

What is the demand for apparel on the European market?

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Europe is a strong apparel market and is home to some of the world’s biggest apparel companies. Europe’s apparel import market was valued at €176.9 billion in 2023 (up from €144.7 billion in 2018). Suppliers from developing countries contributed 44.4% of all clothing imported into the EU in terms of value, down from 48.4% in 2018. From 2018 to 2023, the European apparel market grew by an average of 4.1% per year. The biggest European importing markets include Germany, France, Spain, Italy, the Netherlands and Poland.

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1. What makes Europe an interesting market for apparel?

Europe is home to some of the world’s biggest and most renowned apparel companies and has a large and well-performing apparel sector. According to the [World Trade Organisation](#), the EU is the world’s largest importer of apparel and textiles. In 2022 the EU (2023 population: 449.4 million) accounted for 35.5% of the world’s apparel and textile imports in terms of value. The second top importer, the USA (2023 population: 334.9 million) accounted for 19.2%.

The European market is very diverse and suppliers are expected to offer a high level of service and flexibility (design, materials sourcing, minimum order quantity). The EU is also sustainability-driven and introduces ever stricter laws and regulations. This poses both a challenge and an opportunity for suppliers. It may be difficult to comply, but if you do, you will have a competitive advantage.

Compared to the European market, the US market is relatively homogenous and follows more traditional, less direct retail and distribution models (wholesale and private label). As a result, it is very price and volume driven. Many US buyers have offices located in production countries and source and select their own raw materials. Manufacturing is often done on a CMT (cut, make and trim) basis. This leaves little room for suppliers to add value.

Table 1: Key differences in buying models between USA and Europe

Europe	USA
OEM/ODM	CMT

Factory source raw materials	Nominated raw materials
Smaller order quantities	Large order quantities
Cost and speed driven	Cost driven
Faster fashion	Slower fashion
Development agents	Sourcing agents
Direct business	Wholesale and private label
One stop shops	Specialised product manufacturers

The EU is the region with the highest market share of imports from developing countries, defined here as those on the [OECD-DAC list](#). It is followed closely by the Americas (including Canada and Central and South America). The share of exports coming from developing countries that is destined for the EU increased by 2.36% in the 5-year period from 2017 to 2022.

Table 2: Share of total developing country exports, 2017-2022

Destination	Share of total exports 2017	Share of total exports 2022	5-year change
Africa	1.27%	1.44%	0.17%
Americas	24.74%	26.08%	1.34%
EU	24.76%	27.12%	2.36%
Asia	17.69%	15.25%	-2.44%

Source: ITC Trademap

Europe imported €176.9 billion of apparel in 2023 (up from €144.7 billion in 2018 but down from €193 billion in 2022), which equates to 27.4 billion units of clothing (down from 30.2 billion). Of the total value of imports, 50.9% was trade in knitted or crocheted apparel (up from 49.7% in 2018) and 49.1% was in non-knitted/woven apparel. Between 2018 and 2023, the market grew by an average of 4.1% per year.

Source: Eurostat 2023

In its [State of Fashion 2024 report](#), for that year, McKinsey predicts a global fashion sales growth of 3% to 5% for luxury, and 2% to 4% for the rest of the industry. The outlook is slightly less positive in Europe, with continued high inflation and interest rates. McKinsey predicts a European growth of 1% to 3% for non-luxury and

3% to 5% growth for luxury in 2024.

The European Commission's May 2024 [economic forecast](#) projects GDP growth at 1% in the EU. Inflation is however expected to fall from 6.7% in 2023 to 2.7% in 2024, mainly due to higher wages and a resilient labour market. The mindset of European consumers is also starting to change with respect to clothing purchases in favour of buying less and using more. People are buying higher quality seasonless products with a longer lifespan.

Figure 2: European apparel imports grew in recent years, but high inflation is negatively affecting end consumer spending on clothing



Source: [Who's Denilo ?](#) on [Unsplash](#)

Private consumption expenditure

When money is tight, end consumers postpone buying nonessential items. According to [Eurostat](#), in 2022, Europeans spent an average of 4.3% of their total expenditure on clothing and footwear, down from 4.7% in 2018. It is expected that the cost of living will continue to rise and negatively affect European consumption in the short term.

EU apparel export and intra-European trade

The EU is also a large exporter and re-exporter of apparel. According to [WTO statistics](#), the EU was the second largest exporter of apparel in 2022 with a 27.1% share, second only to China. This is shown by Eurostat statistics for 2023, which indicate that the EU exported €140.3 billion worth of apparel (up from €107.3 billion in 2018) of which 73.3% was destined for other countries in the EU and 26.7% for the rest of the world.

EU apparel exports grew at an average yearly rate of 5.5% between 2018 and 2023. The biggest EU exporters in 2023 were Germany (€25.9 billion), Italy (€25.7 billion), the Netherlands (€15.1 billion), France (€14 billion), Spain (€13.6 billion) and Poland (€10.9 billion). Together, these 6 countries represented 75.2% of the EU's apparel exports. Poland and the Netherlands show the strongest export growth within this group with an average yearly increase in export value of more than 8%. Poland has grown by as much as 14% each year during the same period.

Apparel imports from developing countries

The EU imports a higher share of its apparel from inside the EU than from outside the EU, at 53.1% and 46.9% respectively. In 2023, developing countries were the origin of 44.4% of all EU clothing imports in terms of value (down from 48.4% in 2018 and from its peak of 49.2% in 2022). The value of EU apparel imports originating from developing countries corresponded to €78.5 billion in 2023 (up from €70.1 billion in 2018 but down from €94.9 billion in 2022) growing at an average yearly rate of 2.3% between 2018 and 2023.

Re-exports

In contrast, the value of EU apparel imports originating from within the EU remained stable between 2022 and 2023, increasing at a rate of 6.6% between 2018 and 2023. This suggests a continued interest in intra-EU trade. These statistics however hide the fact that a large portion of the EU's apparel imports from countries inside the EU are re-exports of apparel made in developing countries. Therefore, this portion is not in direct competition with imports from developing countries.

