentation must include (among other things): a complete description of the PPE and its intended use; an assessment of the risks against which the PPE is intended to protect; a list of the essential health and safety requirements that apply to the product; design drawings of the PPE and test reports.

Check Annex III of [Regulation \(EU\) 2016/425](#) for a full overview of the information that you must include in the technical documentation.

REACH

All apparel items exported to the EU, including workwear, must comply with the REACH Regulation, which stands for registration, evaluation, authorisation and restriction of chemicals. This regulation restricts the use of many chemicals in apparel and specific materials used for trims. The use of these chemicals in workwear is either restricted or prohibited altogether.

Chemicals commonly used in workwear production, which are restricted under REACH include:

- Azo dyes which may release one or more of the 22 aromatic amines listed in [Appendix 8 to the REACH Regulation](#); nonylphenol and nonylphenol ethoxylates; heavy metals, such as mercury, cadmium and lead;
- Flame retardants, such as tris (2,3-dibromopropyl) phosphate; tris (aziridiny) phosphin oxide and polybrominated biphenyls (PBB);
- Waterproofing and stain-repelling chemicals, such as perfluorooctane sulfonic acid and its derivatives (PFOS), which were originally restricted under REACH, but are now restricted under the Stockholm

Convention;

- Nanomaterials used to make fabrics antibacterial;
- Nickel, a restricted compound in metal trims and accessories (zippers, buttons, jewellery);
- Polycyclic-aromatic hydrocarbons (PAHs) and phthalates used in plastic and PVC parts;
- Asbestos fibres;
- Formaldehyde.

Labelling

You must affix [CE marking](#) to PPE as a visible indication that your product conforms with the PPE health and safety requirements. You must affix the CE marking to the PPE 'visibly, legibly and indelibly'. Users must be able to see the label. Text and symbols must be sharp and clear and they must not fade. If it's not possible to affix the CE marking to the PPE itself, you must affix it to the packaging and accompanying documents.

Read more on [the EU's rules and regulation for affixing CE marking to PPE](#).

You must also specify the material content of every workwear item that you export to the EU, in accordance with EU [Regulation 1007/2001](#).

If you use the care symbols recommended in the internationally recognised standard for care labelling [ISO 3758: 2012](#), be aware that the care symbols are property of the company [GINETEX](#). You need to pay a fixed compensation to GINETEX for the use of these symbols.

Intellectual property rights

If you are selling your own designs in the European market, you must make sure you are not violating any intellectual property (IP) rights. If your buyer provides the design, they will always be liable in case the item is found to violate a property right.

Complying with intellectual property rights also means you cannot copy nor share designs from one buyer with another. Buyers will expect you to handle their designs prudently.

Non-legal mandatory requirements

In addition to the legal requirements mentioned above, you may be required to comply with non-negotiable terms and conditions that buyers have created for their suppliers. Such requirements are not required by law, but they are still mandatory.

Sustainable production and social responsibility

European workwear companies, primarily those operating in the B2B market, have been among the first buyers to require and invest in sustainable production and social responsibility. This is because CSR requirements, which are often laid down in tenders, tend to be stricter in the B2B market than in the B2C market. Another reason is that the relatively low pressure on delivery time and price and the high level of vertical integration in the workwear market in comparison with the fashion market, enables buyers to invest in ethical production practices.

At the very least, buyers will ask you to open your factory doors for them, so they can conduct personal inspections of your factory. Additionally, you may be requested to comply with the following independent standards:

- Standard 100 by [Oeko-Tex](#) is the most widely required standard regarding harmful substances and sustainable production. European buyers may also require standards such as the [EU Ecolabel](#), [BCI](#) (Better Cotton Initiative), [GOTS](#) (Global Organic Textile Standard) and [Bluesign](#).
- Regarding the use of recycled or circular materials, buyers may require standards such as the [GRS](#) (Global

Recycled Standard) or [C2C](#) (Cradle to Cradle).

