The European market potential for fashion sportswear

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Europe is a strong market for fashion sportswear, with a total import value of €11.7 billion and an average growth of 4.6% between 2016 and 2021. The biggest markets are Germany, France, Italy, Spain, the Netherlands and Poland. Non-knitted anoraks make up the largest product subsegment by far, accounting for 73.9% of the total, followed by knitted anoraks, knitted tracksuits and non-knitted tracksuits.

55% of EU citizens engage in sport (Eurobarometer 2022), and 38% do so at least once per week. Northern Europeans play the most sports. Sportswear and fashion sportswear are apparel segments that fit well with emerging environmentally-friendly standards. The sector focuses on the use of safer, more sustainable materials.

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1. Product description

Sportswear is designed for activity and physical exercise. It uses technical fabrics and garment designs that allow for better performance, moveability, comfort and safety. Functionality refers to thermal regulation (wicking, insulation, breathability, ventilation), protection from the elements (water resistance, wind resistance, anti-UV), easy care (anti-odour, anti-bacterial), light-weight, high stretch, anti-chafing, quick drying, seamless and four-way stretch. Fashion sportswear refers to apparel that combines elements of sportswear with fashion.

Fashion sportswear can be further segmented as follows:

- Branded or luxury sportswear: Maintains traditional sportswear aesthetics and a high level of functionality.
- Athleisure wear: Comfortable, casual clothing that can be worn for both workouts and everyday activities.
- Urban athleisure: Sportswear-inspired streetwear that prioritises fashion over function.

There is no specific trade data that can give a detailed picture of trade in fashion sportswear. However, we can understand fashion sportswear trends by analysing trade data for two key categories of apparel:

- Anoraks: includes knitted and non-knitted windcheaters, wind jackets and similar articles, made from cotton, man-made fibres and other materials (HS codes 61012090, 61013090, 61019090, 62019200, 62019300, 62019900, 61022090, 61023090, 61029090, 62029090, 62029200, 62029300, 62029900).
- Track Suits: includes knitted and non-knitted, lined and non-lined tops and bottoms made from cotton, man-

made fabrics and other materials (HS codes 61121100, 61121200, 61121900, 62113231, 62113241, 62113242, 62113331, 62113341, 62113342, 62114231, 62114241, 62114242, 62114331, 62114341, 62114332).

2. What makes Europe an interesting market for Fashion Sportswear?

Europe is one of the largest importers of fashion sportswear in the world. In 2021, the value of fashion sportswear imports to Europe was €11.7 billion (€9.38 billion in 2016). This corresponded to about 725 million pieces of fashion sportswear clothing in 2021 (636 million in 2016). Between 2016 and 2021, the value of the EU's fashion sportswear imports grew by 4.6% each year, on average.

Demand will likely keep growing because all age groups of the European population are shifting towards adopting healthy, active lifestyles with increased sports participation. Sportswear is also gaining popularity as an extension of casualwear in fashion.

Source: Eurostat 2022

The EU is also a large re-exporter of fashion sportswear apparel. In 2021, it exported €9.25 billion worth of fashion sportswear apparel (up from €6.07 billion in 2016). This corresponded to roughly 361.3 million units of fashion sportswear items in 2021 (274.3 million in 2016). EU fashion sportswear exports have been growing at an average yearly rate of 8.8% between 2016 and 2021 – almost double the rate of imports.

Source: Eurostat 2022

The biggest EU exporters in 2021 were Germany (€1.97 billion), Italy (€1.82 billion), the Netherlands (€999.5 million), Belgium (€724.4 million), Spain (€708 million) and Poland (€699.9 million). Together, these six countries represent around 75% of the EU's fashion sportswear apparel exports. Poland and Italy have seen the strongest export growth within this group with an average yearly increase of 20.1% and 11.8% over the five-year period, respectively.

Source: Eurostat 2022

In 2021, fashion sportswear imports from within the EU accounted for as much as 52.9% of the value of European fashion sportswear imports, up from 42.7% in 2016. Developing country suppliers accounted for 45.6% of all fashion sportswear imports into the European Union in terms of value (down from 53.6% in 2016). The value of EU fashion sportswear imports from developing countries corresponded to €5.36 billion in 2021 and has increased at an average yearly rate of 1.3% since 2016. Prices remained stable.