The top 6 intra-EU exporters are also the top 6 importers of apparel, indicating that certain EU countries are regional distribution hubs. The Netherlands in particular is a top exporter without a large local apparel manufacturing industry, but with a large port. As an already established apparel manufacturing country,

Poland’s exports to the EU increased by an average of 12.3% per year in the period from 2018 to 2023. Poland is quickly becoming a regional hub for distribution within Europe, in part thanks to lower labour and warehousing costs.

Source: Eurostat

China, Bangladesh and Türkiye top suppliers to Europe

Europe’s apparel imports from outside the EU are dominated by Asian countries. China, Bangladesh and Türkiye are the top 3 exporters to the EU, together accounting for 28.2% of all apparel imports into the EU in 2023. China has long been the single largest apparel exporter to the EU with 12.7% of EU import value, although its share has declined from 16% in 2018. Many Chinese factories have moved their operations to other developing countries such as Bangladesh, Cambodia, Myanmar and Vietnam due to cost and capacity.

Bangladesh, Pakistan, Vietnam and Myanmar all increased their shares of the EU apparel import market between 2018 and 2023, though marginally (between 0.2% and 0.3%). Myanmar has been the fastest grower, with an average yearly increase of 10% between 2018 and 2023, taking its exports from just under €1.54 billion in 2018 to €2.48 billion in 2023. In the same period, Pakistan, Vietnam and Bangladesh grew their exports to the EU by a higher rate than the overall EU import growth rate (4.1%).

Expect to see further growth in the coming years in imports from emerging developing countries as China’s share continues to decline.

Table 3: Top 10 Extra-EU exporters to EU, 2023 value, share in %, 5-year average annual growth

Exporter	Value	Share 2023	Change in share 2018-2023	5-year average growth
China	€22.5 bn	12.7%	-3.2%	-0.5%
Bangladesh	€17.4 bn	9.8%	0.2%	4.6%
Türkiye	€9.9 bn	5.6%	-0.2%	3.5%
India	€4.0 bn	2.3%	-0.4%	0.8%
Vietnam	€3.8 bn	2.1%	0.2%	6.1%
Cambodia	€3.2 bn	1.8%	-0.4%	-0.1%
Pakistan	€3.1 bn	1.8%	0.3%	7.5%
Morocco	€2.5 bn	1.4%	-0.3%	-0.2%
Myanmar	€2.4 bn	1.4%	0.3%	10%
Tunisia	€2.3bn	1.3%	0%	3.4%

China’s costs are increasing and the apparel workforce is declining. Growing Chinese domestic demand and allocation of capacity to domestic production is leading to a lack of capacity for exports, longer lead times and higher prices. According to [McKinsey](#), in 2005 China exported as much as 71% of the finished apparel goods it produced. By 2018, this figure was just 29%. Since 2018, this trend has continued with China’s share of EU imports falling by an average of 0.5% per year compared to an overall industry growth of 4.1%.

China is also increasing its focus on the production of more value-added products both within the apparel sector and other sectors (for example electronics and machinery). EU apparel buyers have realised that they have an overdependence on China. They are therefore pushing to diversify their purchasing. Although China will for the moment remain one of the largest suppliers of fabrics, accessories, trims and high-value apparel, its fast-fashion volume business is expected to continue to move to other developing country suppliers.

Nearshoring: production close to Europe

The 2023 [State of Fashion](#) report identifies low-labour cost manufacturing locations such as Bangladesh and Pakistan as countries that are likely to increase their share of global apparel exports and will take advantage of production moving away from China. With 65% of survey respondents (consisting of fashion executives and experts) considering nearshoring to address supply chain challenges, the report predicts that Türkiye, Eastern Europe and North Africa will benefit.

Germany, Italy, and the Netherlands are top intra-European exporters

Europe’s Intra-EU apparel trade is dominated by Germany, Italy and the Netherlands. These 3 countries supply 23.4% of all apparel imports (by value) into the EU in 2023. Spain, Poland and Belgium also play an important role. Together these top 6 countries supply as much as 38.6% of all intra-EU apparel imports. All but one top 10 EU exporter experienced growth equal to or above the overall EU import growth of 4.1% between 2018 and 2023.

Table 4: Top 10 Intra-EU exporters to EU, 2023 value, share %, 5-year average annual growth

Exporter	Value	Share	Change in share 2018-2023	5-year average growth
Germany	€19.5 bn	11.1%	0.00%	4.10%
Italy	€11.1 bn	6.30%	0.70%	6.50%
The Netherlands	€10.6 bn	6.00%	1.00%	7.80%
Spain	€10.2 bn	5.90%	1.00%	8.10%
Poland	€9.9 bn	5.60%	1.50%	17.20%
Belgium	€6.4 bn	3.70%	0.10%	4.80%
France	€6.3 bn	3.60%	-0.10%	3.50%

Denmark	€3.3 bn	1.90%	0.10%	4.80%
Czechia	€2.7 bn	1.5%	0.50%	12.20%
Portugal	€2.2 bn	1.30%	0.10%	6.00%

Source: Eurostat 2023

Eastern Europe is expanding, led by Poland and Czechia

Poland has the fifth-largest value of Intra-EU exports and has experienced an average annual growth of over 17% during the 2018-2023 period. The country is expected to expand its positioning as a major exporter and regional distribution hub for Eastern European countries as well as for large German retailers. In the region, Czechia has also experienced significant growth at 12.2%.

2. Europe is an interesting market for sustainable and circular apparel

Europe is one of the most interesting markets for sustainable apparel. There is a lot of awareness about the importance of sustainability and new initiatives are constantly emerging, pushed by all types of actors, including consumers, retailers, brands, governments and non-governmental organisations (NGOs).

Figure 4: Almost [half of all Europeans bought sustainable fashion items in 2022](#)



Source: [Erik Mclean on Unsplash](#)

The European Union's '[Green Deal](#)' aims to make Europe the 'first climate-neutral continent' by 2050. This collection of new laws and regulations includes legislation on:

- [Ecodesign for Sustainable \(textile\) Products](#);
- A '[right to repair](#)' for consumers;
- Due diligence regarding human rights and environmental protection ([CSDDD](#));
- Traceability and reporting ([CSRD](#));
- Deforestation-free products ([EUDR](#)). Currently, this only applies to the import of leather (skins);
- [Extended producer responsibility](#) (EPR), an initiative to make companies financially responsible for the environmental costs of textiles during their lifecycle;
- A '[Green claims](#)' directive to stop companies from using vague or misleading claims about the sustainability of their (apparel) products.

