The European market potential for dresses and skirts

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The Dresses and Skirts market is worth approximately €10.8 billion in Europe, and it is split between Dresses, which accounts for up to 86% of the value, and Skirts, which covers the remaining 14%. The market is growing at an average rate of 5% each year.

The European Dresses and Skirts market follows the general apparel trends related to sustainability, technological innovation and increased emphasis on corporate and social responsibility. For more information, see the CBI study on Trends in the Apparel market. Aside from these general trends, the Dresses and Skirts market has its own segment-specific trends: changes in the types of Dresses and Skirts and wedding dresses are driving the market.

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1. Product description

Dresses and Skirts are clothing, which is worn predominately by women and girls during the day, at home as well as at work. The category consists of Dresses and Skirts of different fabrics/textiles.

The skirt sub-subsegment includes divided and non-divided skirts knitted and crocheted, of wool or fine animal hair, cotton, synthetic fibers, other textile materials and excluding petticoats (HS Codes: 61045100, 61045200, 61045300, 61045900, 62045100, 62045200, 62045300, 62045910)

The dress sub-segment includes knitted and crocheted dresses, of wool or fine animal hair, cotton, synthetic fibers and other textile materials and excluding petticoats (HS Codes: 61044100, 61044200, 61044300, 61044400, 61044900, 62044100, 62044200, 62044300, 62044400, 62044900).

Figure 1: Examples of Dresses and Skirts

Photo Source: Unsplash

2. What makes Europe an interesting market for Dresses and Skirts?

Europe is one of the more significant importers of Dresses and Skirts in the world. In 2021, the value of Dresses and Skirts imports to Europe accounted for €10.8 billion, up from €8.5 billion in 2016. This corresponded to roughly 1 billion units of Dresses and Skirts clothing in 2021 (down from 1.1 billion in 2016). During the last five years, the value of the European Union's Dresses and Skirts imports has been growing on average by 5% annually. It is expected that in the years to come, the demand for Dresses and Skirts will continue to grow at a similar rate.

The European Union is also a large re-exporter of Dresses and Skirts. In 2021, it exported €8.7 billion worth of Dresses and Skirts apparel (up from € 6.7 billion in 2016). EU Dresses and Skirts exports have been growing at an average yearly rate of 5.2% between 2016 and 2021. The biggest EU exporters in 2021 were Germany (€1.6 billion), Spain (€1.4 billion), Italy (€1.4 billion), Poland (€984 million), the Netherlands (€776 million), and France (€750 million). Together, these six countries represent over 79.2% of the EU's Dresses and Skirts apparel exports. The Netherlands, Poland and Germany have seen the strongest export growth within this group, with an average yearly increase between 11.9% and 16.1%. In comparison, Italy has experienced recent losses of -0.7% annually.

Currently, 45.6% of European Dresses and Skirts imports originate in Extra-EU countries and 54.4% originate in Intra-European Union countries. In 2021, suppliers from developing countries contributed 41.9% to all Dresses and Skirts imports into the European Union in terms of value (down from 45% in 2016) and suppliers from the rest of the world accounted for 3.8% of the import value (down from 7.8% in 2016). The value of European Union Dresses and Skirts imports originating from developing countries corresponded to €4.5 billion in 2021 and has grown at an average yearly rate of 3.4% since 2016. This demonstrates that there is a strong demand for Dresses and Skirts from developing countries.

Europe's extra-EU Dresses and Skirts imports are dominated by China, Turkey and Bangladesh. Together, these three countries account for 27.5% of all Dresses and Skirts imports into the European Union. China is the single largest Dresses and Skirts exporter to the EU with 15.3% of the EU imports value in 2021. It is followed by Turkey with 7.1% and Bangladesh with 5.1%. Other Extra-EU Dresses and Skirts exporters have market shares of less than 5% of the overall Dresses and Skirts import value. Bangladesh (+1.1%) and Myanmar (+0.3%) increased their share of Dresses and Skirts imports over the last five years. Likewise, Bangladesh's imports reached €548 million (in comparison to €333 million in 2016), while the average extra-European Union countries experienced an average annual growth of 1.9% during the same period.