During the same period, fashion sportswear imports from within the EU increased at a rate of 9.2%, and the average per unit price increased by €3.10. The data suggests a growing interest in intra-EU trade and premium, value-added products. This data, however, hides the fact that a portion of intra-EU trade comes from products originally manufactured by developing country suppliers. As such, this portion is not in direct competition with imports from developing countries.

Trade with developing countries is expected to continue to grow in the future, creating new opportunities. Five of the top six intra-EU exporters also rank within the top six importers of fashion sportswear, indicating that certain EU countries are becoming more important as regional distribution hubs.

Table 1: Top ten Extra EU fashion sportswear exporters to the European Union, 2021 EUR value, five-year growth, market share (of Extra EU exporting countries)

Country	Share of extra-EU exports	Share of total export to EU	5-year average annual growth	Value in euros
China	46.9%	22.1%	-3.6%	€2.59 b
Bangladesh	13.4%	6.3%	11.0%	€742.2 m
Vietnam	10.1%	4.8%	2.4%	€559.9 m
Myanmar	7.6%	3.6%	23.0%	€423.4 m
Cambodia	4.5%	2.1%	6.0%	€249.7 m
Turkey	3.4%	1.6%	17.1%	€189.6 m
Pakistan	2.2%	1.0%	9.2%	€123.4 m
Indonesia	2.2%	1.0%	-2.6%	€121.2 m
United Kingdom	1.1%	0.5%	-23.7%	€63.3 m
Morocco	1.0%	50.0%	-3.8%	€57.4 m

Source: Eurostat 2022

China, Bangladesh and Vietnam dominate Europe’s fashion sportswear imports from outside the EU. Together, they account for 70% of all extra-EU fashion sportswear imports into the EU or 33.2% of the total imports (including intra-EU trade). China is the largest fashion sportswear exporter to the EU, making up 22.1% of the total EU import value in 2021 (€2.59 billion). Bangladesh is second with 6.3% and Vietnam third with 4.8%.

As China shifts its focus towards higher value manufacturing, the market is responding by looking to other production countries. This creates opportunities for manufacturers in developing countries. While imports from outside the EU grew by 0.6% between 2016 and 2021, on average, imports from China, Morocco and Indonesia declined (by 3.6%, 3.8% and 2.6%, respectively). Exports from Myanmar, Turkey and Bangladesh grew during the same period by 23%, 17.1% and 11%, respectively.

Table 2: Top ten intra-EU fashion sportswear exporters to the European Union, 2021 EUR value, five-year

growth, market share (of Extra EU exporting countries)

Country	Share of Intra- EU export	Share of total export to EU	5-year average annual growth	Value in euros
Germany	26.3%	13.9%	9.8%	€1.62 b
Poland	11.5%	6.1%	25.9%	€717.8 m
Italy	11.1%	5.8%	10.1%	€687.9 m
Netherlands	10.4%	5.5%	6.4%	€648.6 m
Belgium	9.0%	4.8%	8.3%	€560.4 m
Spain	8.0%	4.2%	6.1%	€498.2 m
France	5.6%	3.0%	5.8%	€347.5 m
Denmark	3.8%	2.0%	2.1%	€235.5 m
Czechia	3.0%	1.6%	8.9%	€186.2 m
Romania	2.3%	1.2%	6.8%	€142.8 m

Source: Eurostat 2022

The fashion sportswear trade within the EU is dominated by Germany, Poland, Italy and the Netherlands. Together, these three countries account for 31.4 % of all fashion sportswear imports into the EU (from both inside and outside the EU). While intra-EU imports overall experienced an average growth rate of 9.2% between 2016 and 2021, imports from Germany, Poland and Italy all grew at a higher rate, with Poland achieving 25.9% growth.

European fashion sportswear imports grow faster than fashion imports

On average, overall European apparel imports grew by just 3.2% per year between 2021 and 2023. However, fashion sportswear imports grew by 8% during the same period. According to Statista, the European Sportswear market is expected to grow from approximately US $77 billion in 2021 to just under US $100 billion by 2027.