As a result, both smaller and established brands and retailers are using more sustainable materials and/or sustainable business models, including subscriptions, renting, recycling and upcycling. Examples include [MUD jeans](#), [C&A](#), [Arc'teryx](#), [H&M](#), [A.P.C](#) and [Houdini](#). According to a 2024 survey by PwC, [80%](#) of consumers globally are willing to pay an average of 9.7% more for products that are sustainably produced, despite recent cost-of-living increases.

Sustainable materials

Consumer awareness about the harmful effects of conventional fibre production is growing. A 2023 IFM-Premiere vision [study](#) about consumer behaviour in sustainable fashion (conducted in Germany, France and Italy) concludes that for German and Italian consumers, the type of materials used in an apparel item is the number one criterion for determining a product's eco-responsibility. More sustainable alternative materials are moving from niche to mainstream markets, creating opportunities for suppliers with the right raw material sourcing networks.

For example, [Inditex's JoinLife](#) collection was launched in 2015 to offer customers ethically-produced clothing with more sustainable fabrics and to raise awareness about fashion sustainability. Just 8 years later, Inditex dropped the JoinLife label stating that it is no longer necessary to differentiate more sustainable products, as more sustainable products are increasingly incorporated into [all](#) Inditex collections. In 2018, [Join Life accounted for 9% of Inditex's products](#). By 2022, "sustainable" garments represented 61% of the items placed on the market.

According to the [Fashion Transparency Index](#) 51% of the 250 leading brands globally disclose a sustainable materials strategy. Often these include materials for which there are pledges or targets; for example H&M has published a target for [100%](#) of its materials to be either recycled or sustainably-sourced by 2030.

China's increasingly strict environmental regulations have led to the temporary or permanent closure of tens of thousands of factories in the country in recent years. Factories that operate within the textile and garment sector are most likely to be dyeing factories which may create a bottleneck in terms of fabric lead times. This creates a further opportunity for other countries and suppliers with well-developed (sustainable) raw material supply routes.

Organic cotton

While cotton accounts for almost [25%](#) of the total global fibre production, approximately [75%](#) of the world's apparel products contain cotton. Organic cotton uses no chemical pesticides or fertilisers, produces fewer greenhouse gas emissions and is less thirsty than conventional cotton. Organic cotton also protects the environment where it is grown while providing a stable income with fair wages for its producers.

Demand for organic cotton is growing and is outstripping supply. According to the latest statistics from Textile Exchange, organic cotton fibre production grew by 37% between 2020 and 2021. Türkiye (the second-largest producer of organic cotton) was by far the biggest contributor to this growth. However, in 2021, just 1.4% of all cotton grown was certified organic. Meanwhile, global Google searches for organic cotton rose by as much as 82% between May 2017 and May 2023.

A 2021 [survey](#) of brands already engaged in organic cotton sourcing indicates an 84% increase in forecasted organic cotton demand by 2030 compared to 2020. The number of facilities certified to GOTS (Global Organic Textiles Standard) in 2023 was [14,676](#) (up 8% from the previous year and up over 250% since 2018 when the number totalled just [5,760](#)).

Opportunities exist for developing country suppliers to increase their market share through the development of organic cotton products: 18 out of the 21 organic cotton-producing countries are developing countries from the [OECD-DAC](#) list. These include Benin, Burkina Faso, Ethiopia, Mali, Tanzania, Uganda, Argentina, Brazil, Peru, China, India, Pakistan, Egypt, Kazakhstan, Kyrgyzstan, Tajikistan, Türkiye and Uzbekistan.

Figure 5: The demand for organic cotton is expected to increase by 84% by 2030 compared to 2020



Source: [Trisha Downing](#) on [Unsplash](#)

Recycled fibres

The [EU Strategy for Sustainable and Circular Textiles](#) aims to ensure that, by 2030, textile products placed in the EU market are 'long-lived and recyclable and to a great extent made from recycled fibres'. In response, individual countries are starting to publish targets for recycled-fibre use in apparel. The Netherlands, for example, aims to have all textile products contain 50% sustainable materials, of which at least 30% recycled content, by 2030.

The European fashion industry is scaling up the use of synthetic materials made from recycled inputs. Between 2020 and 2023, H&M increased the share of recycled materials used in its garments from 5.8% to 25% and the company plans to double this by 2030. Swedish brand [Haglöfs has set an ambitious target to use recycled or renewable materials](#) in 100% of its main fabrics by 2025. The number of Global Recycled Standard (GRS) and Recycled Content Standard (RCS) certifications increased by over 500% and 400% respectively in [2019](#) and [2022](#).

Polyester is the most popular material used in the fashion and textile industry, making up [52% of all fibres](#) produced. This reliance on virgin fossil-based materials is damaging to the environment. The 2025 [Recycled Polyester Challenge](#) – led by Textile Exchange which has more than 800 member organisations – has been calling for the fashion and textile industry to increase the market share of polyester that comes from recycled sources from 14% in 2019 to 45% in 2025.

Progress towards this goal has been slow: recycled polyester usage still accounted for only around [14%](#) of all polyester produced in 2022. The focus is now shifting towards textile-based feedstocks rather than plastic bottles as approximately [99%](#) of recycled polyester for the textile industry comes from mechanically-recycled bottles.

Tips:

For background information and practical guidance, check out the CBI study on the [European market potential for recycled fashion](#).

Check [Modint's fibre matrix](#) for a quick overview of conventional and preferred fibres.

Transparency

In March 2023, the European Commission adopted a proposal for a Green Claims Directive (GCD) aimed at preventing brands and retailers from making false sustainability claims towards consumers. It will require companies to back up their environmental claims with data. Soon, textile products placed on the EU market will also need to have an individual Digital Product Passport (DPP) - a digital information record of a unique product's complete life cycle.