The Intra-European Union Dresses and Skirts trade is dominated by Germany, Poland, and Spain. 31.3% of the total Intra-EU Dresses and Skirts imports originate in these three markets. They are followed by Italy with 5.7%, the Netherlands with 4.1% and France with 3.0%. All countries except Italy and France have increased their market shares over the last 5 years.

Table 1: Top 10 Extra-EU and Intra-EU Dresses and Skirts exporters to the European Union, 2021 EUR value; average yearly growth

Country	Value	5-yr growth
Top Extra-EU Dresses and Skirts Exporters		

China	€1,645 million	↑1.9%
Turkey	€762 million	↑3.8%
Bangladesh	€548 million	↑10.5%
India	€530 million	↑3.2%
Morocco	€416 million	↑4.8%
United Kingdom	€227 million	↓-14.8%
Cambodia	€121 million	↓-1.8%
Tunisia	€80 million	↓-0.8%
Myanmar	€72 million	↑20.5%
Vietnam	€69 million	↓-3.4%
Top Intra-EU Dresses and Skirts Exporters		
Germany	€1,632 million	↑12.6%
Poland	€984 million	↑18.7%
Spain	€765 million	↑9.4%
Italy	€617 million	↑3.1%
The Netherlands	€437 million	↑15.0%
France	€322 million	↑0.6%
Denmark	€257 million	↑9.8%
Belgium	€139 million	↓-7.5%
Sweden	€103 million	↑15.5%
Austria	€91 million	↑6.1%

Source: Eurostat

Impact of COVID-19 on the European apparel market

IN 2020, the COVID-19 pandemic strongly influenced the sales and processes within all segments of the fashion industry. In most European countries, many local shops had to close during lockdowns. Some survived thanks to support from their governments, heavy discounts and a shift to digital sales. Overall, sales in the Dresses and Skirts segment experienced a sales decline in 2020, although it was not as severe as in other apparel segments.

According to industry experts, the pandemic may change all market dynamics in the long run. Asian countries are expected to lose stakes due to local lockdowns and delivery problems, while companies in Africa or other regions could potentially win market share by being a reliable and present partner. Additionally, the pandemic created new trends and demands among consumers. E.g., some Chinese manufacturers have been observed providing buyers with antibacterial and antiviral fabrics.

Further information about the impact of the coronavirus and how to respond have been collected and can be found in CBI's market information about the impact of the Coronavirus.

Brexit created great uncertainty

The United Kingdom left the European Union in 2020. As a result, new trade agreements for all product categories, including apparel, were needed to maintain business partnerships with countries located in the European Union and other partners worldwide.

The value of the UK's apparel imports is right behind Germany's, which would have made it the second-largest market in the European Union had it still been a member. Following Brexit and the accompanying withdrawal from the European Union, the UK has stopped sharing its official trade figures with Eurostat. This makes an exact and official comparison of product segments and product quantities impossible, but the overall approximate import market values are still available from the ITC Trademap.

ITC Trademap figures show that the United Kingdom has deeply felt the consequences of both Brexit and the COVID-19 pandemic. The value of overall apparel imports decreased from €22.2 billion in 2019 to €17.6 billion in 2021 which is an average annual decrease of 11.1% over two years.

At this point, the long-term consequences of Brexit cannot yet be foreseen. However, in 2021, the UK experienced dramatic shortages in supermarkets and workforce. This hampered the country's recovery from the pandemic and could turn out to be part of the long-term consequences of Brexit.

In the meantime, the European Union initiated an EU-UK Trade and Cooperation Agreement. This is intended to facilitate trade between the countries of the Union and the United Kingdom, but cannot fully replace the trade relationship that the UK enjoyed with the EU before Brexit. In 2021, the United Kingdom signed various trade agreements with non-EU countries.

