What is the demand for apparel in the European market?

Europe is a strong, continuously growing apparel market, home to some of the world’s biggest and most renowned apparel companies. Europe’s apparel import market was valued at €168.5 billion in 2018, growing at an average rate of 5.8% a year. The biggest markets within the EU include Germany, France, the UK, Spain, the Netherlands and Italy, together comprising nearly 72% of all EU apparel imports. Poland is a market to watch due to recent high growth in imports and for being a sizeable market already. Knitwear is the biggest product segment in Europe but the fastest growing and most attractive product categories currently are fashion and active sportswear.

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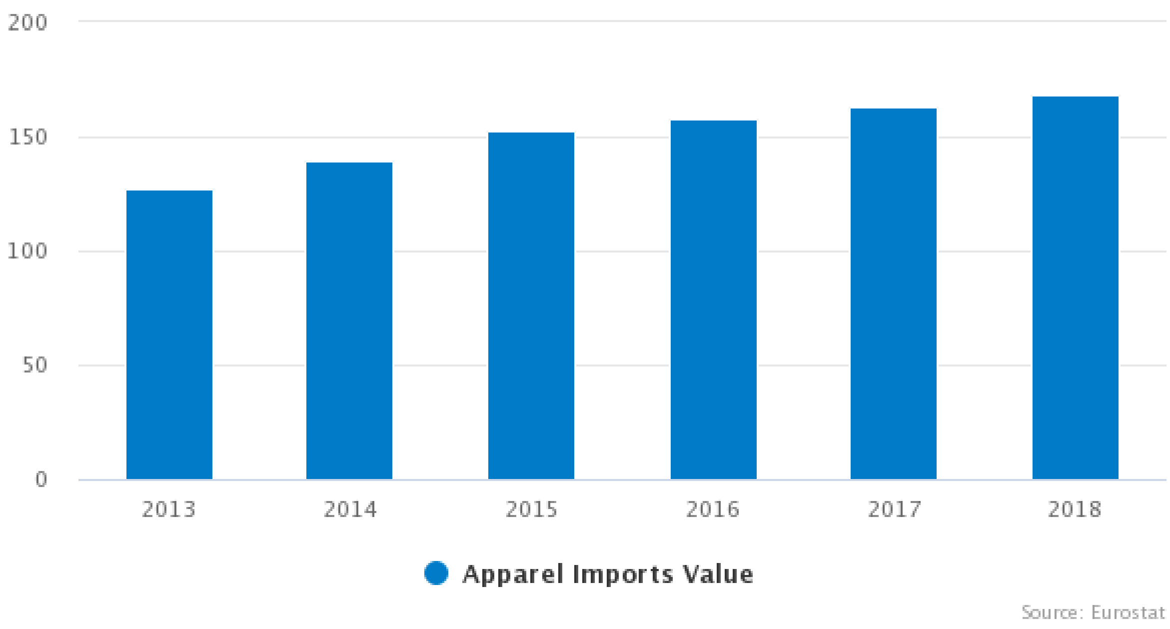
1 . What makes Europe an interesting market for apparel?

Home to some of the world’s biggest and most renowned apparel companies, Europe has a large and well-performing apparel sector. According to the World Trade Organization, the EU is the world’s largest importer of apparel and textiles, accounting for 23.1% of the world’s apparel and textile imports value in 2018. Based on Eurostat statistics, the overall European apparel import market was valued at €168.5 billion in 2018, up from €127.2 billion in 2013. This corresponds to roughly 33.9 billion units of clothing in 2018, up from 28.4 billion in 2013. In the last five years, EU apparel import value has been growing on average by 5.8% annually, showing a continuously strong demand for apparel.