Fashion Revolution's [Fashion Transparency Index](#) tracks 250 leading brands' performance with respect to the information they are able (and/or willing) to disclose. By 2023, 52% of major fashion brands in the index have disclosed their 1st-tier supplier lists, up from 32% in 2017. However, only 12% of the brands publish their raw material supplier lists. While 64% of the brands disclose their annual carbon footprint in their own operations (for example head office and retail stores), only 6% disclose the proportion of production that is powered by coal.

Tips:

For background information and practical guidance on producing and exporting sustainable apparel to Europe, check the CBI studies on [buyer requirements](#), [the sustainable transition in apparel](#) and [CBI's study on sustainable apparel](#).

Currently, the most effective way to provide transparency is through certification, either at product level (for example OEKO-TEX, GOTS, RCS) or facility/producer level (like WRAP, Sedex, Blue Sign, Fair Trade). Check the CBI studies [Tips on how to go green](#) and [Tips on how to become more socially responsible](#) for information on how to get certified.

3. Which European markets offer most opportunities for apparel?

The top 6 apparel import markets in the EU are Germany, France, Spain, Italy, the Netherlands and Poland. Together, these top 6 countries account for 73.3% of the entire EU apparel import market. Poland is the only Eastern European country in the top 10.

While some other Eastern European countries such as Latvia, Slovenia, Bulgaria and Croatia are growing at much higher rates than countries in Western Europe (around 10%), they are still relatively small in market size (under 1% market share). Poland is a market to watch due to its fast growth of imports, including imports from developing countries, and due to already being a sizeable market. Poland is expected to play an important role in the future as a distribution hub for Eastern European markets.

Table 5: Top 10 EU importers of apparel, 2023; developing country share of imports; developing country imports average annual growth

	Value 2023	Imports (5-year average growth)	Imports from developing countries (% of total imports)	Growth in imports from developing countries (% change over 5 years)	Change in importance of developing countries as source country (change in share 2018-2023)
Germany	€38.94 bn	4%	49%	2.4%	-3.9%
France	€23.7 bn	2.6%	43.3%	2.1%	-1.2%
Spain	€19.14 bn	3.2%	63.6%	0.7%	-8.2%
Italy	€ 18.04 bn	5%	44.7%	2.3%	-6.4%

Netherlands	€17.3 bn	2.9%	58.4%	1.5%	-3.9%
Poland	€12.51 bn	12.3%	30.8%	14.2%	2.4%
Belgium	€7.67 bn	-0.7%	47.8%	-3.3%	-6.7%
Austria	€6.04 bn	0.9%	13.3%	-3.7%	-3.5%
Denmark	€4.54 bn	2.6%	63.2%	2.9%	0.8%
Sweden	€4.48 bn	4%	46.8%	1.5%	-5.9%

Source: Eurostat 2023

Source: Eurostat 2023

Imports from developing countries

Spain stands out with a 63.6% share of imports from developing countries. Poland has increased its total value of apparel imports from developing countries by an annual average of more than 12% in the 2018-2023 period, and is one of only two top 10 countries for whom developing-country sourcing became more important (increased share). For other European countries, the market share that is sourced from developing countries is declining quite dramatically, indicating that nearshoring and regional distribution are playing a larger role.

China's import market share ranges from 8.1% for Poland to 20% for the Netherlands. China's share declined over the 2018-2023 5-year period by between 4.5% (Poland) and 1.7% (Spain). For each of the top EU markets China remains within the top two exporting countries with the exception of Poland (for which it ranks 4th).

Scandinavians pay more

Although Denmark and Finland have a population of just over 5 million and Sweden's population is just over 10 million, all 3 countries (as well as their non-EU neighbour, Norway) have a high [GDP](#) per capita and high [average wages](#). In 2023, Denmark had the [highest retail prices](#) for clothing and footwear within the EU (31% higher than the EU average) while Finland and Sweden ranked 3rd and 5th respectively. Scandinavian consumers are willing to pay more for high quality and for sustainable products in particular.

Unit prices paid by all of the top 6 importing markets have increased during the 2018-2023 period with the highest price increases seen in intra-EU trade.

Impact of Brexit

The United Kingdom's apparel imports declined by an average of 4.1% per year during the 2018-2023 period, losing a 1.3% market share of world imports. While the overall apparel industry recovered well from COVID-19 in

2021, the UK's apparel imports as well as exports experienced negative growth in the same year, coinciding with Brexit. In 2022 and 2023 however, imports have recovered, while exports have continued to fall. Compared to 2018, the importance of Germany, Spain and France for UK apparel exports declined, while that of Italy and the Netherlands improved.

Prior to Brexit, the United Kingdom's sourcing was already quite geographically spread. Since Brexit this has diversified further, moving away from European imports. In 2018, five European countries (Italy, Germany, the Netherlands, France and Spain) were ranked within the top 10 exporters to the UK. In 2023, only Italy remained on this list. Developing countries Vietnam, Pakistan, Sri Lanka and Morocco have all moved into the top 10. Türkiye has retained its position at number 3.

Table 6: Top 6 EU importers of apparel, 2023; average unit price comparison Intra EU and developing countries.

	Apparel imported from within the EU		Apparel imported from developing countries		Price difference (premium paid for apparel imported from the EU)
Country	Intra-EU average price 2023	Intra-EU 5-year price change	DC average price	5-year price change	
Germany	€9.87	+ €2.32	€4.87	+ €1.10	€5.00
France	€9.30	+ €2.57	€5.35	+ €0.82	€3.95
Spain	€11.22	+ €3.52	€5.20	+ €0.49	€6.02
The Netherlands	€13.99	+ €5.26	€4.36	+ €0.99	€9.63
Italy	€10.7	+ €2.10	€5.04	+ €0.82	€5.66
Poland	€9.31	+ €2.29	€2.50	+ €0.57	€6.82

Source: Eurostat 2023. Calculated by dividing value by volume.

Germany is the largest apparel market in the European Union

Germany is Europe's largest importer of apparel with a total import value in 2023 of €38.94 billion, of which 49.4% is intra-EU imports and 50.6% is extra-EU imports. In the 2018-2023 period, the value of intra-EU imports grew by an average of 6.9% per year, while extra-EU imports grew by just 1.5% (compared to an overall import growth of 4%). The larger increase of intra-EU imports highlights the growing trend of importing apparel from other European countries such as Poland and the Netherlands.