3. Which European countries offer most opportunities for Dresses and Skirts?

Western European markets are much larger and better developed than Central and Eastern European markets in terms of supply chain organisation and quality control. The top Dresses and Skirts import markets in the EU are Germany, France, Spain, Poland, the Netherlands and Italy. These top six countries together account for 72.5% of Dresses and Skirts imports in the EU and have been growing at an average rate of 4.5% per year in the last five years.

Table 2: Top 10 European Union importers of Dresses and Skirts, 2021 EUR value; average yearly growth

Country	Value	5-yr growth

Germany	€2,247 million	↑5.7%
France	€1,413 million	↑0.6%
Spain	€1,344 million	↑2.2%
Poland	€1,059 million	↑20.3%
The Netherlands	€998 million	↑2.4%
Italy	€753 million	↑1.9%
Belgium	€442 million	↑3.2%
Austria	€438 million	↑4.8%
Denmark	€407 million	↑10.6%
Sweden	€310 million	↑4.9%

Source: Eurostat

Table 3: Top 10 European Union importers of Dresses and Skirts from developing countries, 2021 EUR value; average yearly growth

Country	Value of imports from developing countries	5-yr growth	Share of imports from developing countries
Spain	€1,054 million	↑4.3%	19.2%
Germany	€916 million	↑3.2%	16.7%
France	€691 million	↑3.6%	12.6%
Netherlands	€472 million	↓-3.2%	8.6%
Poland	€284 million	↑25.1%	5.2%
Italy	€277 million	↓-2.5%	5.0%
Denmark	€267 million	↑10.3%	4.9%
Sweden	€143 million	↑5.0%	2.6%

Belgium	€132 million	↓-7.6%	2.4%
Ireland	€82 million	↑25.4%	1.5%

Source: Eurostat

Germany

Currently, Germany is the largest import market for Dresses and Skirts in Europe. In 2021, the value of its Dresses and Skirts imports amounted to €2.2 billion (up from €1.7 billion in 2016). This corresponded to approximately 236 million units of clothing. Currently, 41% of Germany's Dresses and Skirts imports originates in the developing countries, 57% in EU27 and 2% in other countries. In the last five years, the value of Germany's Dresses and Skirts imports has grown at an average compound rate of 5.7% per year. During the same time, the value of imports from developing countries has shown an average growth of 3.2%, meaning that the overall share of imports from developing countries has been decreasing.

Dresses constitute 85.5% of the Dresses and Skirts segment (up from 82.2% in 2016). Not only is the dress segment growing quickly, its unit prices are also higher than those of the Skirts segment (€9.73/unit for Dresses vs. €8.35/unit for Skirts). At the same time, the skirts segment was the only one to experience a significant increase in price/unit of €0.65 during the same time period.

Table 4: 2021 imports of Dresses and Skirts to Germany by segment, with 5-year growth, average import unit price and 5-year price evolution

GERMANY	2021 Value (€)	5-year growth	Average unit price	5-year price change
Dresses	€1.9 billion	6.5%	€9.73	↓-€0.26
Skirts	€325 million	1.4%	€8.35	↑€0.65
TOTAL:	€2.2 billion	5.7%	€9.51	↑€0.01

The main Dresses and Skirts brands in Germany include Alife & Kickin, Orsay, Tom Tailor, Ulla Popken, JOOP!, and Rohde.

France

France is the second-largest import market for Dresses and Skirts in Europe. In 2021, the value of its Dresses and Skirts imports amounted to €1.41 billion (up from €1.37 million in 2016). This corresponded to approx. 144 million units of clothing. In the last five years, the value of France's Dresses and Skirts imports has grown at an average rate of 0.6% per year, while the import volume has decreased at a rate of 0.1% per year. During the same time period, the value of imports from developing countries grew by an average 3.6% per year, with Dresses and Skirts from developing countries constituting approximately 49% of France's imports in this product segment. France is currently the second-largest importer of Dresses and Skirts from developing countries, right behind Germany.