Figure 1: European Union apparel imports

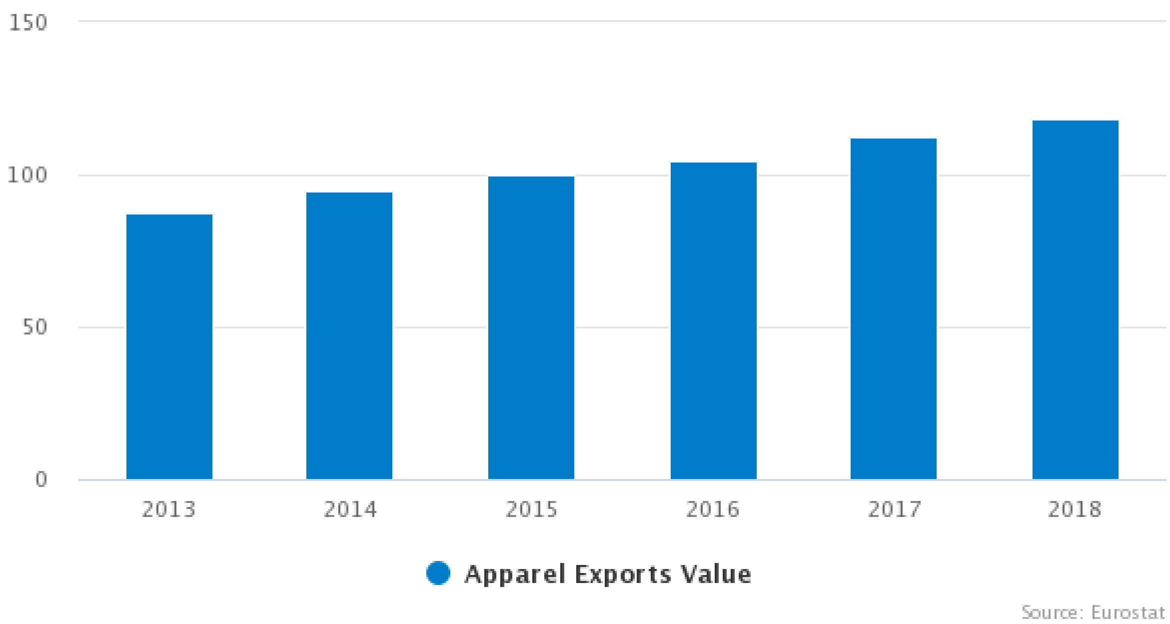
in € billion



The EU is also a large re-exporter of apparel. A large share of apparel imports from countries inside the EU are re-exports of apparel made in developing countries. In 2018, the EU ranked second behind China in textile exports, accounting for 23.5% of the world's export value. In 2018, it exported €118.7 billion worth of apparel up from €87.7 in 2013. A share of 76.5% of this value was exported to other countries in the EU and 23.5% to the rest of the world. EU apparel exports grew at an average annual rate of 6.2% between 2013 and 2018. The biggest EU exporters in 2018 were Italy (€20.8 billion), Germany (€20.2 billion), Spain (€12.9 billion), France (€10.9 billion), the Netherlands (€10.4 billion) and Belgium (€8 billion). Together, these six countries represent 70% of EU's apparel exports. Within this group, the Netherlands, Spain and Germany have had the strongest export growth in the 2013–2018 period at an average 8% a year in value. Poland is currently the eighth largest apparel exporter in the EU, its apparel exports grew at an average 14.2% in value each year in the 2013–2018 period. Staying at this pace, Poland will grow to be the sixth largest apparel exporter in the EU within five years.