- Regarding social responsibility, [BSCI](#) (Business Social Compliance Initiative) is the most popular certification that European buyers require. Other popular CSR standards include [FWF](#), [WRAP](#), [SEDEX](#), [ETI](#), [SA8000](#), [ISO 26000](#), and [Fair Trade](#).

Packaging requirements

In most cases, your buyer will give you instructions on how to package the order. If you agree with your buyer that they will clear customs in the country of import, which is the norm in the apparel industry, it is their responsibility to make sure the instructions comply with EU import procedures.

The packaging instructions will be written down in a packing manual. In this document, you will find all relevant packing instructions concerning:

- type and quality of the packing material you need to use;
- size of the packing material;
- information that should be mentioned on the packing material, including style references and numbers, size breakdown, number of pieces and colourways;
- placement and position of barcodes;
- way of stacking;
- maximum quantity in a box or polybag;
- maximum weight of an export carton;
- nominated suppliers for the packing material.

Your buyer will also appreciate any efforts you make to reduce the environmental impact and the financial cost of using packaging materials. First, you can make suggestions on how to use less packaging materials. Another option is to use environmentally friendly alternatives, such as recycled and biodegradable materials.

Payment terms

In most cases, a European buyer will pay you a percentage of the total sum of the order, for example 30% of it, when they place the order and the rest (70% in the example) after the order is completed. The most used payment method in the apparel industry for such a transaction is the letter of credit (LC). An LC obligates a buyer's bank to pay the supplier when both parties meet the conditions they have agreed upon.

In another case, a buyer might ask for a telegraphic transfer (TT) after 30, 60, 90 or sometimes even 120 days. This means you, as a manufacturer, finish the production and hand over the shipment to the buyer, including the original documents before payment is due. The payment will be made after the number of days that you have agreed on with the buyer. This is a risky payment agreement because you take full financial risk.

AQL

To guarantee product quality, your buyer may set an AQL, which stands for acceptance quality limit or acceptable quality level. An AQL is the lowest tolerable quality level a buyer will accept. For example, AQL 2.5 means that your buyer will reject a batch if more than 2.5% of the whole order amount over several production runs is defective.

Tips:

For country-specific information on the health and safety standards for PPE, [contact the official contact points in each member state of the EU](#).

Read the CBI study [on buyer requirements](#) for an extensive overview of the legal, non-legal and niche requirements you will need to comply with as an exporter of workwear to Europe.

Read the CBI study [on organising your exports to Europe](#) for more elaborate tips on how to deal with

payment terms, storing, packaging and shipping.

Familiarise yourself with the [complete list of chemicals restricted under REACH](#).

Additional requirements

In Addition to non-legal, but mandatory requirements like standards and certifications, there are many services that buyers implicitly expect or at least highly appreciate if you want to do business with them.

Product design and development

The workwear market is not as sensitive to seasonal trends as fast fashion, but product design is still important for it. After all, workwear is often worn by employees that need to make a professional impression, representing the company values of their employers. Many European importers of workwear will sell their buyers up the value chain styles from stock, with the option to customise fabrics, striping, pockets, zippers and logos.

In addition to styling, product design and innovation are very important in the workwear market. Innovative designs, materials and production methods that make workwear perform better at use and maintenance can give you a serious competitive advantage.

Innovations that have recently found their way into the workwear market are include:

- [fabric made with cork waste](#)
- [heat and flame protection on breathable, stretch fabrics](#)
- [thread-based triboelectric nanogenerator \(TENG\)](#)

To ensure quality, and in some cases also environmentally friendly production methods, buyers may require you to source your base materials from a preferred supplier, such as:

- [Gore](#) for Gore-tex and Gore-tex Infinium
- [Teijin](#) for Twaron and Endumax

Communication

Smooth communication is an implicit requirement of all buyers. Always reply to every email within 24 hours. Even if it is just to confirm that you have received the email and will send a more complete reply later. If you have a problem with a production order, immediately notify the customer and try to offer a solution. Another good tip is to create a T&A (time and arrival) of every order and share it with your buyer. This file will help you to manage expectations, monitor progress and is the best guarantee of on-time delivery.