Dresses constitute 82.4% of Dresses and Skirts imports in France (up from 81.0% in 2016) and grew on average annually by 0.9% between 2016 and 2021. This is higher than the Skirts segment with a decrease of 0.9%. Dresses unit prices are higher than Skirts unit prices (€10.18/unit for dresses compared to €8.48/unit for skirts).

While the Dresses segment is undergoing a negative price development, the Skirts segment’s price has increased by €1.34 between 2016 to 2021.

Table 5: 2021 imports of Dresses and Skirts to France by segment with 5-year growth, average import unit price and 5-year price evolution

FRANCE	2021 Value (€)	5-year growth	Average unit price	5-year price change
Dresses	€1.2 billion	0.9%	€10.18	↓-€0.17
Skirts	€249 million	-0.9%	€8.48	↑€1.34
TOTAL:	€1.4 billion	0.6%	€9.83	↑€0.30

The main Dresses and Skirts brands in France include NAFNAF, Sézane, Zadig & Voltaire, La Redoute, Sandro, Maje, Rouje and Château Rouge.

Spain

Spain is the third-largest import market for Dresses and Skirts in Europe. In 2021, the value of its Dresses and Skirts imports amounted to €1.3 billion (up from €1.2 billion in 2016). This corresponded to approximately 174 million units of clothing. In the last five years, the value of the Spain’ Dresses and Skirts imports has grown at an average rate of 2.2% per year, while the import volume has grown at 0.8% per year. During the same time frame, the value of imports from developing countries grew at an average of 4.3% per year, showing an accelerating potential for producers from developing countries. Currently, Dresses and Skirts from developing countries constitute 78.4% of Spain’s imports in this product segment.

Dresses constitutes 83.4% of Dresses and Skirts imports in Spain (up from 80.6% in 2016) and grew on average annually at 2.9% between 2016 and 2021. This is higher than the Skirts segment with a decrease of 1%. Unit prices for Dresses are higher than unit prices for Skirts(€8.00/unit for dresses against €6.53/unit for skirts). Both Dresses and Skirts underwent positive price developments between 2016 and 2021, of €0.49 and €0.34 respectively.

Table 6: 2021 imports of Dresses and Skirts to the Spain by segment with 5-year growth, average import unit price and 5-year price evolution

SPAIN	2021 Value (€)	5-year growth	Average unit price	5-year price change
Dresses	€1.1 billion	2.9%	€8.00	€0.49
Skirts	€223 million	-1.0%	€6.53	€0.34
TOTAL:	€1.3 billion	2.2%	€7.72	€0.50

The main Dresses and Skirts brands in Spain include Massimo Dutti, Mango, Zara, Bershka, Stradivarius, and Pull & Bear.

Poland

Poland is the fourth-largest import market for Dresses and Skirts in Europe and has shown the most dynamic growth of any local market in the last five years. In 2021, the value of its Dresses and Skirts imports amounted to €1.1 billion (up from €419 million in 2016). This corresponded to approximately 128 million units of clothing. In the last five years, the value of Poland's Dresses and Skirts imports has grown at an impressive average rate of 20.3% per year, while the import volume has grown at a rate of 19.6% per year. During the same time frame, the value of imports from developing countries has significantly increased on average by 25.1% per year with Dresses and Skirts from developing countries currently constituting over 26.8% of Poland's imports in this product segment.

Dresses constitutes 85.7% of Dresses and Skirts imports in Poland (up from 79.5% in 2016) and grew by an average of 22.2% annually between 2016 and 2021. This is higher than the Skirts segment which showed an increase of 11.9%. Unit prices for dresses are higher than unit prices for skirts (€8.85/unit for dresses against 6.06€/unit for skirts). Both Dresses and Skirts have undergone a weak but positive price development between 2016 and 2021 of €0.04 and €0.01 respectively.

Table 7: 2021 imports of Dresses and Skirts to Belgium by segment with 5-year growth, average import unit price and 5-year price evolution

POLAND	2021 Value (€)	5-year growth	Average unit price	5-year price change
Dresses	€908 million	22.2%	€8.85	€0.04
Skirts	€151 million	11.9%	€6.06	€0.01
TOTAL:	€1.1 billion	20.3%	€8.30	€0.25

The main Dresses and Skirts brands in Poland include Reserved, House, Cropp, Mohito, Risk Made in Warsaw.