Figure 2: European Union apparel exports

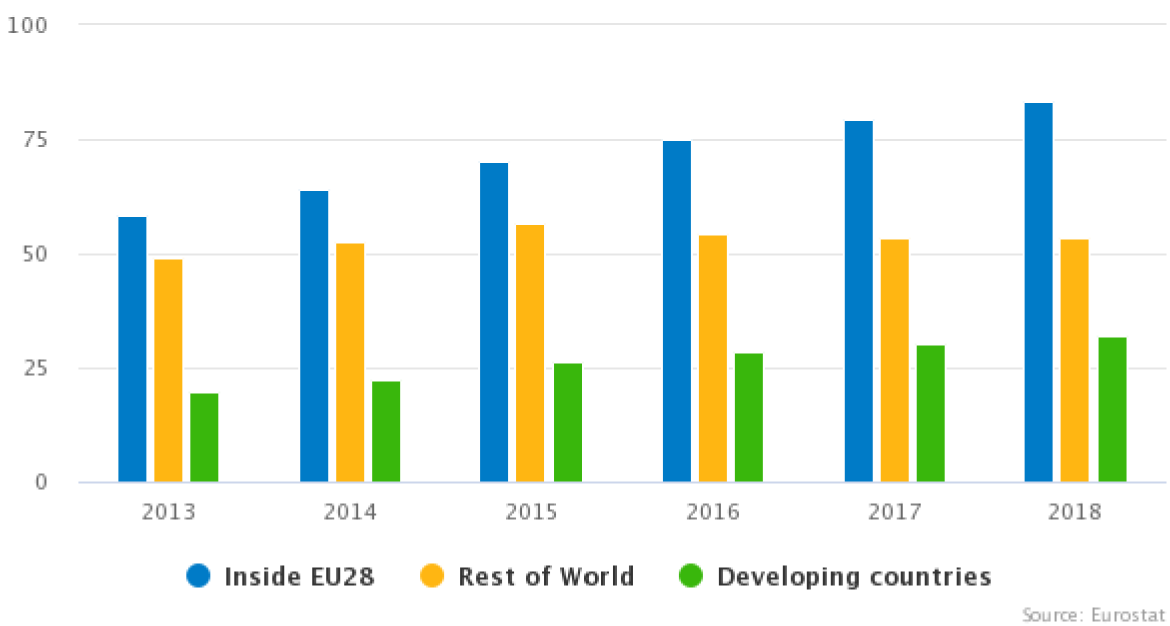
in € billion



The current value of EU apparel imports is almost evenly split between apparel originating from inside and outside the EU, respectively at 50.5% and 49.5%. In 2018, developing country suppliers contributed 18.9% to all clothing imports into the EU in terms of value, up from 15.4% in 2013. Suppliers from the rest of the world accounted for 31.6% of the EU apparel import value in 2018, down from 38.6% in 2013. The value of EU apparel imports originating in developing countries corresponded to €31.8 billion in 2018, growing at an average annual rate of 10.2% since 2013, which is much higher than the EU's overall apparel import rate. This indicates a growing demand for apparel from the developing countries.

Figure 3: European Union apparel imports by origin

in € billion



Asian countries dominate Europe's apparel imports originating outside the EU. The top three of these exporters, China, Bangladesh and Turkey, together account for 31.4% of all apparel imports into the EU. China is the single largest apparel exporter to the EU with 16% of the EU import value in 2018, followed by Bangladesh (9.6%) and Turkey (5.8%). Other top 10 exporters from outside the EU have import shares between 1% and 3% of the overall value. Bangladesh, Cambodia, Vietnam, Pakistan, Tunisia and Myanmar have each increased their shares of EU apparel imports between 2013 and 2018, thanks to above-average growth. Among these, Myanmar has grown the fastest, the value of its apparel exports to the EU growing at a 66.4% annual average from €131 million in 2013 to €1.7 billion in 2018. Other strong growers include Cambodia, Vietnam, Pakistan and Bangladesh.

Table 1: Top 10 extra-EU and intra-EU exporters to EU 2018, value in € billion; average annual growth

Country	Value	5-yr. growth
Top extra-EU exporters		
China	€26.9	↓-0.1%
Bangladesh	€16.2	↑10.6%
Turkey	€9.8	↑2.0%
India	€5.3	↑2.7%
Cambodia	€3.9	↑17.2%
Vietnam	€3.4	↑12.8%
Pakistan	€3.0	↑12.1%
Morocco	€2.7	↑5.4%
Tunisia	€2.1	↓-0.01%
Myanmar	€1.7	↑66.4%
Top intra-EU exporters		
Germany	€17.6	↑11.3%
Italy	€10.2	↑5.2%
The Netherlands	€8.8	↑9.7%
Spain	€8.0	↑10.2%

France	€6.6	↑6.9%
Belgium	€6.0	↑4.7%
Poland	€4.8	↑13.2%
United Kingdom	€4.6	↑7.3%
Denmark	€2.9	↑6.1%
Romania	€2.2	↓-0.8%

Source: Eurostat

Bangladesh was the only country from the top four apparel exporters to the EU which grew strongly during the 2013–2018 period. China registered a year-on-year decline of -0.14%, while Turkey and India grew below the EU market average at 2% and 2.7% respectively. The market share of these three countries reduced, especially China, whose share of all apparel exports to the EU dropped by -5.3%. These dynamics show growing opportunities for suppliers from other developing countries to increase their apparel exports to the EU, especially since the trend of apparel production moving away from China is expected to continue in the years to come.

Production in China is growing more expensive due to labour force shortages and the trade war with the United States. The Chinese government has also introduced new environmental standards which are predicted to force more than 80,000 Chinese factories to shut down. The decline in Chinese exports is affecting the global supply chains for many apparel manufacturers, which are increasingly shifting their businesses to countries such as Myanmar, Cambodia, Vietnam, Pakistan and Bangladesh. Although China remains as one of the largest suppliers of fabrics, accessories, trims and high-value apparel, its fast fashion volume business is expected to move to other developing country suppliers.

