

Exporting apparel for seniors to Europe

As the European population continues to age, so does the demand for long-term care in institutional, residential and semi-residential settings. This means that there is a growing need for adaptive clothing that is comfortable and appealing for individuals who have carers help them in daily tasks and that is practical and convenient for carers too. This makes Europe an interesting market for exporters from developing countries who offer adaptive clothing for seniors requiring care.

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1. Product description

This study about adaptive clothing focuses on clothing for the elderly requiring long-term care in institutional and semi-residential environments.

Adaptive clothing consists of a broad range of products that includes:

- easy access and easy closure clothing and sleepwear;
- garments designed for incontinence;
- nursing home and healthcare clothes;
- open back shirts and blouses, dresses, skirts and drop-front trousers;
- underwear and socks;
- wheelchair ponchos.

Quality

Functionality

Clothes in this segment need to be highly convenient to enable caregivers to help people dress and undress easily and quickly. This entails, for example, simple closures and fasteners such as Velcro, detachable and removable elements. Adaptive clothing should also have long durability and ease of care, i.e. easy to wash and fast to dry. In addition, adaptive clothing must be comfortable and appealing for people who already have difficulties dealing with simple tasks such as using buttons and who may be self-conscious about their dignity.

Material

The fabrics for this type of clothing must be soft, non-irritating and have a good drape. In addition, the garments should be durable. Cotton-polyester blends are commonly used in clothing for the elderly, as they are soft, durable, and machine washable. Fabrics are preferably antimicrobial, breathable, washable at high temperature, technologically developed to transport moisture, flame resistant and odour adsorbent.

Size

The European apparel industry is pushing for standard sizing legislation, but sizing systems still vary across

Europe. [The European clothing standard](#) EN 13402 can provide you with direction. This is a European sizing designation for clothes based on body dimensions and intervals.

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

Table 2: Sizing across Europe

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

Sizing and shaping are important factors in the appeal and wearability of apparel, particularly for the elderly. Consumer demand for more personalised sizes is a growing trend in sizing. A good fit is important to the elderly and disabled. This means that it is acceptable to slightly amend a standard pattern size 38 garment to fit the body shape of this group, yet it can still be considered a size 38.

Colour and design

Next to functionality, appearance remains important. Many apparel retailers assume that the elderly are only looking for comfort and primarily stock garments with limited style, such as trousers with elastic waistbands, tracksuits and floral dresses. While many seniors may prefer a conservative and classic style, others may opt for a fashionable look in their later years.

Labelling

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

- size
- origin
- wash and care instructions

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

According to GINETEX, labels should cover the following topics:

- general care and warnings
- washing
- drying
- ironing
- professional textile care or dry-cleaning

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

Tips:

Study common care labelling practices in Europe on the [GINETEX](#) website.

If you produce eco-apparel, clearly indicate this with at least one of the available label schemes, such as the [EU Ecolabel](#), to attest the sustainability claims of your product.

For more information on labelling, refer to the [section on buyer requirements](#).