3. Which European countries offer the most opportunities for fashion sportswear?

Western European markets are much larger and better developed than Central and Eastern European markets. The top fashion sportswear import markets in the EU are Germany, France, Italy, Spain, the Netherlands and Poland. Together, these six countries account for 72% of fashion sportswear imports in the EU and grew at an average rate of 4.2% per year between 2016 and 2021.

Table 3: Top ten EU importers of fashion sportswear, 2021 value; average annual growth; developing country share of imports; developing country imports average annual growth; developing country imports price developments

	Value 2021 in EUR	Average annual growth	Dev. country share 2021	Dev. country imports average annual growth	Dev. country imports change in share 2016-2021	Dev country imports average price 2021 in EUR
Germany	€2.77 b	3.3%	52.10%	-1.20%	-12.80%	€12.44
France	€1.34 b	2.9%	40.40%	3.10%	0.40%	€12.86
Italy	€1.31 b	2.5%	57.30%	-0.70%	-9.90%	€19.04
Spain	€1.09 b	2.4%	64.10%	1.90%	-1.60%	€9.45
Netherlands	€983 m	3.6%	55.40%	-0.80%	-13.60%	€15.37
Poland	€953.5 m	19.3%	28.50%	20.40%	1.30%	€8.35
Belgium	€614.6 m	4.2%	56%	0.50%	-11.00%	€14.29
Austria	€506.8 m	6.0%	9.40%	4%	-0.80%	€7.90
Sweden	€392.1 m	5.6%	51.10%	4.40%	-3.00%	€16.50
Denmark	€339.4 m	3.1%	65.70%	1.40%	-5.50%	€12.39

EU Total	€11.7 b	4.6%	45.60%	1.30%	-7.90%	€12.20

Source: Eurostat 2022

Of the top ten importers, Denmark and Spain stand out in terms of developing countries that source fashion sportswear, with 65.7% and 64.1% shares of imports from developing countries, respectively. Poland has grown its imports from developing countries by an average of 20.4% in the 2016-2021 period. Poland and France are the only countries whose average annual growth in imports from developing countries is higher than the overall import growth, indicating that these countries are increasing their sourcing from developing countries.

Source: Eurostat 2022

The average price of European imports of fashion sportswear from developing countries has remained stable, decreasing by just €0.10 during the 2016-2021 period.

Germany: Europe’s largest importer of fashion sportswear

In 2021, Germany imported €2.77 billion in fashion sportswear (up from €2.36 billion in 2016), or 166 million units of clothing. Between 2016 and 2021, the value of Germany’s fashion sportswear imports grew at an average rate of 3.3% per year (over one percentage point less than the EU average), while the import volume grew at 1.5% per year.

Table 4: 2021 imports of fashion sportswear products to Germany by segment with five-year growth, average import unit price and five-year price evolution

	Value 2021	Share 2021	5-year growth	Average unit price 2021	5-year price change
Tracksuits	€128.2 m	4.60%	5.20%	€11.83	-€0.26
Men’s or boys’ anoraks	€1.09 bn	39.60%	3.90%	€19.28	€0.17
Women’s or girls’ anoraks	€1.54 bn	55.80%	2.70%	€15.76	€2.04

Source: Eurostat 2022

Currently, Germany imports 52.1% of its fashion sportswear from developing countries (7.5% above the EU average). However, the value of Germany’s imports from developing countries decreased by an average of

1.2% per year, and developing countries' share of imports decreased by as much as 12.8% during the 2016-2021 period.

Women's or girls' anoraks account for 55.8% of Germany's fashion sportswear imports in terms of value. The total value of this category was €1.54 billion. The second-largest category is men's or boys' anoraks, which have a share of 39.6% and a total value of €1.09 billion. The highest growth category was tracksuits, which have an average annual growth rate of 5.6%.

Unit prices for anoraks are roughly in line with the EU average, while the unit price for tracksuits is about €1.75 higher. The average price paid for developing country imports (€12.44) is also just above the EU average. Women's and girls' anoraks prices are around 20% lower than those for men's and boys' anoraks but are increasing.

Germany has strict sustainability requirements, driven by national legislation and policies. Some German legislation regarding harmful chemicals goes beyond EU REACH legislation. It also has its own social and environmental standard, the Grüner Knopf label, which is displayed on garments at the point of sale. Although investment in chemicals management and certification is required, this will create opportunities in the coming years for higher quality and sustainable products.