Intra-EU apparel imports are dominated by Germany and Italy, which accounted for 16.5% of all EU apparel import value in 2018. They are followed by the Netherlands with 5.2%, Spain with 4.7% and France with 3.9%. Germany, the Netherlands, Spain, France, Poland, and the UK have each increased their shares of EU apparel imports between 2013 and 2018, thanks to above-average growth. Poland's intra-EU apparel exports have grown the fastest in the 2013–2018 period, at an average 13.2% in value per year, from €2.6 billion in 2013 to €4.8 billion in 2018. Other strong growers include Germany, Spain and the Netherlands.

2 . Which European markets offer most opportunities for apparel exporters?

Western European apparel markets are much larger and better developed than Central and Eastern European markets. The top apparel import markets in the EU are Germany, France, the UK, Spain and the Netherlands. While Eastern European markets are growing at much higher rates than those in Western Europe, they are still comparatively small. Poland is a market to watch because its imports from developing countries are growing fast and for being a sizeable market already.

Table 2: Top 10 EU importers of apparel, 2018 in value €; average annual growth

Country	Value	5-yr. growth

Germany	€33.9	↑5.1%
France	€21.7	↑4.3%
United Kingdom	€19.6	↑3.4%
Spain	€16.6	↑8.3%
Netherlands	€14.7	↑7.5%
Italy	€14.5	↑4.7%
Belgium	€7.9	↑2.9%
Poland	€7.0	↑18.4%
Austria	€5.9	↑6.2%
Sweden	€4.1	↑4.1%

Source: Eurostat

Germany's €33.9 billion in apparel imports made it the largest such importer in the EU in 2018, followed by France, the United Kingdom, Spain, the Netherlands and Italy. Together, these six countries account for nearly 72% of all EU apparel imports. In the last five years, Spain was the fastest grower within this group, growing its apparel imports each year on average by 8.3%. The Netherlands followed growing an average 7.5% per year, while Germany grew 5.1%.

The fastest growing EU markets for apparel imports include Poland, Croatia, Hungary and Romania, each growing on average between 14.9% and 18.6%. Despite the fast growth, these four countries together account for only 6.7% of the EU apparel import market. The most interesting country in this group is Poland, which by itself accounts for 4.1% of all EU apparel imports, making it the eighth largest importer of apparel in the EU. Sustaining the same growth rate this year, Poland will overcome Belgium as the seventh largest apparel importer in Europe in 2019. Poland is a market to watch for developing country exporters.

The primary apparel exporter to the top six EU apparel markets is China, whose import market share ranges from 14.9% in Germany to 22.2% in the Netherlands. China’s share has reduced in the last five years in all six top export markets. Other significant apparel exporters to Europe include Bangladesh, Turkey and Germany. While Bangladesh and Germany have been picking up market share in the last five years, Turkey, much like China, has seen an overall decline in its market share of imports into the top six markets.

Table 3: Top EU apparel importers 2018, value in € billion, volume in billion units, five-year average value growth, major exporters and import dynamics by country

	Germany	France	United Kingdom

2018 import value	€33.9	€21.7	€19.6
5-yr. value growth	↑ 5.1%	↑ 4.3%	↑ 3.4%
2018 import volume	6.5	3.6	2.5
5-yr. volume growth	↑ 3.3%	↑ 2.5%	↓ -1.5%
Major exporters % share of exports	China (14.9%) Bangladesh (11.1%) Netherlands (9.3%) Poland (8.4%) Turkey (7.2%)	China (15.6%) Belgium (11.0%) Germany (9.7%) Italy (9.4%) Spain (7.4%)	China (19.5%) Bangladesh (12.5%) Italy (7.1%) Turkey (7.1%) Germany (5.7%)
Import dynamics	• Intra-EU imports grew at a much higher five-year rate (9%) than Extra-EU imports (2.1%); • In the last five years, China's share decreased from 24% to 15%; • Poland and Bangladesh increased their shares of imports significantly.	• Intra-EU imports grew at a higher rate than extra-EU, 5.0% and 3.5% respectively; • In five years, China's share of imports decreased by 5.5%. Belgium and Italy also decreased; • The Netherlands, Vietnam and Bangladesh grew their shares.	• Intra-EU imports grew by 8.1% compared to 1% growth for extra-EU imports; • China lost 7.6% in market share in the last five years. Turkey and India have also declined; • Bangladesh, the Netherlands and Germany grew their market shares.
Important market players	Leading brands: Hugo Boss, Adidas, Escada, Tom Tailor, Jil Sander, Joop!. PUMA Leading retailers: Zalando, C&A, H&M, Peek & Cloppenburg, KiK, New Yorker, Takko, s.Oliver	Leading brands: Louis Vuitton, Chanel, Dior, Givenchy, Yves Saint Laurent, Balenciaga, Hermès, Balmain, Lacoste Leading retailers: Amazon, Decathlon, Galeries Lafayette, Kiabi, La Halle, Camaieu, C&A, H&M	Leading brands: Alexander McQueen, Burberry, Stella McCartney, Temperley London, Vivienne Westwood Leading retailers: ASOS, Marks&Spencer, Next, Primark, Arcadia, Debenhams, New Look, TKMaxx, H&M
	Spain	Netherlands	Italy
2018 import value	€16.6	€14.7	€14.5
5-yr. value growth	↑ 8.3%	↑ 7.5%	↑ 4.7%