Flexibility

Many factories focus only on getting convenient orders: simple designs, large quantities and long delivery times. However, if you want to start a business relationship with a European buyer, be prepared to accept complicated orders first. Buyers will want to test your factory before giving you large, easy orders. Make sure at the start that a buyer will not continue to place only difficult orders with you and convenient orders elsewhere.

Expect a European buyer to require in their first order:

- high material quality and impeccable workmanship;
- order quantities below your normal minimum order quantity (MOQ);
- a price level that is lower than you normally would accept for small quantity orders.

Tips:

Not only promote your company to a new buyer, but promote the buyer within your company as well. Make sure your whole team seizes the opportunity and makes a big effort to service the new buyer in the best possible way.

Factor in extra lead time for the first order from your new buyer to get it 100% right the first time.

Be transparent about this with your buyer.

Niche requirements

The workwear market has many subcategories, each associated with workwear items that have very distinct characteristics, including workwear designed:

- for use in different hazardous environments;
- to protect different parts of the body, such as eyes, face, respiratory system, hands, feet, etc.;
- to protect against different risks, such as mechanical impact, cold, heat, rain and foul weather, liquid chemicals, fire and flames, electric shock, radiation, drowning and harmful noise.

Be aware that each type of PPE can have very distinct requirements concerning design, materials, production, packaging, use and maintenance. For a full overview of PPE subcategories check the [EU's harmonised norms and standards list for PPE](#).

Wearable technologies

Workwear companies are expected to implement wearable technologies into their collections to measure personal worker and environmental circumstances, so they can better react to unsafe situations, avoid injuries and improve performance.

Recycled materials

A popular trend among European workwear companies is to use recycled content in their designs. [Havep](#), for instance, sells aprons made with 20% pre- and post-consumer recycled cotton waste and 55% recycled PET. [Schijvens](#) even sells workwear T-shirts and polo shirts made with 50% pre- and post-consumer recycled cotton and 50% recycled PET. The company positions itself in the market as a circular workwear company.

Tips:

Always ask your buyer about the specific performance characteristics, legislation and standards your product needs to comply with. Confirm this information in writing and do an honest self-assessment of your capabilities before you confirm any order.

Read this [overview of European brands in different market segments experimenting with different recycled materials](#) by the European Clothing Action Plan.

Check the [Cradle to Cradle Certified Products Registry](#) for an overview of 50 innovative recycled fabrics.

Follow [Innovation in Textiles](#) for the latest updates on technical textiles in the workwear market.

2. Through what channels can you get workwear on the European market?

Before you start to approach European workwear buyers, you need to determine what market segment fits your company best and through what channels you want to sell your product.

How is the end market segmented?

Besides price level and the specific risks against which the workwear is intended to protect, the most significant segmentation concerns the employment position of end users. End consumers of workwear are either non-professional hobbyists, self-employed professionals or employees. This largely determines what requirements your buyer will have and the best channels for you to sell your product.

Table 1: Workwear market segmentation

Buyer type	B2C or B2B	Functionality	Price	Material use	Compliance level
DIY consumer	B2C (business to consumer)	Basic, functional styles	Price conscious	Low-medium quality materials	Little focus on compliance
Self-employed professional	B2C and B2B (business to business)	Focus on functionality, price, durability and safety	Price conscious	Good-quality materials	Little focus on compliance
Employee	B2B	Highly functional, durable and safe styles	Less focus on price	High-quality, fit-for-purpose materials	Strict compliance requirements regarding safety, corporate identity and sustainability

The DIY consumer

End consumers buy workwear to work their homes and hobbies in their spare time. The DIY market is one of Europe's biggest retail markets, dominated by companies such as [Hornbach](#) and [OBI](#). DIY is not only a popular pastime, many people in Europe cannot hire a professional to do jobs such as painting, carpentry or cobbling due to the generally high labour costs. The DIY market focuses mainly on functionality and price, not on compliance.