China remains the top exporter to Germany, but its market share is around half the European average. It is also the only important exporter to Germany that declined between 2016 and 2021 (-5.9% per year). This shows that diversification away from China is already a well-established strategy. Outside China, important developing country exporters to Germany include Bangladesh, Vietnam, Cambodia and Myanmar.

These developments show that the high volume/lower price market is still strong for Germany, but there is also a large demand for flexible production and high quality, innovative products for which a high premium is paid.

The European Commission's Eurobarometer survey reports that 68% of Germans engage in exercise or play a sport, representing a level of participation well above the EU average of 55%.

The main sportswear brands in Germany include Adidas and Puma, Jako, Reusch, Schöffel, Ortlieb and Vaude.

Figure 5: Track suit tops are a staple in many Europeans' wardrobes

Source: Derek Randolph on Pexels

France: a volume market with increasing sustainability requirements

France is the second-largest market for fashion sportswear in Europe, with a value of €1.34 billion in 2021, up from €1.16 billion in 2016. This was equivalent to about 78.5 million units of clothing in 2021. Between 2016 and 2021, the value of France's fashion sportswear imports grew at an average rate of 2.9% per year, over 1.5% below the EU average, while the import volume grew by 0.5% per year.

During the same time frame, the value of imports from developing countries grew by 3.1% per year, on average. Fashion sportswear apparel from developing countries constitutes just 40.4% of France's imports, which – with the exception of Poland – is the lowest of the top six countries. However, after Poland, France has the highest rate of growth in developing country sourcing.

Table 5: 2021 imports of fashion sportswear products to France by segment with five-year growth, average import unit price and five-year price evolution

	Value 2021	Share 2021	5-year growth	Average unit price 2021	5-year price change

Tracksuits	€112.1 m	8.40%	0.90%	€11.13	-€0.01
Men's or boys' anoraks	€552.7 m	41.20%	4.70%	€23.34	€4.43
Women's or girls' anoraks	€676.4 m	50.40%	1.80%	€15.12	€1

Source: Eurostat 2022

Women's or girls' anoraks account for 50.4% of France's fashion sportswear imports in terms of value. The total value of this category was €676.4 million and it grew by an average of 1.8% per year between 2016-2021. The second-largest category is men's or boys' anoraks with a total value of €552.7 million. Men's and boys' anoraks grew by 4.7% in the 2016-2021 period. Tracksuits account for 8.4% of fashion sportswear imports in France.

France can be described as a highly competitive, volume apparel market. Although not the lowest of the top six markets, the average unit prices for women's or girls' anoraks and tracksuits are in line with the EU average. However, the unit price for men's or boys' anoraks increased to around €4.40 higher than the EU average over the 2016-2021 period. The average price paid for developing country imports (€12.86) is also just above the EU average.

China remains the top exporter to France with a 23.8% share. The other top four exporters are all EU countries (Germany, Italy, Spain and Belgium). Of the top manufacturing countries exporting to France, Bangladesh, Italy and Tunisia have experienced the highest growth, indicating that the high volume/lower price market is an increasingly strong segment for fashion sportswear. At the same time, we see increasing demand for flexible production and high-quality products.

France is stepping up its legislation regarding sustainability, and chemical legislation in particular. It is now a legal requirement in France to inform customers about products that contain at least one substance that features on the REACH Substances of Very High Concern (SVHC) list at the point of sale. It will become harder to comply with French buyer requirements, but we will also see increased demand for more sustainable products.

The European Commission's Eurobarometer survey reports that 55% of the French population engage in exercise or play sport, which is the same as the EU average.

The main sportswear brands in France include Lacoste, Lafuma, Eider, Oxbow, Le Coq Sportif, Rossignol, Decathlon and Aigle.

Italy: a luxury market and a global leader in design

Italy is the third-largest import market for fashion sportswear in the EU. In 2021, the value of its fashion sportswear imports was €1.31 billion (up from €1.16 billion in 2016), or roughly 60 million units of clothing. Between 2016 and 2021, the value of Italy's fashion sportswear imports increased at an average rate of 2.5% per year, 2% below the EU average, while the import volume increased by 0.3% per year.

