

The European market potential for men's shirts

Last updated:

30 September 2022

The men's shirts market is worth approximately €5.0 billion in Europe. The market is declining at an average rate of 4.8% each year.

The European men's shirts market follows the general apparel trends related to sustainability, technological innovation and increased emphasis on corporate and social responsibility. For more information, read [the CBI study on trends and in the apparel market](#). In addition to these general trends, the men's shirts market has its own, segment-specific trends.

Contents of this page

1. [Product description](#)
2. [What makes Europe an interesting market for men's shirts?](#)
3. [Which European countries offer most opportunities for men's shirts?](#)
4. [Which trends offer opportunities or pose threats on the European men's shirts market?](#)

1. Product description

In this analysis, the men's shirts segment includes those knitted or crocheted of cotton, synthetic fibres, artificial fibres, wool or fine animal hair, man-made fibres, flax or ramie or other textile materials (HS codes: 61051000 61052010 61052090 61059010 61059090 62051000 62052000 62053000 62059010 62059090).

Figure 1: Examples of men's shirts



Photo source: [Unsplash](#)

2. What makes Europe an interesting market for men's shirts?

Europe is one of the more significant importers of men's shirts in the world. In 2021, the value of men's shirts imports to Europe accounted for €5.0 billion, down from €6.3 billion in 2016. This corresponded to roughly 614 million units of men's shirts in 2021 (down from 881 million in 2016). Between 2016 and 2021, the value of Europe's imports of men's shirts declined by an average compound annual rate of 4.8% (2020). This decline was caused by the COVID-19 pandemic and Europe-wide lockdowns, which resulted in working-from-home arrangements for large parts of the workforce in 2020 and 2021. It is expected that the demand for men's shirts will return to its 2016–2018 levels of approximately €6.3 billion in the years to come.

Europe is also a large re-exporter of men's shirts. In 2021, it exported €3.8 billion worth of men's shirts (down

from €4.2 billion in 2016). EU exports of men's shirts declined at an average annual rate of 2% between 2016 and 2021. The biggest EU exporters in 2021 were Germany (€0.8 billion), Italy (€0.7 billion), the Netherlands (€0.5 billion), Spain (€0.3 billion), France (€0.3 billion) and Portugal (€0.2 billion). Together, these six countries represent over 74.5% of the EU's men's shirt exports. The Netherlands and Germany have seen the strongest export growth within this group, with an average yearly increase between 0.4% and 2.2%. Poland grew by on average 11.8% per year during the same time period. By comparison, France, Italy and Spain experienced average declines between 1.8% and 9.2% annually.

In 2021, 50.3% of European imports of men's shirts originated in countries outside the EU and 49.7% originated in countries within the EU. In 2021, suppliers from developing countries contributed 48.3% to all men's shirt imports into Europe in terms of value (down from 54.8% in 2016) and suppliers from the rest of the world accounted for 2.0% of the import value (down from 4.5% in 2016). The value of European men's shirt imports originating from developing countries corresponded to €2.4 billion in 2021 and has decreased at an average annual rate of 7.1% since 2016.

Europe's imports of men's shirts from outside the EU are dominated by Bangladesh, China and Turkey. Together, these three countries account for 30.4% of all imports of men's shirts into Europe. Bangladesh is the single largest exporter of men's shirts to the EU with 16.5% of the EU import value in 2021. It is followed by China with 7.2% and Turkey with 6.7%. Other exporters of men's shirts from outside the EU have market shares of less than 5% of the overall import value. The United Kingdom (-26.3%), North Macedonia (-10.9%), Tunisia (-9.6%) and China (-9.3%) have shown significant declines between 2016 and 2021.

The intra-EU men's shirts trade is dominated by Germany, Italy and the Netherlands. 24.8% of the total imports of men's shirts from within the EU originates in these three markets. They are followed by Spain with 4.6% of the market share, Poland with 4.1% and France with 3.9%. All these countries increased their shares during the last five years.