The Netherlands

The Netherlands is the fifth-largest import market for Dresses and Skirts in Europe. In 2021, the value of its Dresses and Skirts imports amounted to €998 million (up from €887 million in 2016). This corresponded to approximately 88 million units of clothing. In the last five years, Dutch Dresses and Skirts imports have grown by 2.4% in value and decreased by 8.4% in volume. During the same time period, the value of imports from developing countries decreased by an average of 3.2% per year. Dresses and Skirts from developing countries currently constitute 47.3% of the Netherlands' overall Dresses and Skirts imports.

Dresses constitute 84% of Dresses and Skirts imports in the Netherlands (down from 80% in 2016) and grew by an annual average of 3.3% between 2016 and 2021. This is higher than the Skirts segment which saw a decrease of 1.7% during this time frame. Dresses unit prices are higher than Skirts unit prices (€11.80/unit for dresses against 9.70€/unit for skirts). Both Dresses and Skirts have undergone a weak but positive price development between 2016 and 2021 of €5.19 and €3.44 respectively.

Table 8: 2021 imports of Dresses and Skirts to the Netherlands by segment with 5-year growth, average import unit price and 5-year price evolution

THE NETHERLANDS	2021 Value (€)	5-year growth	Average unit price	5-year price change

Dresses	€835 million	3.3%	€11.80	+€5.19
Skirts	€163 million	-1.7%	€9.70	+€3.44
TOTAL:	€998 million	2.4%	€11.40	+€4.86

The main Dresses and Skirts brands in the Netherlands include C&A, Anna Van Toor, Sandwich, and Fabienne Chapot.

Italy

Italy is the sixth-largest import market for Dresses and Skirts in Europe. In 2021, the value of its Dresses and Skirts imports amounted to €753 million (up from €686 million in 2016). This corresponded to approximately 57 million units of clothing. In the last five years, Italy's Dresses and Skirts imports have grown by 1.9% in value and decreased by 1.7% in volume. During the same time frame, the value of imports from developing countries decreased on average by 2.5% per year. Dresses and Skirts from developing countries currently constitute over 36.8% of Italy's overall Dresses and Skirts imports.

Dresses constitute 84% of Dresses and Skirts imports in Italy (the same as in 2016) and the segment has been growing on average by 1.9% annually. The Skirts segment (16%) experienced the same growth. Dresses unit prices are higher than Skirts unit prices (€14.04/unit for dresses against 10.37€/unit for skirts). Both Dresses and Skirts have undergone a weak but positive price development between 2016 and 2021 of €2.10 and €2.15 respectively.

Table 9: 2021 imports of Dresses and Skirts to Italy by segment with 5-year growth, average import unit price and 5-year price evolution.

ITALY	2021 Value (€)	5-year growth	Average unit price	5-year price change
Dresses	€631 million	1.9%	€14.04	+€2.10
Skirts	€122 million	1.9%	€10.37	+€2.15
TOTAL:	€753 million	1.9%	€13.28	+€2.15

The main Dresses and Skirts brands in Italy include Miss Sixty, Calzedonia, Rinascimento, Solotre, Motivi, and OVS.

Tips:

Focus your efforts on the top import markets for skirts and dresses imports (Germany, France, Spain, Poland, the Netherlands, and Italy), since these are the most relevant importers from developing countries. Spain is a significantly interesting market due to its high openness to imports from developing countries although Germany and France follow relatively closely.

Prove your capabilities to the leading Dresses and Skirts importing countries by visualising the benefits (for example price, quality, and flexibility) of a collaboration. For now, major shares of product segments are imported from other European countries instead of from countries outside of the EU.

Treat the product category as a seasonal business. In Europe, larger amounts of skirts and dresses are sold during the spring and summer season in contrast to autumn and winter.