Table 6: 2021 imports of fashion sportswear products to Italy by segment with five-year growth, average import unit price and five-year price evolution

	Value 2021	Share 2021	5-year growth	Average unit price 2021	5-year price change
Tracksuits	€120.7 m	9.20%	7.70%	€10.68	€1.15
Men’s or boys’ anoraks	€655.4 m	50.00%	2.50%	€26.76	€4.37
Women’s or girls’ anoraks	€535.5 m	40.80%	1.50%	€22.11	€1.79

Source: Eurostat 2022

Italy is the only top six importer where the category of men’s and boys’ anoraks is significantly larger than the women’s or girls’ category, accounting for 50% of the import value. Tracksuits saw the strongest growth (7.7%) in the 2016-2021 period. Unit prices increased across all three categories during the same period.

Italy’s sourcing from developing countries is well established, and it is second only to Spain in terms of share of imports, despite a slight decline between 2016 and 2021. Italy sources from many different countries. Even its top exporting countries, Bangladesh, China and Cambodia, only have market shares of 1.2 to 1.4%. Despite this, the average price paid for developing country imports is the highest amongst the top six, at €19.04, which reflects the activity of Italy’s luxury brands in this segment.

In general, Italian apparel focuses more on aesthetics, design and fit than on sustainability. However, this is likely to change in the future as stricter EU regulations come into force.

The European Commission’s Eurobarometer survey reports that only 44% of Italians engage in exercise or play sport, representing a level of participation well below the EU average of 55%.

The main sportswear brands in Italy include Fila, Kappa, Lotto, Diadora, Errea, Legea and Macron.

Spain: a budget market that is home to some of the largest international retailers in Europe

Spain is the fourth-largest import market for fashion sportswear in the EU. It imported €1.09 billion of fashion sportswear in 2021 (up from €974.2 million in 2016), or around 91.3 million units of clothing.

Between 2016 and 2021, the value of Spain’s fashion sportswear imports grew at an average rate of 2.4% per year (more than 2% below the EU average), while the import volume grew at 1.3% per year. During the same period, the value of imports from developing countries grew by an average of 1.9% per year, with developing country exports constituting as much as 64.1% of Spain's imports in this product segment. This is the highest share among the top six by far.

Table 7: 2021 imports of fashion sportswear products to Spain by segment with five-year growth, average import unit price and five-year price evolution

	Value 2021	Share 2021	5-year growth	Average unit price 2021	5-year price change
Tracksuits	€99.6 m	9.10%	2.70%	€12.05	€3.22
Men's or boys' anoraks	€413.4 m	37.70%	0.60%	€13.09	€1.33
Women's or girls' anoraks	€583.1 m	53.20%	3.80%	€11.32	-€0.31

Source: Eurostat 2022

Women's or girls' anoraks account for 53.2% of Spains fashion sportswear imports in value terms, up from 49.8% in 2016. The total value of this category was €583.1 million in 2021 and it grew by 3.8% on average between 2016 and 2021. The second-largest category is men's or boys' anoraks with a total value of €413.4 million and an 0.6% average growth rate.

Many of Spain's imports are destined for a few large international fast-fashion retailers. The import statistics may not reflect the relatively low performance of the country's local market. Prices paid by Spain's importers are among the lowest of the top importing countries. Unit prices for men's or boys' anoraks and women's or girls' anoraks are lower than the EU average by as much as €5.87 and €4.29, respectively. Unit prices for tracksuits, however, are almost €2 higher than the EU average, having increased by €3.22 between 2016 and 2021.

The top exporters of fashion sportswear to Spain are China, Bangladesh and Myanmar. While imports from China decreased (by 7.1% on average per year) between 2016 and 2021, imports from the low-cost manufacturing countries Bangladesh and Myanmar grew to 12.8% and 49.3%, respectively.

The European Commission's Eurobarometer survey reports that 53% of the Spanish population engages in exercise or plays sport, just below the EU average of 55%.

The main sportswear brands in Spain include Joma, Kelme and Luanvi.