Packaging Documentation

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

Importer specification

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

Damage prevention

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

Dimensions and weight

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

Cost reduction

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

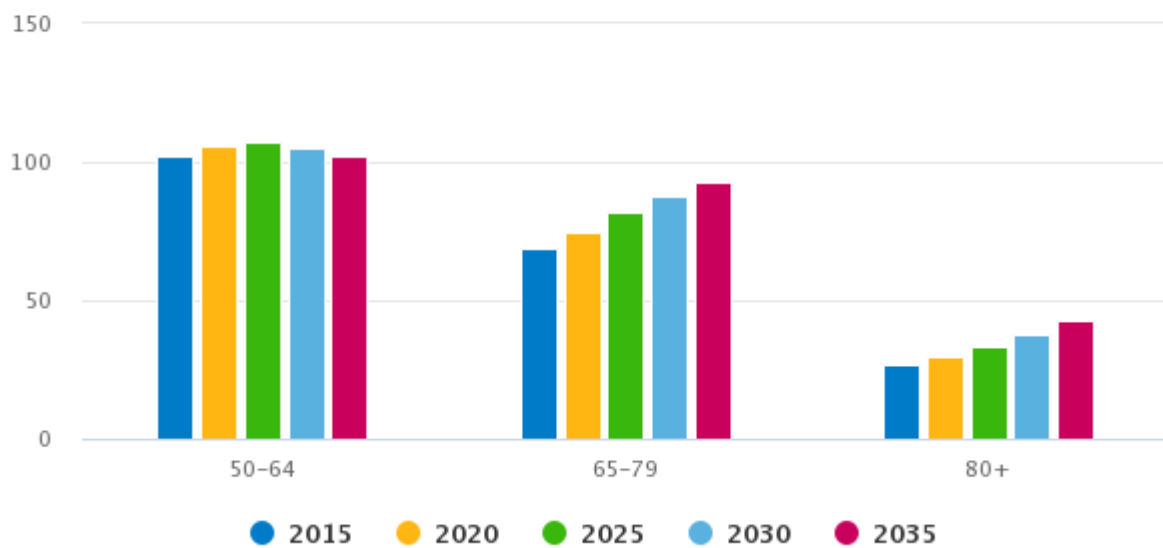
Material

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

2. Which European markets offer opportunities for exporters of adaptive clothing for the elderly care sector?

There is no relevant trade or production data available about apparel specifically targeting adaptive clothing for the elderly care sector. Nevertheless, the leading manufacturers and exporters of general apparel to Europe are China, Bangladesh and Turkey, all developing countries. These countries are likely to be the main suppliers of adaptive clothing in Europe too.

Figure 1: Projected size of the European elderly population, by age group
in million



Source: Eurostat

As the European population gets progressively older, the European market of adaptive clothing for the elderly care sector offers interesting opportunities.

The largest consumers of general apparel in Europe are Germany, the United Kingdom, France, Spain, Italy and the Netherlands. Specifically in relation to age demographics, high-potential markets for adaptive clothing for the elderly care sector include Germany, Italy, the Netherlands and Austria (also a large consumer), which are in [the top 10 most elderly populations in Europe](#).

Tips:

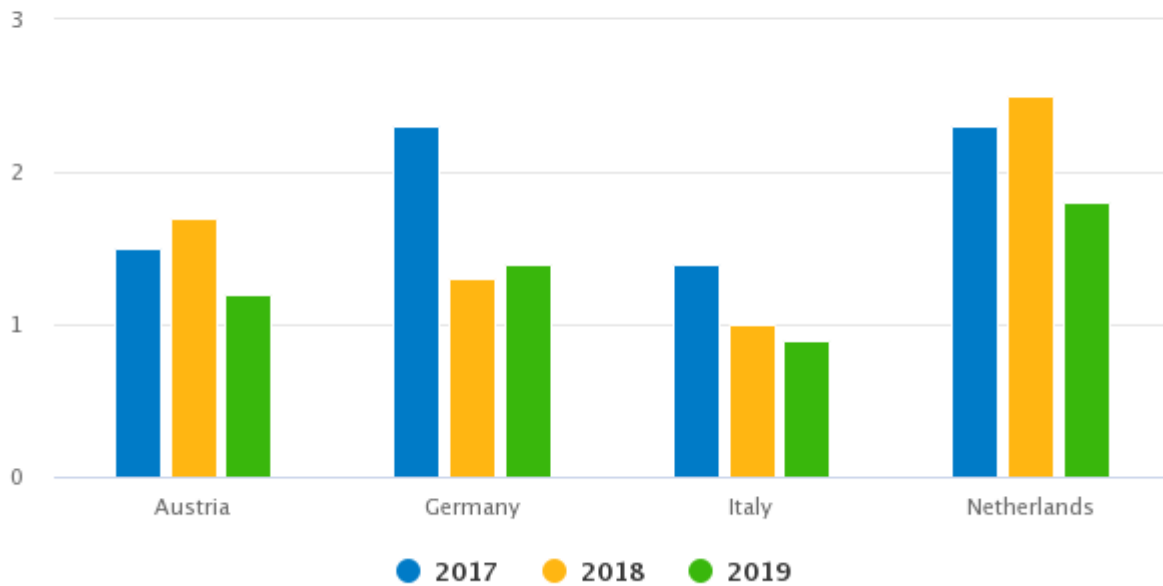
Study your options in Germany, France, the Netherlands and Austria, as well as the United Kingdom, Spain and Italy.

Compare your products and company to leading apparel exporters from China, Bangladesh and Turkey. You can use [ITC Trade Map](#) to find exporters per country. You can compare by market segment, price, quality and target countries.