Table 7: Germany apparel imports: value, volume, growth

2023 Imports in value (€)	5-year average annual growth (%)	2023 imports in volume (units)	5-year average annual growth (%)
€38.9 billion	4%	5.9 billion	-1.8%

Source: Eurostat 2023

Table 8: Germany apparel imports: major exporters

Major exporters (% share)
Poland (12.7%), China (12.3%), Bangladesh (11.6%), the Netherlands (9%), Türkiye (8.1%), Italy (5.6%)
Top developing country exporters (% share)
China (12.3%), Bangladesh (11.6%), Türkiye (8.1%), Vietnam (2.6%), India (2.4%), Pakistan (2.2%)

Source: Eurostat 2023

Germany gets 49% of its imports from developing countries by value (and 66.4% by volume). China is the largest developing country exporting to Germany. However, China's share declined by 3.4% between 2018 and 2023. Poland has increased its share of imports by 4.2% and is now the biggest (re)exporter of apparel to Germany, overtaking China in the past year.

Germany is a country with strict and/or more and more sustainability and circularity requirements, driven by national legislation and policies. Some German legislation regarding harmful chemicals goes beyond [EU REACH](#) legislation. The country also has its own social and environmental standard, the [Grüner Knopf](#) label, which is displayed on garments at point of sale. Although investment in chemicals management and certification is required, it will provide opportunities in the coming years for higher quality and sustainable products in line with overall segment trends.

According to [Statista](#), the German apparel market is expected to grow annually by 1% in the next four years.

Leading apparel brands in Germany include [Hugo Boss](#), [Adidas](#), [Escada](#), [Tom Tailor](#), [Jil Sander](#), [Joop!](#) and [PUMA](#).

Leading apparel retailers in the country include [Zalando](#), [C&A](#), [H&M](#), [Peek & Cloppenburg](#), [Kik](#), [New Yorker](#), [Takko](#), [S.Oliver](#).

France is a volume market with increasing sustainability requirements

France is Europe's second-largest importer of apparel with a 2023 total import value of €25.7 billion, of which 52.3% is intra-EU imports and 47.7% is extra-EU imports. France gets 43.3% of its imports by value from developing countries (and 58.6% by volume), which is less than most other top Western European markets. Intra-EU imports grew at an average yearly rate of 1.4%. That is higher than the overall rate of 2.6% in the 2018-2023 period. Imports from outside the EU and from developing countries grew at 1.3% and 0.5% less than the overall rate respectively.

China is the largest apparel exporter to France. However, China's share of French imports declined by 1.8% in the 2018-2023 period, while the share of Bangladesh increased by 1.1%, and Türkiye's share declined by 0.9%.

Table 9: France apparel imports: value, volume, growth

2023 imports in value (€)	5-year average annual growth	2023 imports in volume (units)	5-year average annual growth
€23.7 bn	2.6%	3.2 bn	-2.1%

Source: Eurostat 2023

Table 10: France apparel imports: major exporters

Major exporters (% share)
China (14.4%), Italy (12.7%), Germany (8.8%), Spain (8.7%), Bangladesh (8.4%), Belgium (7.8%)
Top developing country exporters (% share)
China (14.4%), Bangladesh (8.4%), Türkiye (3.6%), Tunisia (3.6%), India (3%), Morocco (2.3%)

Source: Eurostat 2023

France can be described as a highly competitive volume market. Amongst the top 6 importers, France pays the lowest price for intra-EU imports and has the lowest price differential between intra-EU imports and developing country imports.

The country has stepped up its legislation regarding sustainability in recent years, in particular the regulation of chemicals. It is now a legal requirement in France to inform customers about products that contain one or more substances on the REACH Substances of Very High Concern (SVHC) list at point of sale. France is the first EU country to put into place specific regulations for MOSH/MOAH, mineral oils often used in printing inks for packaging materials and recycled paper. A new [law](#) has been approved that would impose financial penalties on 'ultra-fast fashion' companies to offset their environmental impact.

According to [Statista](#), the French apparel market is expected to grow annually by 1.16% in the next four years.

Leading apparel brands in France include [Louis Vuitton](#), [Chanel](#), [Dior](#), [Givenchy](#), [Yves Saint Laurent](#), [Balenciaga](#), [Hermès](#), [Balmain](#), and [Lacoste](#).

Leading apparel retailers in the country are [Amazon](#), [Decathlon](#), [Galeries Lafayette](#), [Kiabi](#), [La Halle](#), [Camaieu](#), [C&A](#), [H&M](#) and many more.

Spain is home to some of the largest international retailers in Europe

Spain is Europe's third-largest importer of apparel with a 2023 total import value of €19.1 billion, of which 35.5% is intra-EU imports and 64.5% is extra-EU imports. Spain gets as much as 63.6% of its imports by

value from developing countries (and 79.2% by volume). Between 2018 and 2023 however, the value of intra-EU imports grew by as much as 9.5%, which is 6.3% higher than the overall average import growth rate of 3.2%. Extra-EU imports, on the other hand, grew by just 0.5%, which is 2.7% less than the overall average for the same time period. Spain recorded the highest decline in its share of apparel purchased from developing countries of the top 10 importers (8.2%).

Table 11: Spain apparel imports: value, volume, growth

2023 imports in value (€)	5-year average annual growth	2023 imports in volume (units)	5-year average annual growth
€19.1 billion	3.2%	2.9 billion	-0.8%

Source: Eurostat 2023

Table 12: Spain apparel imports: major exporters

Major exporters (% share)
Bangladesh (15.6%), China (15%), Türkiye (8.4%), Italy (7.8%), Morocco (7.3%), France (6.3%)
Top developing country exporters (% share)
Bangladesh (15.6%), China (15%), Türkiye (8.4%), Morocco (7.3%), Cambodia (4.4%), Pakistan (3.8%)

Source: Eurostat 2023

Bangladesh is the largest exporter to Spain, followed by China. Bangladesh’s share of Spanish imports increased by almost 5.3% between 2018 and 2023, while China’s increased by just 1%, compared to an overall import growth of 3.2%. Much of Spain’s imports can be attributed to a few large budget to middle market international fast-fashion retailers. Import statistics do not reflect domestic consumption, which is relatively low, with Spain having a relatively low [GDP](#) and [average wages](#).