The Netherlands: a distribution hub and European centre for sustainability initiatives

The Netherlands is the fifth largest importer of fashion sportswear in the EU, with a value of €983 million in 2021, up from €822.3 million in 2016. This represented around 54.5 million units of clothing in 2021. Between 2016 and 2021, the value of Dutch fashion sportswear imports grew at an average rate of 3.6% per year, while the import volume decreased by 0.8% per year. During the same period, the value of imports from developing countries decreased by an average of 0.8% per year and developing countries lost 13.6% market share.

Table 8: 2021 imports of fashion sportswear products to the Netherlands by segment with five-year growth, average import unit price and five-year price evolution

	Value 2021	Share 2021	5-year growth	Average unit price 2021	5-year price change
Tracksuits	€54.4 m	5.5%	12.9%	€12.89	€1.57
Men’s or boys’ anoraks	€468.8 m	47.7%	4.6%	€20.65	€3.80
Women’s or girls’ anoraks	€459.7 m	46.8%	1.9%	€16.66	€3.55

Source: Eurostat 2022

The men’s or boys’ anoraks and women’s or girls’ categories account for a roughly equal share of the market (47.7% and 46.8%, respectively). While all three categories within the fashion sportswear segment experienced growth during the 2016-2021 period, the fastest-growing import category was tracksuits, achieving an average growth rate around 3.5 times that of the overall segment (12.9% per year).

China is the Netherlands’ biggest supplier of fashion sportswear, with a 30% market share, even though its exports to the Netherlands declined by 5.8% between 2016 and 2021. Developing countries that are picking up China’s business include Vietnam, Bangladesh and Myanmar.

The fashion sportswear market in the Netherlands is focused on premium rather than luxury European or budget goods. Unit prices paid by the Netherlands for developing country imports are lower only than those paid by Italy. The premium paid for intra-EU imports (€6.38) is the lowest among the top six importers and is around €3.40 less than the EU average.

The Netherlands benefits from a favourable business climate that facilitates importing and exporting. This, combined with its proximity to the sea and availability of harbours, means it is ideal for import into Europe. For this reason, many foreign established apparel brands have their headquarters in the Dutch capital, including sportswear giant Nike.

The Netherlands aims to have a circular economy by 2050 and is adopting ambitious policies and incentives to achieve this. The country aims to achieve the following by 2030:

- All textile products should contain 50% sustainable materials of which at least 30% is recycled content;
- 50% of post-consumer material is recycled.

These targets provide incentives for Dutch brands and retailers to give preferential treatment to suppliers that source recycled materials and have development capabilities.

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 Sustainable Apparel Coalition (renamed Cascale in 2024).

The European Commission's Eurobarometer survey reports that 75% of the Dutch population engages in exercise or plays sport, well above the EU average of 55%.

The main sportswear brands in the Netherlands include Robey, Quick and Hi-Tec.

Poland – fastest growing economy in Europe

Poland ranks number six in EU fashion sportswear imports, with a value of €953.5 million in 2021, up from €395 million in 2016. This represented about 68.5 million units of clothing in 2021. Between 2016 and 2021, the value of Poland's fashion sportswear imports grew at an average rate of 19.3% per year, more than four times the EU segment growth rate, while the import volume increased by 15.5% per year.

Table 9: 2021 imports of fashion sportswear products to Poland by segment with five-year growth, average import unit price and five-year price evolution

	Value 2021	Share 2021	5-year growth	Average unit price 2021	5-year price change
Tracksuits	€27.9 m	2.9%	12.5%	€9.60	€3.87
Men's or boys' anoraks	€359.3 m	37.7%	19.9%	€14.34	€2.80
Women's or girls' anoraks	€566.2 m	59.4%	19.3%	€13.95	€0.93

Source: Eurostat 2022

The women's or girls' anoraks category constitutes the bulk of Poland's fashion sportswear imports, accounting for a stable 59.4% share of the market between 2016 and 2021. Both the men's or boys' and women's or girls' anorak categories grew by over 19%, in line with the overall growth rate for fashion sportswear. By contrast, tracksuit imports grew by just 2.9%.

Poland is not currently a suitable market for more value-added or sustainable products. The country has low GDP and wages, and it is behind in terms of sustainability awareness. Poland's share of imports from developing countries is still low (28.5% compared to the European average of 45.6% in 2021), but it is growing fast (20.4% between 2016 and 2021). This means developing country exporters will have many opportunities to increase their exports to Poland in the short and medium term.