Real private consumption expenditure affects European demand

Figure 2: Real private consumption expenditure growth

in %



Source: Eurostat

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

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

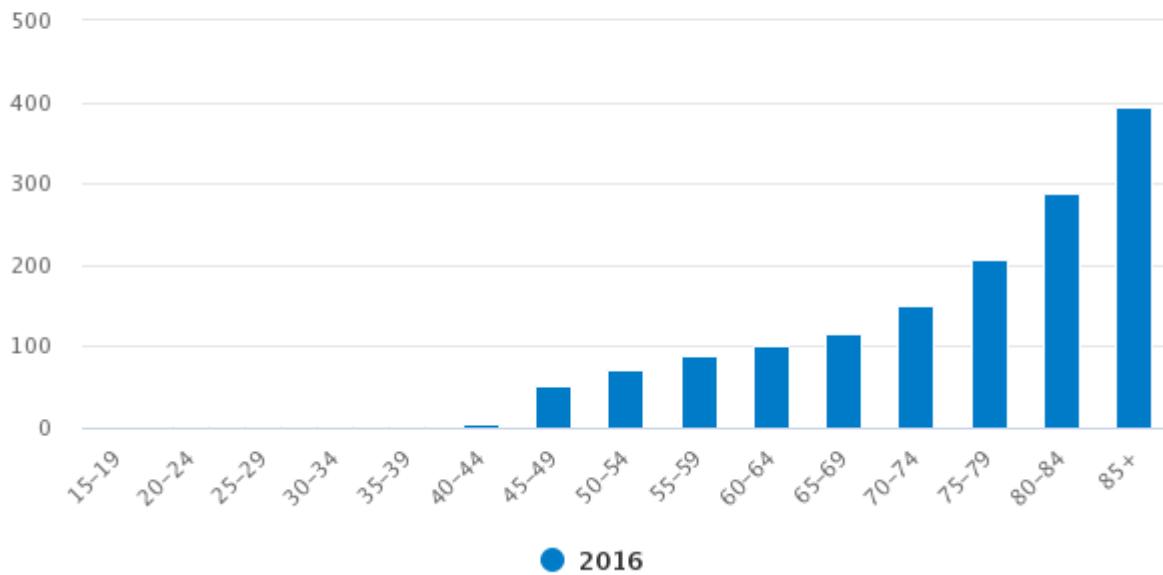
For more information on general apparel trade statistics, see our study about [which European markets offer opportunities for exporters of apparel](#).

3. What trends offer opportunities in the European market of adaptive clothing for the elderly care sector?

Increased demand for long-term care

With an aging population, the European need for long-term care services in institutional, residential and semi-residential settings is increasing. [The WHO defines long-term care](#) as a set of services required by people with a reduced degree of physical or cognitive functional capacity who, as a consequence of this, depend on help with basic or instrumental activities of daily living for an extended period of time.

Figure 3: Median dependency rates in Europe (for at least the last six months), by age group



Source: Eurostat

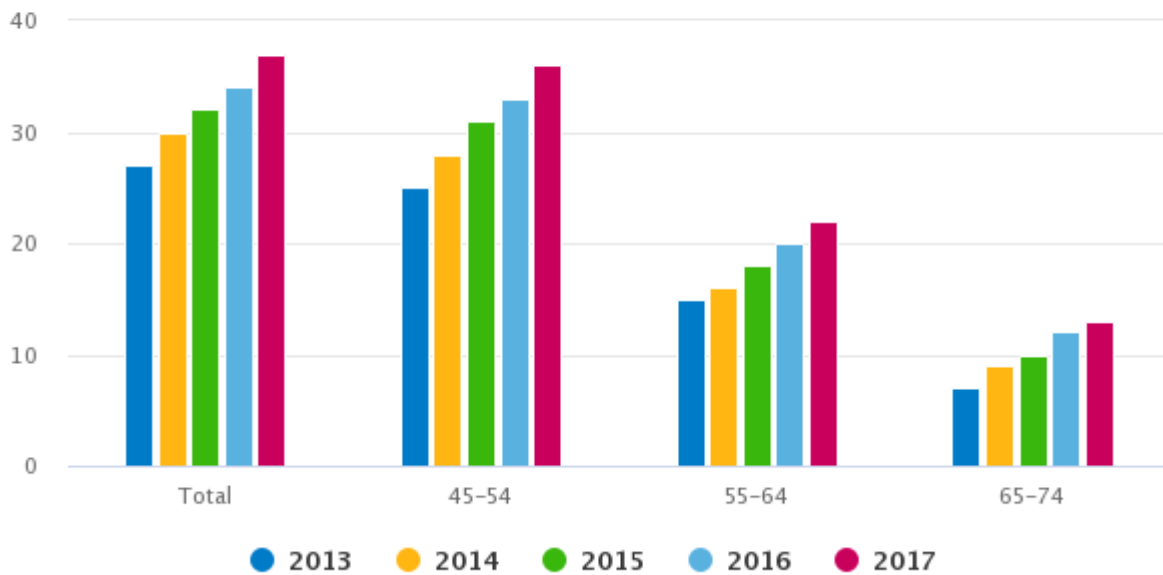
Dependency rates and the need for long-term care are higher for older age groups. Almost 40% of Europeans aged 85 and older required long-term care for a period of at least six months in 2016, compared to 12% of those aged 65-69. For people under the age of 64, these rates vary from 10 to 1%.