2018 import volume	3,1	3,2	2,5
5-yr. volume growth	↑ 4.2%	↑ 5.0%	↑ 3.2%
Top Exporters (% share of exports)	China (16.5%) Bangladesh (13.8%) Turkey (13.5%) Morocco (10.0%) France (6.2%)	China (22.2%) Germany (17.6%) Bangladesh (13.3%) Turkey (6.4%) India (4.0%)	China (16.9%) France (10.6%) Bangladesh (9.0%) Spain (7.2%) Romania (5.3%)
Import dynamics	• Extra-EU imports grew at a five-year rate of 10.7%, while intra-EU imports grew at 3.3%; • Imports from China, Portugal and Italy decreased over five years; • Imports from Bangladesh, Turkey, Cambodia, Pakistan, Myanmar and Morocco grew during the same time.	• Intra-EU imports grew more than extra-EU imports at an average annual growth rate of 11% versus 5.6%; • Imports from China, Turkey, Poland and Bangladesh dropped in the last five years; • Imports from Germany, Myanmar and Vietnam grew during the same time.	• Intra-EU imports grew more than extra-EU imports at an average annual growth of 6.3% versus 3.5%; • China lost 6.2% of market share. Romania Turkey and Tunisia also observed declines; • France and Bangladesh grew their market share by 2.9% and 2.3%.
Important market players	Leading brands: LOEWE, DELPOZO, Adolfo Dominguez, Desigual, Bimba y Lola, Uterqüe Leading retailers: El Corte Ingles Group, Mango, Tendam, Stradivarius, Bershka, Massimo Dutti, Pull and Bear, Oysho	Leading brands: Scotch & Soda, Laundry Industry, Mexx, Viktor & Rolf Leading retailers: G Star, WE, C&A, H&M, Zalando	Leading brands: Armani, Prada, Zegna, Dolce & Gabbana, Valentino, Salvatore Ferragamo, Versace, Gucci Leading retailers: Yoox, Benetton, Calzedonia, H&M, Max Mara, Teddy, Rinascente

Source: M-Brain analysis based on Eurostat data

Private consumption expenditure is an important indicator of the European apparel market, a sector closely linked to economic conditions. When money is tight, consumers postpone buying nonessential items until they have more disposable income. European private consumption expenditure increased in 2017 and 2018. This trend is expected to continue in 2019, which means that apparel consumption overall and consumption of high-value apparel is likely to rise in the next three to five years. According to Eurostat, Estonia had the highest share of household expenditure spent on clothing and footwear in 2016 in Europe (7%), followed by Italy and Portugal (6%), while Bulgaria (3%), Hungary and the Czech Republic (4%) had the lowest.

The United Kingdom, the third largest European importer of apparel and third largest European export market for developing country suppliers is scheduled to leave the EU by October 2019, but the entire Brexit process is creating a lot of economic and political uncertainty. It is currently uncertain whether the UK will continue to provide preferential trade conditions for developing countries and how its exit from the EU will affect the apparel sector.

