

## Exporting aprons to Europe

The European market for aprons is growing, with most of its imports originating from developing countries. The middle to high-end segments offer you the most opportunities. Focus on design and quality to appeal to consumers in these segments. Using sustainable fabrics can give you a competitive advantage as well. The gift market is also promising, especially in combination with co-creation efforts.

### Contents of this page

1. [Product description](#)
2. [Which European markets offer opportunities for exporters of aprons?](#)
3. [What trends offer opportunities on the European market for aprons?](#)
4. [What requirements should aprons comply with to be allowed on the European market?](#)
5. [What competition do you face on the European aprons market?](#)
6. [Through what channels can you put aprons on the European market?](#)
7. [What are the end-market prices for aprons?](#)

## 1. Product description

Aprons are protective clothing used during food preparation, to protect your regular clothing from stains and for hygienic reasons. It is a garment covering the front of the body and is used both in restaurants and at home.

There are three main types of apron:

- full aprons – the most common type that also covers the upper part of the body
- waist aprons – cover the body only from the waist down, used mainly by waiters
- tabards – an open-sided upper overgarment that covers both the front and the back of the body, worn in catering, cleaning and health-care industries or at home

This study uses the following codes to indicate trade in aprons:

Table 1: Product codes

Harmonised System (HS)	Prodcom	Description
6211 42 10	14122120	Women's or girls' aprons, overalls, smock-overalls and other industrial and occupational clothing made of cotton (excluding knitted or crocheted)
6211 43 10	14122120	Women's or girls' aprons, overalls, smock-overalls and other industrial and occupational clothing made of manmade fibres (excluding knitted or crocheted)

### Quality

#### Functionality

Because of their protective use for clothing, aprons need to be waterproof or easily washable.

## Material

Aprons can be made of several materials, but the ones used for cooking are mostly made of cotton or other textile material. Sturdy materials and durable stitch work are key. The kind of fabric is an important determinant of quality. Cotton-polyester blends are easy to wash, dry and treat. Waterproof household aprons can also be made of oilcloth or PVC. Vinyl is very easy to wipe clean.

Flame-retardant or flame-resistant materials add quality to aprons and prevent cooks from burns or spitting fat and flame flare-ups. Flame-resistant aprons are costly, with prices usually 10-20 times higher than conventional aprons.

## Durability

Another important determinant of quality is durability, as aprons are soiled and need regular washing. The fabric should be washable at higher temperatures (at 40 °C or higher) without shrinking or fading.

## Size

Most aprons are one-size-fits-all and most of them can be adjusted to fit.

Although they vary widely, common standard sizes in Europe are:

- full apron – 61x84 cm, 58x73 cm, 60x70 cm, 73x80 cm
- waist apron – 30x60 cm, 35x60 cm, 60x100 cm
- tabard – 80x88 cm, 92x100 cm, 104x112 cm, 116x124 cm

## Design

Aprons should be stylish and practical in design at the same time. Consumers often prefer aprons with handy pockets or pouches and the 'look' of an apron is becoming increasingly important. As the hospitality business depends a lot on image, 'style' should not be overlooked. Appealing designs can be accomplished through an apron's cut and the material's pattern.

## Labelling

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

The most important information on the product or packing labels of aprons is: composition, size, origin and care labelling. For more information, refer to the chapter on buyer requirements.

## Packaging

You should pack aprons according to the importer's instructions. Packaging usually consists of plastic wrapping to protect the fabric from water, solar radiation and staining. It should be easily manageable in terms of size and weight and ideally fit together on (Euro) pallets. When in doubt, check the dimensions with your buyer.

Aprons for domestic use are usually displayed and sold hanging. Any consumer packaging must be simple in design, but functional: it needs to protect against water and staining.

## 2. Which European markets offer opportunities for exporters of aprons?

European imports of aprons are increasing, with developing countries as their main source. Europe's main importers of aprons are Germany, France, the United Kingdom and Belgium. Especially Germany, the United Kingdom and Belgium are interesting focus countries, with a strong market for developing countries.