Table 1: Top 10 exporters of men's shirts to Europe from within and outside the EU, 2021 EUR value, average yearly growth

Country	Value	Five-year growth
Top exporters of men's shirts from outside the EU		
Bangladesh	€819 million	↓ -6.3%
China	€357 million	↓ -9.3%
Turkey	€333 million	↓ -6.4%
India	€218 million	↓ -8.6%
Vietnam	€154 million	↓ -6.5%
Morocco	€79 million	↓ -1.1%

Myanmar	€60 million	↓ -3.4%
Tunisia	€55 million	↓ -9.6%
United Kingdom	€42 million	↓ -26.3%
North Macedonia	€42 million	↓ -10.9%
Top exporters of men's shirts from within the EU		
Germany	€639 million	↑ 1.9%
Italy	€301 million	↓ -0.3%
The Netherlands	€288 million	↑ 0.2%
Spain	€231 million	↓ -1.9%
Poland	€204 million	↑ 18.0%
France	€192 million	↑ 0.3%
Belgium	€115 million	↓ -10.3%
Denmark	€92 million	↓ -0.4%
Portugal	€77 million	↓ -10.2%
Romania	€71 million	↓ -9.7%

Source: [Eurostat](#)

Impact of COVID-19 on the European apparel market

In 2020, the COVID-19 pandemic strongly influenced 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, a mix of heavy discounts and a shift to digital sales. Overall, sales of men's shirts experienced a 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 lock-downs 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. For example, 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 has been collected and can be found in the CBI [market information report about the impact of the coronavirus](#).

Brexit created great uncertainty

In 2020, the United Kingdom left the European Union. 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 make it the second largest market in the European Union if it was still a member of the Union. Following Brexit and the accompanying withdrawal from the European Union, the UK no longer shares 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 ITC Trade Map.

ITC Trade Map 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, the country experienced dramatic [supermarket](#) and [workforce](#) shortages in 2021. These hampered the country's recovery from the pandemic and could turn out to be some of the long-term consequences of Brexit.

In the meantime, the European Union has initiated an [EU-UK Trade and Cooperation Agreement](#). This is intended to facilitate trade between the EU Member States 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 men's shirts?

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 import markets for men's shirts in the EU are Germany, France, Italy, the Netherlands, Spain and Poland. These top six countries together account for 72.9% of men's shirt imports in the EU, which declined at an average rate of 5.2% per year between 2016 and 2021.

Table 2: Top 10 European importers of men's shirts, 2021 EUR value, average annual growth

Country	Value	Five-year growth
Germany	€1.132 billion	↓ -4.9%
France	€716 million	↓ -5.4%
Italy	€546 million	↓ -6.1%
The Netherlands	€504 million	↓ -2.6%
Spain	€494 million	↓ -10.0%
Poland	€227 million	↑ 4.7%

Belgium	€215 million	↓ -6.9%
Austria	€191 million	↓ -2.6%
Denmark	€164 million	↓ -0.3%
Sweden	€158 million	↓ -4.4%

Source: Eurostat

Table 3: Top 10 European importers of men's shirts from developing countries, 2021 EUR value, average annual growth

Country	Value of imports from developing countries	Five-year growth	Share of imports from developing countries
Germany	€678 million	↓ -7.2%	28.3%
France	€346 million	↓ -5.8%	14.4%
Spain	€312 million	↓ -10.5%	13.0%
Italy	€299 million	↓ -9.6%	12.5%
The Netherlands	€266 million	↓ -7.1%	11.1%
Denmark	€98 million	↓ -1.4%	4.1%
Belgium	€96 million	↓ -11.7%	4.0%
Poland	€77 million	↑ 6.5%	3.2%
Sweden	€60 million	↓ -5.8%	2.5%
Ireland	€40 million	↑ 5.9%	1.7%

Source: Eurostat

Germany

Germany is the largest import market for men's shirts in Europe. In 2021, the value of its men's shirt imports amounted to €1.1 billion (down from €1.5 billion in 2016). This corresponded to approx. 141 million units of men's shirts. Between 2016 and 2021, the value of Germany's men's shirt imports declined at an average rate of 4.9% per year, while the import volume declined by 6.4% per year. During the same time period, the value of imports from developing countries declined on average by 7.2% per year. Men's shirts originating from developing countries currently constitute over 59.9% of Germany's imports in this product segment. The

average unit price of imported men's shirts is €8.04, which is €0.69 higher than in 2016.