Table 4: Top 10 EU importers from developing countries, 2018 value in € billion; average annual growth

Country	Value of Developing country imports	5-yr. growth	Developing country share of imports
Germany	€6.72	↑9.7%	19.8%
Spain	€5.72	↑16.1%	34.4%
United Kingdom	€4.42	↑7.0%	22.5%
France	€3.69	↑7.0%	17.0%
Netherlands	€3.33	↑7.8%	22.6%
Italy	€2.71	↑7.9%	18.7%
Belgium	€1.59	↑6.0%	20.2%
Denmark	€0.87	↑20.1%	21.5%
Poland	€0.79	↑39.5%	11.3%
Sweden	€0.64	↑11.6%	15.8%

Source: Eurostat

Developing countries contributed significant shares to the imports into all top six EU apparel markets, ranging from 17% in France to 34.4% in Spain. Germany, Spain, United Kingdom, France, the Netherlands and Italy together account for 84% of apparel imports from developing countries. In terms of value, Germany remains the single largest apparel importer from the developing countries. Spain had the strongest growth in the last five years, increasing the share of developing country imports it receives by 10%.

The overall growth trends for the top six markets show that export opportunities for developing country suppliers are growing. Poland had the strongest average annual growth in imports from developing countries at 39.5%, followed by Austria (26.2%) and Denmark (20.1%). Of particular interest, Poland is slowly becoming an European apparel hub, ranking among the 10 fastest growing EU apparel markets in overall imports and imports from developing countries. Poland's largest clothing manufacturer is LPP , which controls the Reserved, Cropp, House, Mohito and Sinsay brands.

Developing country apparel imports into other Eastern European markets, such as Romania, Hungary, Lithuania, Bulgaria and Estonia, are also growing at very high annual growth rates, but these markets are still very small in comparison to the top EU markets. Their relatively low base explains their strong growth rates. Apparel imports from developing countries was at or below €10 million in most of these countries in 2018, except for Romania, which imported €82 million in apparel from developing countries. These countries do not currently constitute highly advantageous markets for developing country suppliers, but should be observed for future opportunities. Some emerging brands from Eastern Europe include Dzhus, RCR Khomenko, Anna K, The Knotty Ones, Nehera.

Table 5: Average unit prices of intra and extra-EU imports at top 6 EU importers, 2018 value in €; Five-year change

Country	Average unit price of intra-EU imports	5-yr. change	Average unit price of extra-EU imports	5-yr. change
Germany	€8,61	+€1,14	€3,82	-€0,04
Spain	€8,01	+€1,38	€4,75	+€1,01
United Kingdom	€14,74	+€5,21	€3,96	+€0,49
France	€7,31	+€0,55	€4,92	+€0,37
Netherlands	€9,00	-€0,01	€3,49	+€0,28
Italy	€9,23	+€1,80	€4,43	-€0,08

Source: Eurostat

Prices of clothing and footwear vary considerably across EU Member States. Scandinavian countries have the highest prices, while Eastern European countries have the lowest. According to Eurostat, Sweden had the highest prices for clothing and footwear in 2016 (36% higher than the EU average), followed by Denmark (33%) and Finland (24%). Bulgaria was the least expensive country for clothing and footwear (21% lower than the EU average), followed by Hungary (15%) and Poland (12%).

Average unit prices of imported apparel vary among the top markets based on origin. Apparel imported from other European countries is typically 1.5 to 2.6 times more expensive per unit than apparel imported from outside the EU. France has the highest average unit prices for extra-EU imports at €4,92, while the Netherlands has the lowest at €3,49. More specifically for developing country imports, average unit prices have declined in Germany and Italy in the last five years, whereas in other top EU import markets theses prices grew. Spain had the highest price growth for apparel imports from developing countries in the last five years.

Tips:

- Focus your export efforts on the top six markets: Germany, France, the United Kingdom, Spain, the Netherlands and Italy. 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 non-EU suppliers. France and Spain may be particularly interesting since they have 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 it may affect free trade agreements and whether your product may be subject to new tariffs or other procedural export difficulties. Visit the British government's website Get ready for Brexit for more information on Brexit and its effects on your business.
- Consider exporting to Poland, Europe's fastest growing importer of apparel in general, as

well apparel from developing countries.

- Do not invest in exporting to other emerging EU markets, such as Romania, Hungary, Lithuania, Bulgaria and Estonia. These markets are currently too small but may offer opportunities in the long term. Monitor them for possible future cooperation.
- Focus on subcontracting for big brands and retailers. Look into cooperating with fashion retailers and manufacturers that are successful in one or more European countries, such as H&M and BESTSELLER. Typically, contracts for garment subcontracting are entered into with their main offices. Have your marketing or sales department reach out to major brands for potential subcontracting opportunities.
- Try to seize the opportunities made by the growing cost of producing in China. Prepare a competing offer for mass production and start developing your capacities in high-value items and accessories to provide a cheaper and reliable alternative to Chinese production.