China, Myanmar and Bangladesh are the only developing countries that export fashion sportswear to Poland within the top ten (with market shares of 11.1%, 4.8% and 4.7%, respectively). Both Myanmar's and Bangladesh's exports grew during the 2016-2021 period by as much as 95.1% and 92.8% per year on average. This is reflected in the average price paid by Poland for developing country fashion sportswear imports, which is just €8.35 per unit compared to the EU average of €12.20.

The pursuit of an active and healthy lifestyle through sport or exercise is a trend that can mostly be seen in countries with higher levels of economic development. According to the 2022 Eurobarometer survey, only 35% of the Polish population engaged in exercise or played sport, making it the third lowest rate in the EU. However, as the country continues to develop, it is expected that this number will increase.

The main fashion sportswear brands in Poland include 4F, Nago, Carpatree, Joy Fit Crew and This is Commitment.

Tips:

- Check out the websites of your target brands/retailers to identify how they are marketing themselves to the end-consumer in terms of sustainability. This might include certifications, testing requirements, or materials used. Think about how you could add value and adjust your product development and messaging accordingly. Use storytelling where possible.
- Visit the website of Textile Exchange to learn about the opportunities and requirements of the Recycled Content Standard and the Global Recycled Standard.
- Check trade media including Sourcing Journal or Just-style to follow the latest news on market developments, product innovation and sustainability requirements.

4. Which trends offer opportunities or pose threats in the European fashion sportswear market?

The European fashion sportswear market follows the general apparel industry trends and developments related to sustainability, circularity and corporate social responsibility, driven largely by policy initiatives under the EU Green Deal.

The fashion sportswear segment has its own set of sustainability challenges relating to its requirements for performance features and functionality. Petroleum-based synthetic materials, such as nylon, polyester and elastane, are widely used in the sportswear and fashion sportswear segments due to their durability and performance characteristics. They are, however:

- made from non-renewable resources,
- manufactured using an energy-intensive process, and
- not biodegradable.

The manufacturing of water-resistant products may also use finishes or membranes that contain harmful chemicals that impact both the environment and human health.

Alongside increasingly strict legislation, environmental consciousness among sportswear consumers is leading to demand for more sustainable products. As a result, the sustainable sportswear market has strong growth prospects.

Most fashion sportswear brands now have a range of sustainable products. Many have put sustainability at the centre of their brands and products. Companies that operate exclusively or mostly online are some of the most heavily focused on promoting inclusiveness in sports and/or sustainability and use social media to communicate their values.

The use of recycled materials is becoming a basic requirement

The EU Strategy for Sustainable and Circular Textiles aims to ensure that textile products placed on the EU market are 'to a great extent made of recycled fibres' by 2030.

Most sustainability-focused sportswear brands use recycled polyester and recycled nylon in their collections, and many want to stop using virgin polyester and nylon completely. The number of Global Recycled Standard (GRS) and Recycled Content Standard (RCS) certifications increased by 14% and 15% between 2020 and 2022.

Many recycled materials currently come from plastic or nylon waste. According to a 2019 Greenpeace report, a staggering 12 million tonnes of plastic ends up in the ocean every year. The two most common branded yarns made from recycled ocean plastic waste used in the fashion sportswear segment are *REPREVE®* (by Unifi) and *ECONYL®* (by Aquafil).

REPREVE® is a performance fibre made from recycled plastic bottles that have been diverted from landfill and oceans. ECONYL® yarn uses nylon waste from old carpets, fishing nets, marine debris and pre-consumer waste to create regenerated nylon with the same properties and quality as new nylon. Aquafil's 2022 sustainability report reveals that more than 2500 brands are using ECONYL® and sales of ECONYL® increased by 52% in 2022.

Research by the Changing Markets Foundation found that 85% of fashion brands surveyed rely on plastic bottles for recycled polyester. Upcoming EU legislation could, however, restrict the use of recycled plastic bottles for textile production. The European Commission is concerned about brands' claims that their use of recycled polyester makes their products sustainable. When plastic polymers used to make recycled polyester do not come from fibre-to-fibre recycling but from PET bottles instead, these claims can be misleading.