According to [Statista](#), Spain’s apparel market is expected to grow annually by 0.6% in the next four years.

Leading apparel brands in Spain include [LOEWE](#), [DELPOZO](#), [Adolfo Dominguez](#), [Desigual](#), [Bimba y Lola](#), [L’Envers](#), [Ecoalf](#), [SKFK](#), and [Ecoology](#).

Leading apparel retailers in the country [El Corte Inglesgroup](#), [Mango](#), [Tendam](#), [Zara](#), [Stradivarius](#), [Bershka](#), [Massimo Dutti](#), [Pull & Bear](#), [Oysho](#), and many more.

Italy is a large market for value-added products

Italy is Europe’s fourth-largest importer of apparel with a 2023 total import value of €18 billion, of which 50.9% is intra-EU imports and 49.1% is extra-EU imports. Italy purchases 44.7% of its apparel from developing countries by value (and 64.9% by volume). The share of intra-EU imports increased by 6.5%

between 2018 and 2023, while the share of developing country imports declined by a similar amount.

Table 13: Italy apparel imports: value, volume, growth

2023 imports in value (€)	5-year average annual growth	2023 imports in volume (units)	5-year average annual growth
€18 billion	5%	2.4 billion	0.1%

Source: Eurostat 2023

Table 14: Italy apparel imports: major exporters

Major exporters (% share)
China (12.9%), Spain (10.2%), France (9.2%), Bangladesh (8.4%), the Netherlands (6.9%), Germany (5.9%)
Top developing country exporters (% share)
China (12.9%), Bangladesh (8.4%), Romania (4.8%), Türkiye (3.5%), Tunisia (3.5%), Sri Lanka (2.5%)

Source: Eurostat 2023

Apparel is a well-established industry in Italy with a long tradition of combining knowledge, technological research and creativity in the production of quality garments made from high quality fabrics. Italian excellence in apparel manufacturing covers the entire supply chain from spinners, knitters, weavers, laboratories, dyers to machine manufacturers.

Many high-end Italian brands choose to produce closer to home for monitoring purposes as well as to collaborate with their partners on design and fabric quality. While China is still the largest exporter of apparel to Italy by value, its share declined by as much as 4.4% in the 2018-2023 period. Both the Netherlands and Spain increased their shares by approximately 3% during the same period.

According to [Statista](#), the Italian apparel market is expected to grow annually by 0.18% in the next four years.

Leading apparel brands in Italy include [Prada](#), [Zegna](#), [Dolce & Gabbana](#), [Valentino](#), [Salvatore Ferragamo](#), [Versace](#) and [Gucci](#).

Leading apparel retailers in the country are [Yoox](#), [Benetton](#), [Calzedonia](#), [H&M](#), [Max Mara](#), [Teddy](#), [Rinascente](#), and many more.

The Netherlands is a key European distribution hub

The Netherlands is Europe’s fifth-largest importer of apparel products with a 2023 total import value of €17.3 billion, of which 38.4% is intra-EU imports and 61.6% is extra-EU imports. Between 2018 and 2023, while the overall Netherlands import market grew by 2.9%, the intra-EU market grew by 5.4% and the extra-EU market grew by 1.5%.

The Netherlands gets 58.4% of its imports from developing countries by value (and 82.5% by volume). China’s share of the Netherlands’ exports is the highest amongst all top 6 importers at as much as 20% of the value. This presents an opportunity as the Netherlands is diversifying its purchasing and moving away from China. China and Bangladesh both lost market share between 2018 and 2023 (2.8% and 3.3% respectively) while Poland, Türkiye and Vietnam increased their market share (by 3.4%, 1.8% and 1.5% respectively).

Amongst the top importers, the Netherlands pays the highest premium by far for intra-EU apparel imports compared to those from developing countries (€9.63 price differential).

Table 15: The Netherlands apparel imports: value, volume, growth

2023 imports in value (euro)	5-year average annual growth	2023 imports in volume (units)	5-year average annual growth
€17.3 billion	2.9%	2.8 billion	-3.8%

Source: Eurostat 2023

Table 16: The Netherlands apparel imports: major exporters

Major exporters % share of exports
China (20%), Germany (16.8%), Bangladesh (10.8%), Türkiye (8.3%), Vietnam (4.3%), Belgium (4.1%)
Top developing country exporters (% share)
China (20%), Bangladesh (10.8%), Türkiye (8.3%), Vietnam (4.3%), India (3.2%), Cambodia (2.3%)

Source: Eurostat 2023

The Netherlands benefits from a favourable business climate which facilitates importing and exporting. This combined with the importance of the country’s seaports makes the Netherlands an ideal avenue for product import into Europe. Many foreign established brands have their headquarters in the Dutch capital, including Nike, Karl Lagerfeld and Tommy Hilfiger.

The Netherlands is home to a strong community of industry support organisations mainly centred around sustainability issues, including [Fashion for Good](#) (an innovation platform and accelerator for fashion start-ups), [MODINT](#) (trade association) and non-profit alliance [Cascale](#).

According to [Statista](#), the Netherlands’ apparel market is expected to grow annually by 2.11% in the next four years; the second highest rate of the top 6 countries after Poland.

Leading apparel brands in the Netherlands are [Daily Paper](#), [Patta](#), [POM Amsterdam](#), [Suitsupply](#), [Studio Anneloes](#), [Fabienne Chapot](#), [My Jewellery](#), [Laundry Industry](#) and [Viktor & Rolf](#).

Leading apparel retailers in the country are [G-Star](#), [WE](#), [C&A](#), [H&M](#), [Zalando](#), and many more.

Poland is the fastest growing economy in Europe

Poland has become Europe’s 6th largest importer of apparel with a 2023 total import value of €12.5 billion, of which as much as 69% is intra-EU imports and 31% is extra-EU imports (by value). Between 2018 and 2023 Poland’s imports experienced high average annual growth (12.3%), in line with its economic expansion.