The self-employed professional

Self-employed professionals such as plumbers, electricians, carpenters and installation workers buy their workwear for their occupation and are free to choose the vendor. The SEWE market (self-employed without employees) is supplied by DIY shops and specialised workwear suppliers, such as [Cofra](#), [Mascot](#) and [Carhartt](#). self-employed people work by themselves with perhaps one or two colleagues or an on-the-job student in

training. SEWEs are usually very brand loyal and focus on functionality, price, durability and safety, not much on compliance.

The employee

If an employee is required to wear protective workwear or a uniform, it will be either issued by their employer or they must acquire it themselves according to certain specifications. The focus is on high-quality materials, durability and consistency in all aspects concerning the product. This includes its use and maintenance (design, logistics, information), customer service and compliance with health and safety regulations, sustainability and social standards. This market is catered by highly specialised workwear suppliers, such as [Havep](#), [Tricorp](#) and [Roots](#).

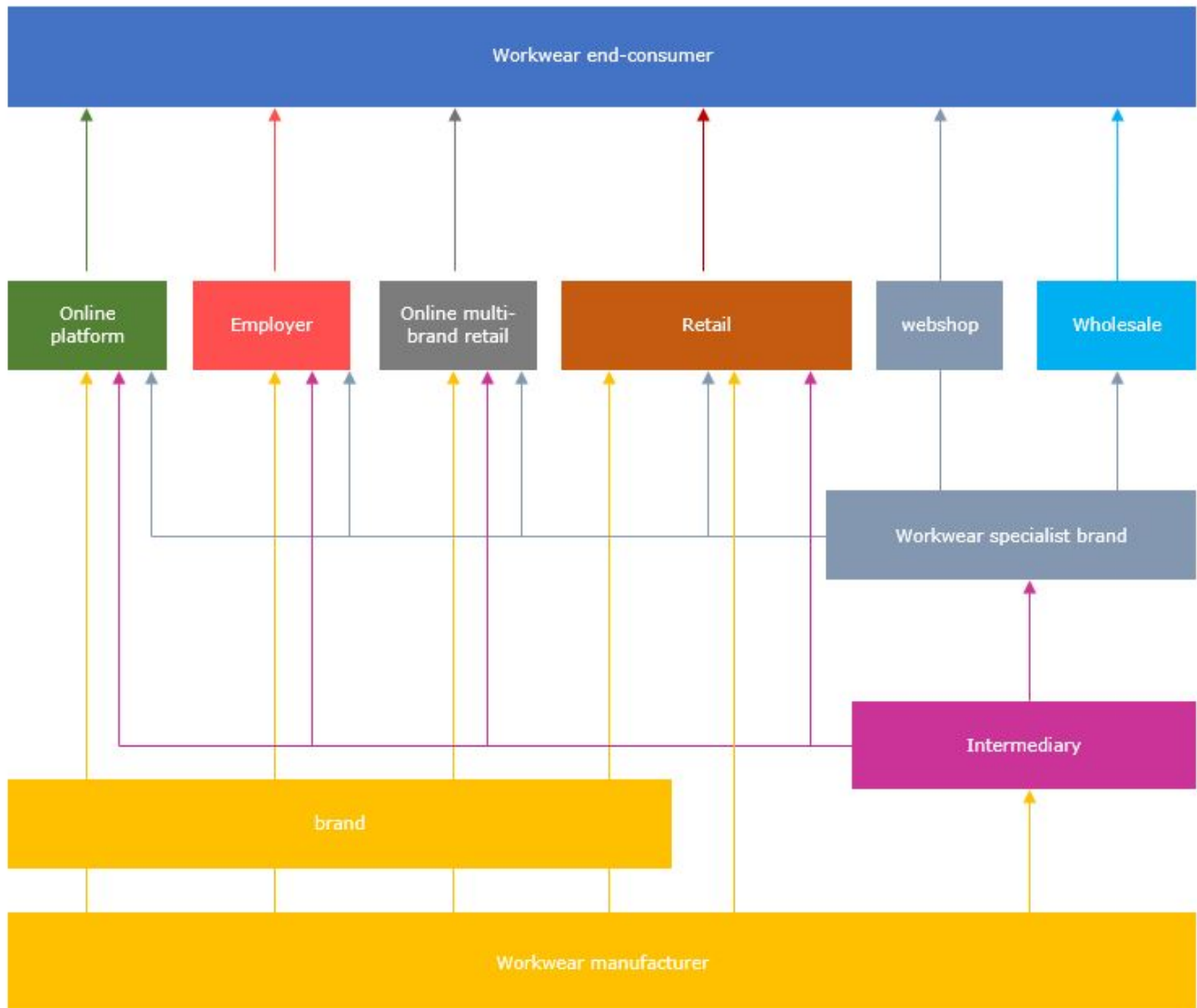
Through what channels does the product end up on the end market?