(!) No specific trade data are available for aprons in general. These statistics cover women's or girls' aprons, overalls, smock-overalls and other industrial and occupational clothing. For readability, the term 'aprons' has been used in the text.

## Where is consumer demand located?

- European demand for aprons increased between 2012 and 2016. With an average annual growth rate of 5.3%, it reached €27 million in 2016.
- Demand is highest in the United Kingdom at €5.0 million. Poland, Portugal and Italy follow with €3-4 million each.

## What is the role of European production in supplying European demand?

- Europe's demand for aprons is fairly balanced with its production. Combined with considerable exports, this drives the need for imports and makes Europe an interesting market.
- After peaking in 2014, European apron production has stabilised around €27 million.
- The United Kingdom, Poland, Portugal and Italy are Europe's leading apron producers. Together, they are responsible for around  $\frac{2}{3}$  of European production.

## Which countries are most interesting in terms of imports from developing countries?

- European imports of aprons increased from €224 million in 2012 to €250 million in 2016. This corresponds to an average annual growth rate of 2.7%.
- In the coming years, European imports are expected to keep growing moderately.
- Developing countries are Europe's main source of apron imports, supplying around 60%. This amounted to €148 million in 2016. This share is also predicted to stay stable in the coming years.
- In reality, many of the apron exports from Western European countries are re-exports of products manufactured in developing countries.
- Germany is Europe's leading importer of aprons, with €50 million in 2016. France (€37 million), the United Kingdom (€34 million) and Belgium (€33 million) follow. Together, this is more than half of Europe's total imports. Although Belgium is a relatively small country, its role as a European trade hub can account for its high imports.
- Germany, the United Kingdom and Belgium are leading when it comes to imports from developing countries, with €23-30 million each. For the United Kingdom and Belgium, this is around  $\frac{3}{4}$  of their total imports!
- The strong performance of developing country suppliers in the United Kingdom and Belgium is evidenced further by strong increases between 2012 and 2016. These countries upped their imports from developing countries with €6.7 million and €13 million respectively.
- China and Tunisia lead European apron imports, with a combined supply of around 30% in 2016. Other leading developing country suppliers are India (5.8%), Morocco (4.6%) and Pakistan (4.6%).

### Tips:

Study your options in Germany, France, the United Kingdom and Belgium. Their large imports from developing countries make Germany, the United Kingdom and Belgium especially interesting markets.

The upcoming [Brexit](#) (the United Kingdom leaving the European Union) has decreased the value of the British Pound. As a result, more British buyers have started importing directly from developing countries rather than buying from European importers. However, as the situation is still fluid and insecure, you should keep a close watch on the developments.

Compare your products and company to the strong competition from China and Tunisia, as well as India, Morocco and Pakistan. You can use [ITC Trademap](#) to find exporters per country. You can compare on market segment, price, quality and target countries.

## What role do exports play in supplying European demand?

- European apron exports consist mainly of trade within Europe and with developed countries.
- Germany is Europe's leading apron exporter with €25 million, followed by the United Kingdom and Belgium with €15 million each.

## What is the effect of real private consumption expenditure on European demand?

- Private consumption expenditure is an important indicator for the European home decoration market. The sector is closely linked to economic conditions. When money is tight, consumers postpone buying non-essential items until they have enough disposable income.
- Between 2017 and 2019, European private consumption expenditure is expected to increase. This means that consumption of decorative products is likely to rise. Especially in emerging markets, consumers will have more money available to spend on decorating the home. Consumers in mature markets already spend a fair amount of money on decoration, so growth in their consumption will be moderate.

## 3. What trends offer opportunities on the European market for aprons?

### Master chefs

Consumers are now spending more time in the kitchen. This has led to a trend of amateur home cooks 'presenting themselves as master chefs'. In line with this, people are willing to pay more for professional-quality kitchenware (durability, energy/space saver, ergonomic, 'glam' kitchen tools etc.).