As the number of seniors in the European population grows, the number of people who need long-term care is expected to rise too. With this rising demand for long-term care comes an increased need for adaptive clothing for elderly care. Long-term care is labour intensive and increasingly relies on the formal sector, expanding the need for functional apparel. The use of adaptive clothing facilitates care and allows caregivers more time to focus on strictly caregiving activities.

E-commerce is on the rise

Online shopping is growing rapidly in Europe. Elderly consumers are following this trend, though less actively than younger shoppers. They increasingly buy online likely due to the convenience of home shopping and home delivery as opposed to visiting actual stores. Although there is no data showing whether seniors do their own shopping themselves, if their children and caregivers help them do it or do it for them, supplying e-commerce retailers can offer good opportunities.

Figure 4: Percentage of Europeans who have purchased clothes or sports goods online, by age group



Source: Eurostat

Sustainability is increasingly more important

There is a growing group of conscious consumers in Europe, to whom social and environmental responsibility is increasingly important. Although adaptive garments are primarily used for their functionality, using and promoting sustainable natural materials or recycled fibres is a key way to meet an increasing demand for sustainability, and so is obtaining certification and operating in a transparent way. An example of sustainable fabrics are those made with [Tencel](#).

Tips:

Use sustainable materials and production processes and consider developing sustainable concepts. For example, focus on social sustainability and working processes.

Promote your sustainable values to boost your marketing.

For more information, see our special study on [sustainable apparel](#).

Oversized clothing for the elderly

Demand for plus-sized or oversized clothing is expected to increase in the coming years. For many years now, the average body measurements of the general European population have been showing a tendency towards larger sizes. This development is also relevant for the elderly segment.

Tip:

Read more about [the challenge of overweight and obesity](#) in the European Region in this overview from the World Health Organisation.

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

4. What are the requirements for adaptive clothing for the elderly care sector to be allowed on the European market?

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

General product safety

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

Tips:

Read more about the [General Product Safety Directive](#).

Use common sense to ensure normal use of your product does not cause any danger.

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

Packaging legislation

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

Restricted chemicals: REACH

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

Tips:

The European Chemical Agency provides useful information and tips on REACH. See for instance [REACH Annex XVII](#) for a list of all restricted chemicals. Check also the [Information on REACH for companies established outside Europe](#) and the [Q&As on REACH](#).

Follow new developments in the field of flame retardants, as new alternatives are being developed. See for instance the [European Flame Retardants Association](#) (EFRA).

Textile Regulation

According to the European Union's [Textile Regulation](#), textile products should be labelled or marked to indicate their fibre composition in the language of the country where you are selling your products. These labels should

be durable and tear resistant, securely attached, easily legible, visible and accessible.

Tip:

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

5. What additional requirements do buyers often have?

Sustainability

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

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

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

Tips:

Optimise your sustainability performance. Studying the issues addressed by these initiatives will help you focus on the requirements that apply specifically to your product and your business.

Buyers appreciate a well-grounded story. Showing that you value your company's environmental and social performance may provide you with a competitive advantage.

Use a self-assessment tool such as the [BSCI Self-Assessment for Producers](#) or a code of conduct such as the [BSCI Code of Conduct](#) and the [ETI base code](#) to evaluate your performance.

For more information, see our special study on [sustainability in the apparel sector](#).

What are the requirements for niche markets?

Fair trade

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

Common fair-trade certification awarding organisations include:

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

- [Fair Wear](#)

Tips:

Ask buyers what they might be looking for. Especially in the fair-trade sector, you can use the story behind your product for marketing purposes.

Check the [ITC Standards map database](#) for more information on voluntary standards and their requirements, including fair production.

Sustainable textile certification

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

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

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

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

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

Tips:

Read more on [GOTS](#), [OEKO-TEX](#) and the [EU Ecolabel](#) in the ITC Standards Map.

Determine which certification programme would be the best fit for you and apply if possible.

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

6. What is the competition like in the European market of adaptive clothing for the elderly care sector?

The field of competition in the European market of adaptive clothing is somewhat comparable to that of the overall apparel market. However, competition is a lot less fierce, as there have been fewer competitors targeting this group until now.

Refer to our [10 tips for doing business with European buyers](#).

7. Through what channels can you get adaptive clothing for the

elderly care sector on the European market?

Market channels

Adaptive clothing is mainly sold via physical shops, but online sales are growing. In Europe, catalogue shopping and on-site sales at institutions are also important purchase channels.