Germany is by far the largest exporter of apparel by value to Poland with a 32.3% share. However, Germany’s share declined by as much as 8.9% per year in the 2018–2023 period and represented just 16.6% by volume in 2023 (down by 5% in the past 5 years). Poland is starting to develop its purchasing network and reducing its reliance on intra-EU imports. The share of Poland’s intra-EU imports declined by almost 1% in the same period while the share of developing country imports increased by 2.4%.

With a low [GDP](#) and low [wages](#), and lagging behind Western Europe in terms of sustainability, Poland is not yet a suitable market for more value-added or sustainable products. The average price paid for apparel products purchased from developing countries is extremely low at just €2.50 per unit. Poland’s importers are paying a high premium for intra-EU imports compared to developing countries (€6.82 price differential). These statistics may reflect the fact that Poland’s purchasing is not well-established and makes use of more indirect distribution channels for a more complicated product.

In the future, as Poland’s economy continues to expand and domestic brands establish themselves, it is expected that Poland will continue to increase its imports from developing countries which have already increased significantly (14.2%) annually in the past five years. With a 2023 share of just 30.8% by value (and 62.5% by volume), developing country exporters will have opportunities to increase exports of more value-added products to Poland in the short and medium term.

According to [Statista](#), the Polish apparel market is expected to grow by 4.73% annually in the next four years.

Poland’s largest clothing manufacturer is [LPP](#) with its umbrella of brands and retailers including [Reserved](#), [Cropp](#), [House](#), [Mohito](#) and [Sinsay](#). Other important retail chains include [CCC](#) and [SMYK](#).

Table 17: Poland apparel imports: value, volume, growth

2023 imports in value (euro)	5-year average annual growth	2023 imports in volume (units)	5-year average annual growth
€12.5 bn	12.3%	2.4 billion	7.3%

Source: Eurostat 2023

Table 18: Poland apparel imports: major exporters

Major exporters (% share)
Germany (32.3%), Spain (11%), Bangladesh (10.8%), China (8.1%), the Netherlands (5.6%), Türkiye (4.2%)
Top developing country exporters (% share)

Bangladesh (10.8%), China (8.1%), Türkiye (4.2%), Myanmar (3.3%), India (1.3%), Pakistan (1%)

Source: Eurostat 2023

Tips:

Study business moral, end consumer preferences regarding design and fit and price-level before investing in entering Poland as a new market.

When starting your business, start small, and take the time to get to know your buyers and learn about market requirements.

4. Which products from developing countries have most potential on the European apparel market?

Trousers and shorts, knitwear, outerwear and T-shirts are the most common product categories that developing countries export to the EU. Together, these four categories have a value of €44.5 billion (2023), which amounts to almost 57% of all apparel exports from developing countries to the EU.

- The fastest-growing category exported by developing countries is sports and activewear, followed by jackets and blazers and dresses and skirts;
- The import of shirts and blouses and babywear categories, on the other hand, is declining;
- China's market share in European outerwear imports declined by as much as 11.5%, which presents opportunities for developing country suppliers;
- China's share also declined by more than 5% for the knitwear, jackets and blazers, babywear and sports and activewear categories.

Table 19: EU imports from developing countries by product category; price developments; top exporters

Product category	Value 2023	5-year average growth	2023 average price	5-year price change	Top developing country exporters (market share change 5-year)
Trousers and shorts	€17.6 bn	2.40%	€6.80	€1.51	Bangladesh (1.6%), China (-3.1%), Türkiye (0.4%), Pakistan (1.1%), Cambodia (-1%), Tunisia (0.2%)

Knitwear	€10.5 bn	2.70%	€7.00	€1.39	China (-6.4%), Bangladesh (2.5%), Türkiye (1.2%), Cambodia (-1.4%), Pakistan (1.5%), Vietnam (1.1%)
Outerwear	€8.3 bn	1.10%	€16.14	€3.18	China (-11.5%), Bangladesh 2.4%), Myanmar (3.2%), Vietnam (1.7%), Cambodia (1.7%), Türkiye (1.3%)
T-shirts	€8.1 bn	1.50%	€2.83	€0.61	Bangladesh (5.3%), Türkiye (-2.3%), China (-1.4%), India (-2.2%), Vietnam (1.7%), Morocco (-0.3%)
Shirts and blouses	€6.4 bn	-1.20%	€6.82	€1.67	Bangladesh (4.2%), China (-1.8%), Türkiye (-1%), India (-1.1%), Morocco (-0.7%), Vietnam (0.4%)
Dresses and skirts	€5.7 bn	5.40%	€8.43	€2.16	China (-0.6%), Türkiye (0.3%), India (2.3%), Bangladesh (1.2%), Morocco (-1.4%), Cambodia (-0.5%)
Underwear and nightwear	€5.6 bn	2.20%	€2.24	€0.51	China (-4.8%), Bangladesh (5.3%), Sri Lanka (1.4%), India (-1.1%), Türkiye (1%), Vietnam (0.1%)

Jackets and blazers	€2.6 bn	5.70%	€17.15	€4.00	China (-8.3%), Türkiye (1.2%), Bangladesh (3.4%), Morocco (0.6%), Vietnam (-0.1%), Tunisia (1.9%)
Babies wear	€1.7 bn	-1.00%	No data	No data	Bangladesh (3.8%), China (-5.9%), India (1.3%), Türkiye (1.2%), Cambodia (-0.5%), Myanmar (0.8%)
Sports and activewear	€1.5 bn	7.00 %	€5.75	€1.87	China (-7%), Vietnam (3.1%), Tunisia (-0.3%), Bangladesh (0.2%), Türkiye (3.3%), Cambodia (-0.9%)

Source: Eurostat 2023

Trousers and shorts

Between 2018 and 2023, the trousers category grew by an average of 2.4% each year. It makes up 22.5% of all European apparel imports from developing countries (stable since 2018). The average import unit price of trousers from developing countries is €6.80, having increased by €1.51 over the past five years.