The main German men's shirt brands include [Adidas](#), [Puma](#), [A Kind of Guise](#), [Jil Sander](#), [Acronym](#) and [Hugo Boss](#).

France

France is the second largest import market for men's shirts in Europe. In 2021, the value of its men's shirts imports amounted to €716 million (down from €947 million in 2016). This corresponded to approximately 84 million units of men's shirts. Between 2016 and 2021, the value of France's men's shirt imports declined at an average rate of 5.4% per year, while the import volume declined by 7.1% per year. During the same time period, the value of imports from developing countries declined on average by 5.8% per year. Men's shirts originating from developing countries currently constitute over 48.3% of France's imports in this product segment. The average unit price of imported men's shirts is €8.56, which is €0.73 higher than in 2016. The main men's shirt brands include [Lacoste](#), [Maison Kitsune](#), [AMI](#), [Saint Laurent](#), [Husbands](#), [Armor Lux](#), [Maison Labiche](#), [The Kooples](#), [Officine Generale](#), [Sandro](#), [Vilebrequin](#), [Arpenteur](#), [Louis Vuitton](#), [A.P.C](#) and [Vetra](#).

Italy

Italy is the third largest import market for men's shirts in Europe. In 2021, the value of its men's shirt imports amounted to €546 million (down from €747 million in 2016). This corresponded to approximately 67 million units of men's shirts. Between 2016 and 2021, the value of Italy's men's shirt imports declined at an average rate of 6.1% per year, while the import volume declined by 8.4% per year. During the same time period, the value of imports from developing countries declined on average by 9.6% per year. Men's shirts originating from developing countries currently constitute over 54.7% of Italy's imports in this product segment. The average unit price of imported men's shirts is €8.19, which is €0.98 higher than in 2016. The most popular men's shirt brand include [Ermenegildo Zegna](#), [Gucci](#), [Canali](#), [Luca Faloni](#), [Stone Island](#), [Brunello Cucinelli](#), [Giorgio Armani](#), [Prada](#), [Boblioli](#), [Brioni](#), [Stefano Ricci](#), [Bottega Veneta](#), [Loro Piana](#), [Missoni](#), [C.P. Company](#), [Aspesi](#), [Fila](#) and [Barena](#).

The Netherlands

The Netherlands is the fourth largest import market for men's shirts in Europe. In 2021, the value of its men's shirt imports amounted to €504 million (down from €573 million in 2016). This corresponded to approximately 55 million units of men's shirts. Between 2016 and 2021, the value of the Netherlands' men's shirt imports declined at an average rate of 2.6% per year, while the import volume declined by 8.7% per year. During the same time period, the value of imports from developing countries declined on average by 7.1% per year. Men's shirts originating from developing countries currently constitute over 52.7% of the Netherlands' imports in this product segment. The average unit price of imported men's shirts is €9.20, which is €2.54 higher than in 2016. The most popular men's shirt brands include [Suitsupply](#), [Scotch & Soda](#), [Daily paper](#), [Denham](#) and [G-Star raw](#).

Spain

Spain is the fifth largest import market for men's shirts in Europe. In 2010, the value of its men's shirt imports amounted to €494 million (down from €834 million in 2016). This corresponded to approximately 75 million units of men's shirts. Between 2016 and 2021, the value of Spain' men's shirt imports declined at an average rate of 10% per year, while the import volume declined by 10.8% per year. During the same time period, the value of imports from developing countries declined on average by 10.5% per year. Men's shirts originating from developing countries currently constitute over 63.3% of the Spain's imports in this product segment. The average unit price of imported men's shirts is €6.60, which is €0.31 higher than in 2016. The most popular men's shirt brands include [Loewe](#), [Comovita](#), [Balenciaga](#), [Massimo Dutti](#), [Man 1924](#) and [Zara](#).