The most marked difference among your potential buyers is their place up the value chain, because that will determine how they do business with you. Within each part of the value chain, you will find buyers of different market size, with different requirements.

Each type of buyer requires a specific approach. Always try to find out in what part of the value chain your buyer operates, what challenges they face in the market and how you can contribute to their sales strategy.

- If you want to sell directly to European end consumers in the DIY market, try platforms such as [Alibaba](#), [Wish](#), [Amazon](#) and local platforms, such as [Bol.com](#), which targets the Netherlands and Belgium. They will let you advertise your product and handle your sales for a commission. Most online consumers can be found in countries in Europe's northwest. You will need to invest in a web shop, stock, order management and customer service. Your biggest challenge will be return policies.
- The shortest and perhaps most profitable route to selling to employees is via their employer. Your biggest obstacles however will be lack of awareness and reputation in the market, sales capacity and customer service. Compliance with health and safety rules and regulations is crucial. You will also need the capacity to design, sample and test products and you will need to keep stock for quick redelivery. If you want to target companies directly, try to contact their manager of indirect purchasing.
- If you want to sell directly to retailers, the biggest European names in protective workwear are [Groupe Adeo](#), [Kingfisher](#), [OBI](#) and [Bauhaus](#). Retailers sell to end consumers and SEWEs. They can place an order relatively easy as they only need one development sample for order confirmation. Order quantities are usually high, just as price pressure. Retailers focus heavily on compliance with health and safety regulations, sustainability and social responsibility standards.
- B2B workwear specialists such as [Mascot](#), [Arco](#), [HAVEP](#) or [COFRA](#) target SEWEs and employees. They will supply the design but highly appreciate product development and innovation. This group of buyers requires high-quality materials and workmanship. You will often need to keep stock of materials and trims possibly from preferred suppliers. Compliance with health and safety rules and regulations is crucial, with sustainability and social standards often required. Expect several sampling rounds.
- Intermediaries such as agents, traders, importers and private label companies can sell your product on to specialised retailers. They require high-quality materials, workmanship, compliance and flexibility and they are very price focused. Some are located near or in production countries and primarily do sourcing and logistics. Others work from Europe and also do market research, design and stock keeping. Their service level determines the commission rate they charge.

Figure 1: workwear market value chain



Tips:

Read the CBI study [on finding buyers](#) for an extensive overview of European apparel market segments, channels and requirements.

Do a thorough research of the market where your ideal buyer operates and adjust your proposition to their requirements and ambitions.

What is the most interesting channel for you?

If you are a small to medium-sized manufacturer in a developing country, intermediaries such as importers and private label companies, B2B workwear specialists and retailers are the most interesting channels for you. Always investigate your own unique selling points and determine what type of buyer best fits your capacities before you approach them.