This is a volume category. It should come as no surprise that Bangladesh is the largest developing country exporter with a 28.1% share, which has grown by 1.6% in the same period as above. Within this segment, denim is an important niche market. In 2023, denim trousers and shorts made up 21.7% of the total value of trousers and shorts imports to Europe from developing countries. The European Union is at the centre of global industry efforts to make denim (which is a very ‘dirty’ product category) more sustainable. From this point of view, denim is an interesting category to focus on.

For background information on trousers and practical guidance on exporting trousers to Europe, check the [CBI study on pants and trousers](#).

Knitwear

The knitwear category includes knitted or crocheted jerseys, pullovers, cardigans and waistcoats. Knitwear makes up 13.3% of all European apparel imports from developing countries (and has been stable since 2018) and has grown on average by 2.7% each year between 2018 and 2023. The average import unit price of knitwear from developing countries is €7, up by €1.39 compared to 5 years ago.

Figure 7: Knitwear imports account for more than 13% of all European apparel imports from developing countries



Source: [Meg MacDonald](#) on [Unsplash](#)

China is still the largest developing country exporter with a significant but declining share of 31.9% of European imports, having declined by as much as 6.4% in the 2018-2023 period. The second-largest exporter is Bangladesh with a 26.8% share, an annual average increase of 2.5% since 2018.

Knitwear made from man-made fibres and cotton fibres have a roughly equal share of the market, accounting for 44.5% and 43.4% of the total value of knitwear imports to Europe from developing countries in 2023. While the share of knitwear made from man-made fibres declined by 4.4% on average per year in the 2018-2023 period, the share of cotton knitwear grew by 3.1%.

The use of organic cotton is becoming standard amongst premium brands and retailers, with the budget and middle segments starting to introduce organic cotton in smaller percentages.

In addition to using more sustainable fibre types such as organic cotton, hemp, linen and responsible wool, sustainability efforts in the knitwear industry are focused on recycled materials (especially cotton and wool), increasing production efficiency, shortening the manufacturing process and reducing knitting waste.

For background information on knitwear and practical guidance on exporting trousers to Europe, check the [CBI study on knitwear](#).

Outerwear

The outerwear category includes overcoats, car coats, cloaks, anoraks (including ski jackets), wind jackets and similar articles. Outerwear makes up 10.5% of all European apparel imports from developing countries (down from 11.2% in 2018) and has grown on average by 1.1% each year between 2018 and 2023. The average import unit price of outerwear from developing countries is €16.14, which represents a 5-year increase of €3.18, the second highest amongst the top 10 import categories from developing countries by value.

China is still the largest exporter from developing countries with a 46% share, but this has declined by 11.5% in the 2018-2023 period. The second-largest exporter is Bangladesh with a 12% share and an increase of 2.4% since 2018. The biggest share increase was for Myanmar (3.2%), which has become the third-largest exporter amongst developing countries. With production moving away from China and further potential for growth, outerwear offers opportunities for skilled manufacturers in other developing countries.

The outdoor segment (outerwear worn for outdoor activities) such as anoraks, ski jackets, wind jackets etc., is an interesting niche. A love for the outdoors and protection of the environment are central to the outdoor consumer as well as the interest in certain brands. As a result, the outdoor segment has been at the forefront of innovation and campaigning for increased environmental sustainability in products and processes, led mainly by Scandinavian brands.

As much as 78% of outerwear products imported into the EU from developing countries are made from man-made/synthetic fibres. Most outdoor jacket products make extensive use of synthetics to achieve higher performance functionality, which results in a significant negative environmental impact during production, use, and disposal. The sustainable outerwear market in particular has strong prospects for growth.

For background information on outerwear and practical guidance on exporting trousers to Europe, check the [CBI study on coats, jackets and blazers](#).

T-shirts

T-shirts make up 10.3% of all European apparel imports from developing countries (and has been relatively

stable since 2018) and the category has grown on average by 1.5% each year between 2018 and 2023. The average import unit price of a T-shirt from developing countries is €2.83, which represents a 5-year increase of €0.61.

Bangladesh is the largest developing country exporter with a 42.4% share, which represents an increase in share of 5.3% since 2018. Türkiye is the second largest with a 17.2% share, down from 19.5% in 2018. This segment is highly competitive. However, niches include T-shirts made using more sustainable fibres such as organic or recycled cotton as well as higher-end T-shirts using alternative fibres (e.g. linen) and/or knitted with finer yarns.

Sportswear and activewear

The sportswear and activewear category includes tracksuits, ski suits and swimwear. The category makes up 1.9% of all European apparel imports from developing countries (up from 1.5% in 2018) and has grown on average by 7% each year between 2018 and 2023, well above the overall apparel growth rate. This is the result of an increase in health and wellness priorities amongst consumers in Europe as well as remote working.

The average import unit price of sportswear and activewear from developing countries is €5.75, which represents a 5-year increase of €1.87. China is the largest developing country exporter with a 38.8% share (down from 45.8% in 2018). Vietnam and Türkiye have both gained about 3% market share.

The global sportswear market is expected to [grow](#) from US\$193 billion in 2023 to US\$305 billion in 2030.

The promotion of sustainable and healthy lifestyles is a key part of the brand identity of sportswear and activewear brands in Europe. Petroleum-based synthetic materials and performance finishes are widely used in this segment and there is a lot of motivation for the development and use of more sustainable high-tech performance fabrics.

For background information on sportswear and practical guidance on exporting trousers to Europe, check the [CBI study on sportswear](#).

Dresses and skirts

Dresses and skirts make up 7.4% of all European apparel imports from developing countries (up by 1% since 2018) and the category has grown on average by 5.4% each year between 2018 and 2023. The average import unit price of a dress or skirt from developing countries is €8.43, which represents a 5-year increase of €2.16.

China is still the largest exporter from developing countries with a 36.3% share (down just 0.6% since 2018). Türkiye is the second largest with a 17.1% share, up from 16.8% in 2018. India ranks third with a 13.2% share (up by 2.3% since 2018). Wovens make up 66% of this category with synthetic/artificial fibres, accounting for as much as 63.6% compared to cotton, which accounts for 26%.

[FT Journalistiek](#) carried out this study in partnership with Frans Tilstra and Giovanni Beatrice on behalf of CBI.

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