3 . Which products from developing countries have the most potential in the European apparel market?

At €20.3 billion in value, knitwear is the largest apparel product category imported into the EU, accounting for 12.1% of all apparel imports. It is followed by pants, bodywear, fashion sportswear and T-shirts, which together account for 45.7% of all apparel imports to the EU. Active sportswear, fashion sportswear, swimwear and dresses are the fastest growing product categories by import value. In the last five years, active sportswear import value grew on average by 13.8% each year, while the other top categories each grew between 8.3% and 9.6% per year. Sportswear growth is driven by its functionality and the growing inclination of Europeans to participate in sports for health reasons. These trends indicate continued strong growth for sportswear in the next three to five years. Between 2013 and 2018, all the other product categories grew at below average annual rates for apparel imports, although most had decent growth performance at between 4.3% and 5.8%. Suits and ensembles were the only product category whose imports declined in that period, dropping on average by 0.9% each year.

Table 6: EU apparel import value by product category, 2018 in € billion; average annual growth

Product Category	Value	5-yr. growth
Knitwear	€20.3	↑5.2%
Pants, trousers and shorts	€15.1	↑4.4%
Bodywear	€14.5	↑4.4%
Fashion sportswear	€14.4	↑9.6%
T-shirts	€12.6	↑4.7%
Coats, jackets, blazers	€10.3	↑5.8%
Dresses	€10.1	↑8.3%

Denim	€9.1	↑5.1%
Women's tops, blouses, shirts	€7.9	↑4.3%
Men's shirts	€7.3	↑2.3%
Babywear and children's wear	€4.0	↑5.3%
Active sportswear	€3.2	↑13.8%
Leather	€2.9	↑0.8%
Skirts	€2.1	↑4.8%
Swimwear	€2.0	↑8.4%
Suits and ensembles	€1.5	↓-0.9%
Other product categories	€34.1	↑9.3%
TOTAL	€168.5	↑5.8%

Source: Eurostat

The sustainable apparel category, also known as eco-fashion, is not listed on the table above, but is growing steadily in the EU. This category includes apparel products designed, created and produced ethically and responsibly, with consideration for the environmental and social impacts they cause throughout their production and life span. Europe, in particular Northern Europe, remains one of the most interesting markets in the world for sustainable apparel exports. Sustainability awareness and initiatives in Europe are growing at multiple levels at once among consumers, manufacturers, retailers, governments and non-governmental organisations. There is no specific trade or production data for sustainable apparel available because sustainability applies to all product categories and is currently not tracked in terms of value or volume. It is estimated however that one in three consumers in Europe's largest markets considers sustainability when shopping for apparel. Despite increased demand for sustainable apparel, European consumers are not always willing to pay more for this product category, although this is slowly changing. There are also regulatory initiatives at national and European level promoting sustainability, including the Dutch Agreement on Sustainable Garment and Textile. On the supply side, the number of sustainable brands is growing and all the leading labels and retailers are implementing various sustainability strategies and measures. For more information on sustainable apparel, visit the CBI's trends analysis, CBI buyer requirements and CBI's sustainable apparel product factsheet.

Other product categories emerging in the EU include wearable technology and smart clothing. These categories comprise technology products that can be worn on the body, either as an accessory or as part of the material used in clothing. Examples of wearable technology include fitness tracking bands, such as Fitbit, Runtastic, Mio and Misfit; smart sports bras; smart watches, such as Apple Watch; smart glasses, such as Google Glass and Sony's SmartEyeGlass; wearables for pets and outerwear, such as jackets with built-in LEDs. According to TMR, Europe's wearable technology market was estimated to grow at an average rate of 42.1% per year between 2014 and

2019. Its 2019 estimated value is €2.3 billion. While the smart clothing segment is not growing very fast in Europe yet, due to popularity, some analysts believe that smart clothing is a promising future market.