Intermediaries

Agents, traders, importers and private label companies are the most adventurous type of buyers and are usually

the first to explore new sourcing destinations. By working with a trader, you will have access to many different buyers up the value chain and you can learn how to service them by following the trader's instructions. At the same time, you avoid the risk and investment associated with directly supplying to B2B workwear specialists or retailers.

You can find traders specialised in workwear by using an online search engine. Use keywords such as 'full service', 'workwear' plus 'solution'. Traders' websites usually show the buyers they are working with.

B2B workwear specialists

B2B workwear specialists sell high-quality, highly specialised workwear items at a relatively high price level. Check for example this waterproof workwear jacket by ROOTS, which [conforms to eight different ISO norms](#). Because of their high demands regarding product quality, innovation and flexibility, many B2B specialists are vertically integrated. To service this type of buyer you need strong capabilities in sourcing fabrics, finishes and trims, as well as in product development, thorough knowledge of rules and regulations and technical innovation.

Retail

If your company's strength is in producing large quantities of relatively low-tech workwear items with a low level of compliance to health and safety standards and standards for ethical production, large DIY retailers such as [Auchan](#) and [Hornbach](#) and the ones mentioned above are an interesting channel for you. Such companies sell low-tech workwear products, such as basic [overalls](#), [workpants](#) and [protective gloves](#) at relatively low retail prices. Expect large order quantities and relatively long lead times.

Tips:

Find potential buyers on the exhibitor list of the [A&A](#) fair for workwear in Germany, even if you don't plan to attend. If you do plan to meet a potential buyer at a fair, check what collections they have, buy one or two items and prepare matching or even improved samples. Work out the costing as well before you introduce your company and your samples to a potential buyer.

Check European workwear sector associations [PCIAW](#) and [Textile Services](#) for contacts and industry news.

3. What competition do you face on the European workwear market?

European brands dominate the workwear market in the EU. This is because services such as continuous stock and made-to-measure are in high demand in Europe and often only provided by European brands that are close to the market.

Which countries are you competing with?

China is the biggest exporter of workwear to Europe. Technical innovation, high efficiency, excellent customer service and the local availability of highly specialised fabrics and trims give Chinese manufacturers an advantage over competitors in developing countries. High MOQs, relatively long lead times, rising labour costs and not being part of the [Generalised Scheme of Preferences](#) (GSP) that removes import duties to the EU, all work against Chinese exporters.

Tunisia's biggest competitive advantage is its geographic location close to Europe, which results in very short lead times. Tunisian producers are experienced in producing trousers and denim, but nowadays they produce a

variety of high-quality tops in small quantities, including workwear. Tunisia's biggest challenge is competing on cost due to relatively high wages, inflation and a small working population.

Bangladeshi producers specialise in making relatively cheap basic apparel of fair quality, including relatively low-tech workwear. Efficiency is high and the country benefits from low production labour costs and the GSP. The biggest challenge for Bangladesh will be to increase technical expertise, facilitate smaller orders and to get more factories to comply with international safety and sustainability standards.

Vietnam has a long history in apparel making, including basic, good-quality workwear at competitive prices. The country benefits from the GSP. Vietnamese producers' challenges include high MOQs, limited availability of local fabrics and trims, and a lack of capacity in general, especially in the factories that operate in the north and south of the country. This scenario has caused wages to rise, further discouraging foreign investors already looking to expand into other countries.

Morocco has the same geographic advantage as Tunisia but with slightly lower wages and a population that is three times larger. Morocco has a long manufacturing history and has producers which are very experienced in manufacturing high-quality products. Due to its proximity to Europe and the large local francophone community, the most important foreign companies producing in Morocco come from Spain and France.

Pakistan has a long apparel manufacturing history. Thanks to the availability of high-quality leather, Pakistan has specialised in items such as gloves and protective wear. Motorbike collections with special protection are often manufactured in Pakistan. The country benefits from [GSP+](#). Safety concerns, however, sometimes do not allow Europeans to visit the country, which works against Pakistan's industry.

Tips:

Check how other countries benefit from the Generalised Scheme of Preferences on [the European Commission's website on international trade](#).