Visit the websites of the most popular clothing brands, as specific skirts and dresses brands do not exist. Use the websites and popular fashion magazines like the InStyle, Vogue and Elle, as sources of information on current skirts and dresses trends as well as to understand the aesthetic of European trends.

Keep an eye on developments due to Brexit, especially if you are an exporter to the UK. Check how free trade agreements are impacted and whether you will be subject to new tariffs or other procedural export difficulties. Visit the website 'get ready for Brexit' for more information on Brexit and its potential impact on your business.

4. Which trends offer opportunities or pose threats for the European Dresses and Skirts market?

The European Dresses and Skirts market follows the general apparel trends related to sustainability, technological innovation and increased emphasis on corporate and social responsibility. For more information, see the CBI study on Trends in the Apparel market. Aside from these general trends, the Dresses and Skirts market has its own, segment-specific trends:

Change in the types of Dresses and Skirts

In terms of skirts, current trends go towards mini skirt of short length and designs evoking the 60s youthquake. Additionally, pleated skirts of very light synthetic material, skirts with spangles and with elaborated colorful designs are currently highly demanded. In 2019, longer and midi skirts have been more demanded by customers than miniskirts. Further demanded designs are long tube skirts, wrap skirts and skirts with pockets. Modern dress designs do also show more fabric than in the last couple of years; current trends include puff-sleeves, long skirts, ruffles, ribbons, and double-layers. Jersey, crochet, and blouse dresses (with tropical designs) have become increasingly popular. Sports brands like Adidas, Nike and Puma have also started to produce sportive looking dresses in jersey-style and swimwear as well as lingerie brands have started to produce light summer dresses for the beach. The interest for gender lines is also growing "men's skirt" being one of the most-searched fashion items of 2021.

Exporters of Dresses and Skirts can use these trends by offering innovative colors and materials to produce clothing. Locally produced fabrics which ethnic patterns and colors could be interesting by European fashion brands looking for new creative products. Also, niches like the lingerie or sports- or activewear brands could be an interesting opportunity to enter the European markets. Nevertheless, many bigger brands already have a set list of suppliers and entering it is a difficult task.

Design trends underly fast-changing patterns and are relatively difficult to predict. In most cases, seasons' trends and fashion gets developed by fashion designers half a year before the launch of a fashion collection, but the influencers and other social media celebrities have made the business much more dynamic.

Wedding dresses are driving the market

The global market of wedding dresses is estimated at €16.4 billion and shows tendencies to grow at a ratio of nearly 5% until 2026

The average price of wedding dresses in Germany lays between €800-1.000 for customers showing big potential in terms of net profit. Many European labels solely specialize on the sales of wedding dresses and attached accessories, of which many imported dresses have been manufactured in China. Nevertheless, customers have become aware of the imports from China and do prefer to choose dresses manufactured in alternative locations. The digital sales and distribution of wedding dresses is growing significantly at the same time.

Manufacturers of Dresses and Skirts can use their experience to produce wedding clothing by offering fine, hand-made materials and fabrics of different shades of white. However, non-EU dress manufacturers do directly compete with suppliers of known European designer houses who demand a certain quality of fabrics to be able to sell the dresses at a high rate.

Tips:

- Adjust your Dresses and Skirts styles according to the trends, for example, by offering colorful fabrics and elaborated (tropical and flowery) designs. Be brave to offer also alternative materials like spangles, buttons and pearls.
- Be open to collaborate with brands of alternative dress designers of industries like wedding clothing and sportswear, as well as lingerie.
- Since most brands do not specialize on Dresses and Skirts, make use of existing connections in the fashion industry. The chances are high that existing collaboration partners make use of other Dresses and Skirts suppliers in the same time.
- Experiment with Direct-to-Customer sales alongside your Business-to-Business activities. You can sell through your own web shop, existing online platforms or through social media.
- Familiarize yourself with the latest fashion trends on social media by following the fashion influencers and/or leading European fashion players in your product segment. Consult Feedspot for the list of Top 100 European Fashion Bloggers.

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