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

Elderly shoppers are less interested in large, out-of-town superstores that offer near-endless choice and cater to big-basket shoppers. Greater opportunities exist for concepts aiming at care homes and independent local retailers. These retailers can be usually reached through national trade fairs and agents.

Trade associations and fairs

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

- [Exposanita](#), Italy, April
- [Lebenslust](#), Austria, April
- [Naidex](#), United Kingdom, March
- [Recare](#), Austria, May
- [Rehacare](#), Germany, September

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

Tips:

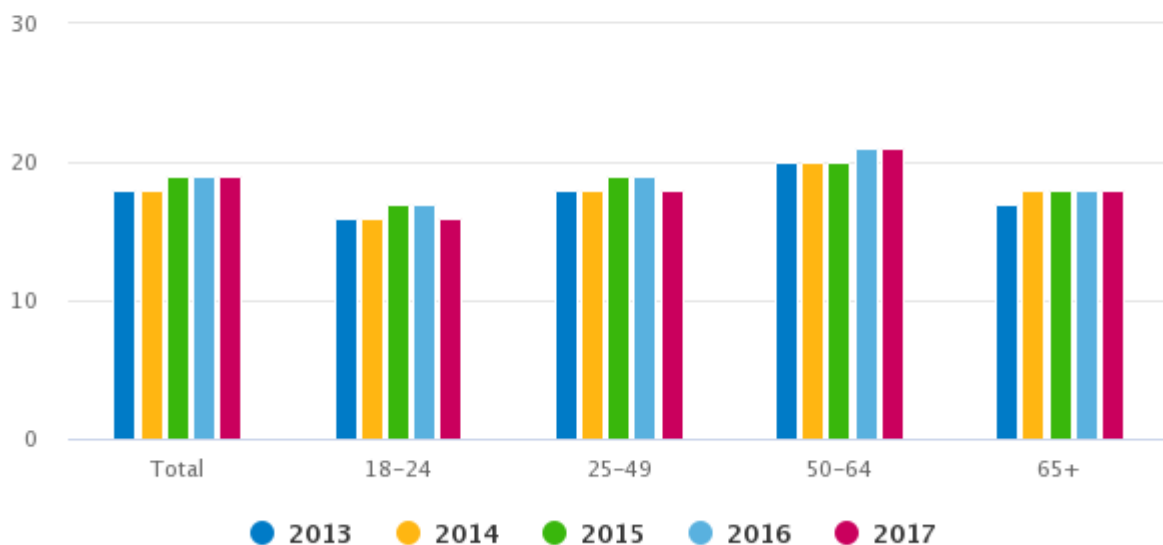
When adjusting mainstream clothing to make dressing easier for the elderly think about zippers and elastic waistbands, snapback clothing, magnetic buttons or Velcro closures.

Market segments

There are relatively few suppliers of adaptive clothing for the elderly care sector, compared to apparel in general. Most suppliers are mainly standard suppliers providing purely functional adaptive clothing, as well as a few major brands that occasionally launch adaptive clothing.

The 50–64 age group in Europe is relatively wealthy. They have the highest disposable income of all age groups. The 65-plus age group, however, has a disposable income below that of the total European average.

Figure 5: Mean equalised net income in Europe, by age group
in € thousand



Source: Eurostat

Tips:

If you have a designer brand that specialises on adaptive clothing, you should focus on the younger cohort of those requiring long-term care. They are still prepared to spend more for fashion and quality and do not want to be associated with being old.

If you are a private label fashion manufacturer, develop a small adaptive clothing collection to offer to your present buyers or importers, in addition to your regular fashion sample collection.

If you are a manufacturer of adaptive clothing for hospitals and other types of caring environments, include some fashion details and colours in your sample collection to stand out from competitors.

Take a look at our study about [exporting apparel for 50-plus consumers to Germany](#).

8. What are the end market prices for adaptive clothing for the elderly care sector?

The European consumer price for your apparel will be around four to six-and-a-half times your selling price or even more if you would cater to the high-end segment. Shipping, import and handling add 15–20%. Wholesalers account for a further 40–70% markup. Retailers may add at least another 100–150% to the price. Finally, European VAT rates range from 18% in Malta to 27% in Sweden.

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


Tips:

The perceived value of your product in the chosen segment determines its price. The quality and price of your garments must match what is expected in your chosen target segment. To determine your price, study consumer prices in your target segment and adjust your prices accordingly. Use top-down calculation to determine your maximum selling price.


Understand your segment. Offer a correct marketing mix to meet consumer expectations. Adapt your business model to your position in the market.

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