Study the countries where your competitors are located. Compare their strengths and weaknesses to yours and advertise the competitive advantages of doing business with you. Besides GSP, consider factors such as distance to Europe, [ease of doing business](#) and [transparency](#).

Most online search engines will let you create a news alert on a topic. This way you can automatically follow the latest developments in the apparel industry in a specific country.

Which companies are you competing with?

[Kinglong Workwear](#) is a Chinese manufacturer of workwear and safety garments for the US and European markets. The company offers a large selection of SGS-certified, CE-compliant top items, such as coveralls, high-visibility workwear, jackets, pants and safety vests. Kinglong is Oeko-Tex 100 and ISO9000 certified. The company tries to engage with potential buyers by regularly publishing workwear-related [blog posts and updates](#) on their website and social media.

Many producers in Tunisia have foreign owners or are in joint ventures with a foreign company. [Wearwell](#) is a successful example of a foreign-owned producer in Tunisia. Their setup in the UK has a sales and marketing focus to build turnover and service buyers. This type of arrangement adds value, especially regarding the production and sale of complicated workwear styles.

[Cutting Edge](#) in Bangladesh is an example of a fashion apparel manufacturer that has expanded its product range to relatively low-tech workwear uniforms. The company currently sells to buyers in the US ([Cintas](#)

uniforms, for example) and Europe. Cutting Edge stresses its compliance with local labour and safety laws and is BSCI and SEDEX certified.

Tips:

Check the [exhibitor list of the A+A workwear trade fair](#) for an overview of workwear manufacturers worldwide. You can search the attendees by country and check how they promote their company and products on their website for inspiration.

Study your competitors and try to understand why European buyers are interested in placing orders with them. Understanding your competitors will help you to diversify and improve your USPs.

Read the CBI study [Tips for Doing Business with European Buyers](#) to learn how to approach and engage with buyers. This report also describes how you can get practical help with understanding European business culture, analysing your USPs and doing business with European buyers.

Which products are you competing with?

Cheap fast fashion poses a threat to low-tech, basic workwear because it makes durability less relevant. With basic T-shirts on sale anywhere in Europe for less than €5 (often conveniently packed in quantities of 5, 7 or 12) and trousers for less than €10, it is possible for both professionals and hobbyists to replace basic workwear items with disposable casualwear. Competition in the cheap fashion market however is very strong, so it is not a good market opportunity. This does not apply to uniforms because this product category is based on very specific designs.

An upcoming trend in the European workwear market points towards durable workwear items which can be repaired or recycled. Workwear brands increasingly offer leasing package deals that include repair, replacement and regular cleaning of workwear. This way of doing business creates secured revenue for the supplier and reliability of quality for the buyer. Check for instance the [workwear rental service by CWS](#).

Tips:

Look beyond manufacturing products. Keeping stock and increasing your service level by adding cleaning, repairs and leasing arrangements, which may enable you to grow your business.