A lot of the kitchen story is linked to 'showing' the space, the equipment and 'sharing' the meal. This is likely to boost the market for (fashionable) aprons as well. Aprons can be as expressive as any other piece of clothing and still maintain a practical function.

#### Tip:

Develop a product collection to offer a complete range in the same style, which could include table linen as well as kitchen/dish towels.

### Further segmentation of the middle market

The middle market is polarising towards a lower and higher-end segment. The lower segment is betting on extremely low prices at the expense of product quality. This trend requires innovative ways to keep production costs as low as possible. Examples are smaller-sized aprons and loosely woven cotton. To add value to lower-priced aprons, there is a strong trend towards the use of prints. This is relatively cheap, especially compared to higher-quality weaving.

In the upper segment, aprons are increasingly seen as a fashionable accessory, rather than a purely practical item. More fashionable styles are offered. Bright colours, patterns or designs such as artwork or comics are in high demand. The general trend of 'design your own' products has also reached the market for aprons. Such aprons are often sold as gifts.

#### Tips:

If you have a mechanised production system and are able to compete on the lower market, keep your

product as basic as possible and production costs low.

To appeal to the upper segment, you need to pay attention to product design. Consider the possibility of 'designing your own' aprons.

## Environmental and social responsibility

Even though it is still niche, there is a trend towards more sustainable materials and a sustainable production process. This trend is growing strongly in the apron market. Social and environmental responsibility is an increasingly important aspect when addressing the mid-high to high-end market segment. You can address this trend by using and promoting natural materials or recycled fibres, or by obtaining certification.

### Tips:

Use natural materials, like linen or cotton. A good way to differentiate is to make unique combinations of materials.

Promote the sustainability of your product so that buyers are aware of this.

You can also use organic cotton or other certifications to further enhance your product.

For more information, see our special study about [sustainability](#).

## Aprons as gift items

In the higher segment, the practical use of aprons is making way for appearance and decorative aspects. This creates opportunities within the gift market. Entering this market requires gift packaging and increased marketing efforts. Co-creation with producers, retailers and marketers can increase potential.

### Tips:

Consider entering the gift market with your aprons.

Consider making your aprons part of a gift set with other products such as placemats and napkins.

When considering the gift market, research the options available to you in the area of special packaging.

## Garden trend

Using the garden as extra space 'in' the house has become a trend. Cooking in the garden has also become very popular, for example with barbecues or even complete outdoor kitchens. The style used for the garden often focuses on sturdy materials and accents (canvas, leather, etc.).

### Tips:

Consider entering the garden and outdoor market with your aprons.

Consider making your aprons part of a range that also includes other products, such as oven mitts and potholders.

For more information, see our study about [trends for Home Decoration & Home Textiles](#).

## 4. What requirements should aprons comply with to be allowed on the European market?

### What legal and non-legal requirements must your product comply with?

#### General product safety

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

#### Tips:

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

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

The [RAPEX database](#) lists products that the European Union has rejected at the border, or withdrawn from the market. Check the database for similar products for an idea of what issues may arise.

#### 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. Also check out the [information on REACH for companies established outside Europe](#) and the [Questions & Answers on REACH](#).

Follow new developments in the field of flame retardants, as new alternatives are being developed. You can do so, for instance, through 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. 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](#).

## Packaging legislation

Europe has specific [packaging and packaging waste legislation](#). Among other things, it restricts the use of certain heavy metals. Europe also has [requirements for wood packaging materials](#) (WPM) used for transport, such as packing cases, boxes, crates, drums, (box) pallets and dunnage.

**Tip:**

Read more in the [overview of EU rules on wood packaging material](#).

## What additional requirements do buyers often have?

### Sustainability

Social and environmental sustainability make your products stand out on the European market. Think of sustainable raw materials and production processes. European buyers increasingly demand the following certification schemes:

- [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 has been 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. It aims to improve the working lives of people across the globe that make or grow consumer goods.

You can use standards such as [ISO 14001](#) and [SA 8000](#) to read up on sustainable options. However, only niche market buyers demand compliance with such standards.