Table 7: EU apparel import value from developing countries by product category, 2018 in € billion, annual average growth

Product Category	Value	5-yr. growth
Knitwear	€4.3	↑9.9%
Pants, trousers and shorts	€4.3	↑6.6%
T-shirts (men's and women's)	€3.5	↑6.0%
Denim	€3.0	↑9.0%
Fashion sportswear	€2.2	↑21.0%
Men's shirts	€2.0	↑5.4%
Bodywear	€1.9	↑12.7%
Women's tops, blouses, shirts	€1.2	↑7.9%
Dresses	€1.2	↑13.1%
Coats, jackets, blazers	€1.1	↑16.9%
Babywear and children's wear	€0.86	↑12.3%
Leather	€0.34	↓-0.3%
Skirts	€0.31	↑9.6%
Swimwear	€0.26	↑10.8%
Active sportswear	€0.26	↑17.5%
Suits and ensembles	€0.13	↑7.5%
Other product categories	€4.9	↑15.6%
TOTAL	€31.9	↑10.2%

Source: Eurostat

Knitwear, pants, trousers and shorts, T-shirts, denim and fashion sportswear are the product categories most exported by developing countries to the EU. Together they account for a value of €17.3 billion equal to 54.4% of all developing country apparel exports to the EU.

The fastest growing product category exports from developing countries include fashion sportswear, active sportswear and coats, jackets and blazers. In the last five years, fashion sportswear exports from developing countries have grown on average 21% each year, driven by the growing demand for this category in the EU. Developing countries have in past years specialised in the production of denim, pants, trousers and shorts, T-shirt and men's shirts. Developing country exports currently account for 27.5% to 32.6% of all imports in these categories. Other categories where developing country exporters are growing their shares include knitwear, bodywear, and coats, jackets and blazers. All of these markets continue to be very interesting for developing country exporters due to their size and fast growth. Taking into account the import growth rate of fashion sportswear and active sportswear, these two segments still stand as unused opportunities. Developing country exporters currently hold just 15% and 8.4% share of these imports into the EU.

Table 8: Average unit prices of imports originating from developing countries by product category, 2018 in €, annual average growth

Product Category	Average price	5-yr Change
Coats, jackets, blazers	€13,14	+€0.34
Fashion sportswear	€10,68	+€0,50
Denim	€6,95	-€0,05
Suits and ensembles	€6,90	-€1,34
Pants, trousers and shorts	€5,66	-€0,18
Dresses	€5,15	+€0,10
Knitwear	€4,82	+€0,23
Skirts	€4,75	+€0,72
Men's shirts	€4,14	+€0,11
Women's tops, blouses, shirts	€4,12	+€0,26
Swimwear	€4,01	+€0,11
Leather	€3,62	-€2,20
T-shirts (men's and women's)	€1,67	+€0,01
Bodywear	€1,18	+€0,07

Overall average	€3,65	+€0,18

Source: Eurostat

The average unit prices of apparel imported to the EU from developing countries varies greatly depending on product category. coats, jackets and blazers, and fashion sportswear cost more and have average unit import prices of €13,14 and €10,68 respectively. T-shirts and bodywear are mass-market, low value apparel with average import unit prices of €1,67 and €1,18 respectively. Most product categories have seen positive price development in the last five years. Skirts' prices increased the most at 18% from their 2013 average unit price, going from €4,03 then to €4,75 in 2018. Other categories increased from 0.8% to 6.6% compared to their 2013 prices. Prices in four product categories went down in the last five years, with leather, and suits and ensembles noting the most drastic changes. Leather prices declined by 38% in the period, while suits and ensembles went down by 16% in comparison with their 2013 unit prices.

Tips:

- Increase your focus on fashion sportswear and active sportswear. Europe has strong demand for these two product categories, increasingly importing them from developing countries. Fashion sportswear also has a high average unit price and positive price development in the past five years. For more details, see the CBI study Exporting Sportswear to Europe.
- Decide to focus on one of the other interesting product categories based on market size, growth and positive price development. These include knitwear and dresses, imported at average unit prices ranging from €4,82 to €5,15. Swimwear is another market with high potential, although it is a niche compared to the leading categories. Develop strong production and design competencies in these product groups.
- Consider entering the sustainable apparel market which is expected to be lead the future of European imports. Understand buyers' sustainability requirements and research where and how you can implement them, for example, by using sustainable materials, implementing more eco-friendly production processes and recycling.
- Keep in mind that there is not only one target group in the apparel market. Niche segments can also offer business chances. Identify the market segment that would be the best fit for your company.
- Do not enter the suits and ensembles product segment unless you have a clear production and design advantage. Opportunities in suits and ensembles, as well as leather seem to be declining along with a decline in import values and strong negative price development.

This study has been carried out on behalf of CBI by M-Brain GmbH.