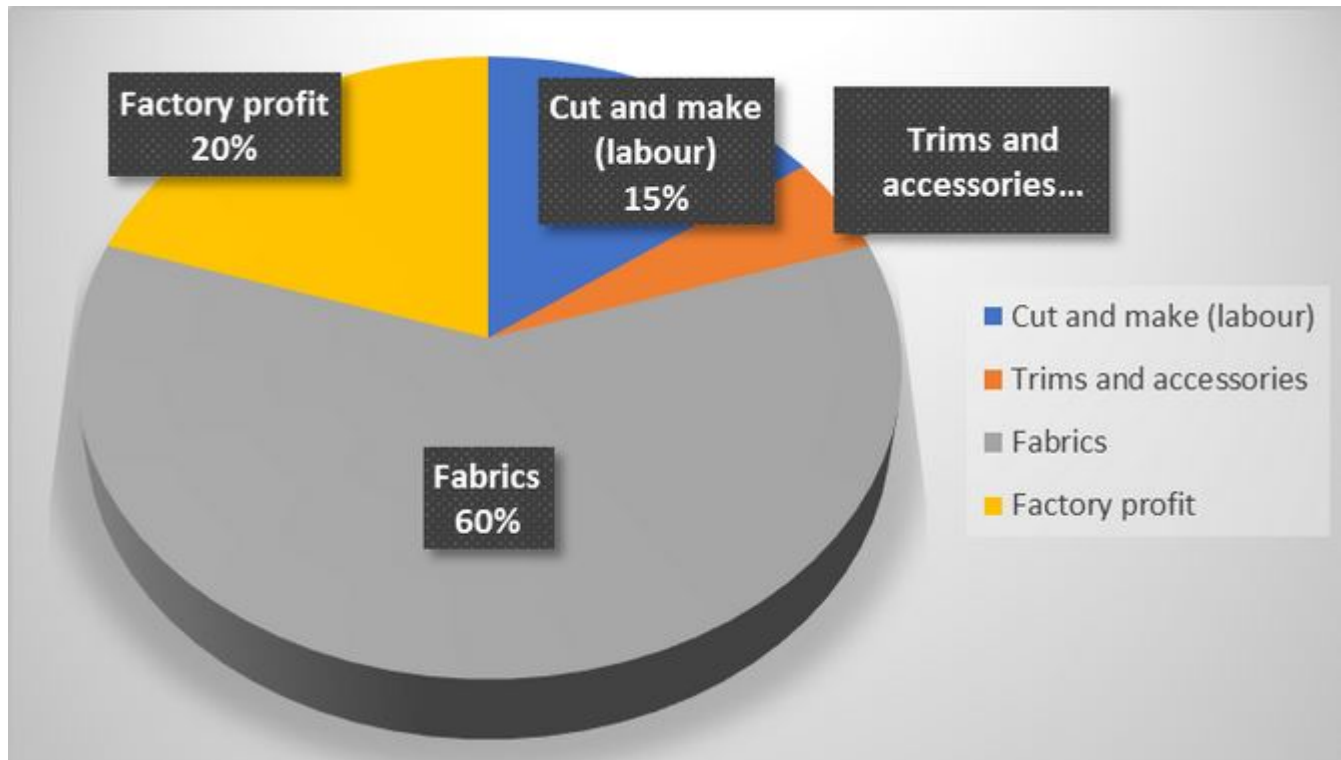
Consider opening a local office in your target market, perhaps in a joint effort with other producers in your country. The high service level required in the European market demands local support.

4. What are the prices for workwear on the European market?

The factory price of your product, which in the fashion industry jargon is your FOB price (for [free on board](#)), is influenced by many factors, including the cost of materials, the efficiency of your employees, your overhead and profit margin.

The following chart shows the average cost breakdown of a typical FOB price:

Chart 1: Breakdown of a typical FOB price



Note that these percentages may vary per factory and per order. Some factories accept lower profit margins when order volumes are high. In addition, the percentages for labour versus fabrics may vary, depending on the efficiency and wage level of the workforce and the price of the materials. In the workwear industry specifically, safety compliant materials are relatively expensive. Efficiency goes up and material prices go down when producing large volume orders.

Wholesale and retail pricing

Specialised B2B workwear brands and B2C retailers sell workwear at a markup of between 4 and 8 times the FOB price. Exceptions do exist. In the budget market, some large European retail chains may sell for a markup of only twice the FOB price. The FOB price is marked up because buyers need to account for import duties, transport, rent, marketing, overhead, stock keeping, returns, markdowns, VAT (15%–27% in EU countries), among other costs.

According to [Eurostat's 2018 comparison of retail prices for apparel](#), France has the highest price level among the top six apparel and footwear importer countries at 109.9 points compared to the European average of 100, followed by Belgium (106.4), the Netherlands (106.3), Italy (101.1), Germany (99.1) and the UK (92.7).

This study has been carried out on behalf of CBI by [FT Journalistiek](#).

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