**Tips:**

Optimise your sustainability performance. Reading up on the issues included in the initiatives will give you an idea of what to focus on.

Buyers appreciate a good story. If you can show that you value your company's environmental and/or social performance, this may be a competitive advantage. You can do this, for instance, with a self-assessment like the [BSCI Self-Assessment for Producers](#), or a code of conduct such as the [BSCI Code of Conduct](#) and the [ETI Base Code](#).

For more information, see our special study on [sustainability in the home 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 aprons is labour-intensive, fair trade certification can give you a competitive advantage.

Common fair trade certifications are from:

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

#### Tips:

Ask buyers what they are 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

Across the home sector, sustainability is gaining ground. Although the actual use of certification is still not widespread in home textiles, there is an increasing interest from buyers.

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

[OEKO-TEX](#) Standard 100 certification guarantees no hazardous chemicals were used during production.

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 about [buyer requirements for Home Decoration & Home Textiles](#).

## 5. What competition do you face on the European aprons market?

The competition for aprons does not differ significantly from the sector in general. Refer to our [10 tips for doing business with European buyers](#).



## 6. Through what channels can you put aprons on the European market?

The market channels and segments for aprons do not differ significantly from the sector in general.

### Market channels

Aprons can be found in a wide variety of stores, ranging from low-end discounters to more high-end retailers. Many shops that are not specialised in home textiles also sell aprons, because they are popular as gifts or may compliment the rest of their kitchen/table linen range. Think for instance of gift shops, garden centres (outdoor kitchen or barbecue) and especially supermarkets.

The channels through which aprons are put on the market follow the traditional patterns: import via importers/wholesalers that supply to retailers, and larger retail chains that import themselves. E-commerce is still gaining in importance and more and more smaller retailers start buying directly from the supplier, but mainly when it comes to very high-end aprons.

#### Tip:

For more information about trading directly with smaller retailers, see our special study about [alternative distribution channels](#).

### E-commerce

E-commerce in home textiles is increasing and can help you reach a broader range of customers. Retailers often combine online and offline channels. Consumers research and purchase products online, shopping around and comparing prices on home textile items. To supply e-commerce you must be able to work with individual packing and labelling, as well as limited minimum orders.

#### Tips:

See our special study about [e-commerce in Home Decoration & Home Textiles](#) for more information.

Target online business-to-consumer retailers if you can meet the additional requirements.

### Trade associations and fairs

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

- [Ambiente](#), Frankfurt, February
- [EURATEX](#), European Apparel and Textile Confederation
- [Heimtextil](#), Frankfurt, January
- [Maison et Objet](#), Paris, January and September

### Market segments

In the low-end segment, simple and inexpensive aprons are common.

The middle segment also includes aprons made of sustainable raw materials like organic cotton. To supply the

middle-high segment, you need to offer added value in the materials and/or craftsmanship you use, for example: combinations of different materials, higher-end accessories (buckles), special print designs, embroidery or other value-adding techniques.

In the high-end segment, the quality of the material and finish is leading. The most expensive aprons are made of leather, for example.

Products from China and India generally dominate the low-end market. Competing with this type of cheap mass-production is almost impossible. Therefore, the middle to high-end markets offer you the most opportunities. To appeal to these consumers, you need to pay particular attention to design and quality.

## 7. What are the end-market prices for aprons?

Table 2 gives an overview of the indicative prices of aprons in the low-middle, middle-high and high-end market segments.

Table 2: Indicative consumer prices of aprons

	Low-middle end	Middle-high end	High-end
Aprons	€5–€10	€10–€40	€40–€150

The European consumer price of your aprons is around 4-6.5 times your selling price. Shipping, import and handling add 15-20%. Wholesalers account for a further 50-90% mark-up. Retailers may add another 90-150% to the price. Finally, European VAT percentages 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 have 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 value perception of your product in the chosen segment determines its price. The quality and price of your aprons must match what is expected in your chosen target segment. To determine your price, study consumer prices in your target segment and adjust your price accordingly.

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

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