This new legislation will make it more urgent to develop fibre-to-fibre textile recycling and different alternatives to virgin plastics (for example, bio-based polyester).

Strict EU chemicals legislation presents opportunities for compliant suppliers

Various chemicals are used and released during the production, use and disposal of fashion sportswear products. Many of these substances are toxic and can have negative effects on worker safety, human health, wildlife and the environment. Many of these substances have strict allowable limits for finished products and/or reporting requirements under EU legislation:

- EU POP Regulation 2019/1021: This act restricts the use of Persistent Organic Pollutants (POPs), which are substances that persist in the environment, accumulate in living organisms and pose a risk to human health.
- EU REACH Regulation 1907/2006: This is the world's strictest law relating to chemical substances in consumer goods, including textiles.

Until very recently, almost all water-resistant or water-repellent fashion sportswear was made using a finishing treatment containing PFAS (per-and polyfluoroalkyl substances). PFAS is a class of toxic substances that have been linked to serious health problems, including cancer and birth defects. As EU legislation on PFAS is becoming increasingly strict, most sportswear brands are focusing their efforts on phasing out the use of PFAS.

Brands are being held responsible for their use and control of all hazardous chemicals throughout their supply chains. As a result, they are increasing their buyer requirements. Hazardous substances that are not yet legally restricted may be included in the AFIRM restricted substances list (RSL) and the ZDHC manufacturing restricted substances list (MRSL). These are the leading guidance for brands, retailers and suppliers.

Most brands have developed their own Restricted Substances List (RSL) and Manufacturing Restricted Substances Lists (MRSLs), which they distribute to suppliers every year. Non-compliance can have serious consequences and usually leads to the end of the business relationship. On the other hand, suppliers that implement effective chemical management systems will have a competitive advantage.

Circular business models are gaining ground

Fashion sportswear brands are ever more experimenting with circular business models. According to the Ellen MacArthur Foundation, in a circular economy, products and materials are kept in circulation by reusing, refurbishing, remanufacturing or recycling them.

In September 2020, sustainable fashion brand Presca announced their collaboration with Poseidon Plastics and Teeside University on a range of 'fully circular sportswear'. Swiss-based running brand 'On' announced the launch of its subscription-based service for recyclable sportswear. The subscription service, called 'Cyclon', allows subscribers to receive and wear running sportswear and then return end-of-life products to On in exchange for the latest version of the same item.

Customer-focused, digital-first strategies are driving growth

According to a report by consulting company McKinsey, just 17% of Nike's sales in 2012 were directly to consumers. By 2022, this figure rose to 42%, and the company aims to achieve 60% by 2025.
Sportswear brands are key drivers of the trend of healthy, low-impact lifestyles. Social media is a powerful tool

for promoting these values, creating inclusivity and influencing lifestyle choices. Retailers and brands are engaging more with consumers using ‘emotional branding’, storytelling, ambassadors and influencers. Storytelling can be equally important for suppliers. If you align with buyers on sustainability, you can create a competitive advantage.

Brands also use technology to appeal to consumers’ desire for individuality and to create unique experiences. They do this through personalised communication, customisation services and co-creation opportunities. Innovations in technology (e.g. collaborative software, AI, Virtual reality, 3D printing and smart textiles) create more opportunities for co-creation, customisation, personalisation and on-demand manufacturing. To take advantage of these trends, you need shorter supply chains and more localised production.

Tips:

- Add value by improving your product development capabilities. Take responsibility for due diligence (pre-production) testing to ensure compliance with quality, performance and sustainability standards. Create a collection of sustainable fashion sportswear.
- Visit the Performance Days website to access product performance codes. This will give you a good understanding of the possible functional properties and qualities of fabrics, yarns, components and garments.
- Participate in a short ZDHC training programme to gain an understanding and ways of implementing best practices in chemical management. Work towards eliminating the use of chemicals and dyes that are not ZDHC-approved.
- The *AFIRM Restricted Substances List* (RSL) is updated every year on 1 February. It is freely available and downloadable from the AFIRM website. It is currently offered in six languages.
- Subscribe to ECHA (The European Chemicals Agency) to receive updates about changes to REACH and other chemical legislation in the EU.

Frans Tilstra and Giovanni Beatrice for FT Journalistiek carried out this study on behalf of CBI.