Poland

Poland is the sixth largest import market for men's shirts in Europe. In 2021, the value of its men's shirt imports amounted to €227 million (up from €180 million in 2016). This corresponded to approximately 34 million units of men's shirts. Between 2016 and 2021, the value of Poland's men's shirt imports grew at an average rate of 4.7% per year, while the import volume grew by 3.6% per year. During the same time period, the value of

imports from developing countries increased on average by 6.5% per year. Men's shirts originating from developing countries currently constitute over 33.9% of Poland's imports in this product segment. The average unit price of imported men's shirts is €6.68, which is €0.35 higher than in 2016. The most popular men's shirt brands include [Kastor](#), [Lanieri fashion](#) and [Vizard](#).

Tips:

Focus your export efforts on the top six markets: Germany, France, Italy, the Netherlands, Spain and Poland. They are both the biggest consumers of men's shirts in Europe and among the top 10 importers of men's shirts from developing countries. All of these countries have a high acceptance of suppliers from outside the EU. The Netherlands and France may be particularly interesting due to the highest average import prices and a positive price evolution between 2016 and 2021.

Visit the websites of the most popular men's shirt brands in Europe, such as [Adidas](#), [Lacoste](#), [Gucci](#), [Scotch & Soda](#) or [Loewe](#), to understand the aesthetic of the European market.

Consider exporting to Poland, as it is currently Europe's fastest growing importer of men's shirts and apparel from developing countries.

4. Which trends offer opportunities or pose threats on the European men's shirts market?

The European market for men's shirts follows the general apparel trends related to sustainability, technological innovation and increased emphasis on corporate and social responsibility. For more information, read the [CBI study on trends in the apparel market](#). In addition to these general trends, the market for men's shirts has its own, segment-specific trends:

Higher-quality fabrics for ready-made shirts

Ready-made shirts are now more important than tailored garments, which used to be adapted to the men's shirts industry. [The type of fabric has a key role not only in the production process](#), but also in the selection and buying choices. The fabrics are of a higher quality and therefore command a higher price. They have also been adapted to ongoing fashion trends. Fabrics are available in different colours, patterns and textures, which offer different impressions while wearing. In order to produce higher-quality shirts, manufacturers are also using more advanced equipment.

More casual wear for less formal workplaces

[Workplaces are changing their habits and allowing employees to wear more casual clothes. This has pushed manufacturers to follow this trend](#). Therefore, casual shirts have become more than just a shirt. In parallel, there is a bigger focus on the level of comfort of the finished garment. Most casual shirts are made of cotton, although polyester, viscose, lycra, modal, Tencel, lyocell and polynosic are also used.

Growing interest in sustainable fibres

Synthetic fibres have an adverse effect on the environment and on consumers due to production techniques and chemical treatments. [Organic natural fabrics such as organic cotton, hemp or linen as well as recycled materials with global recycle standard certifications offer an alternative](#). Some European brands focus on offering eco-friendly men's shirts, e.g. [Unrecorded](#) in the Netherlands, [Arthur & Henry](#) in the UK and [Náz](#) in Portugal. Some of these brands follow codes of labour practice that their suppliers also follow, such as the [Ethical Trading Initiative](#) (ETIC) base code and GOTS certified organic cotton. Some brands, such as Italy's [Opera Campi](#), also choose to source raw materials locally.

Tips:

Experiment with direct-to-consumer sales alongside your business-to-business activities. You can sell through your own web shop, existing online platforms or social media. With prices in Europe increasing due to material shortages, you can be competitive based on a lower price offering and high quality.

Try to enter the sustainable men's shirts segment by adopting specific labels or certifications such as the [Ethical Trading Initiative](#) (ETIC) base code.

This study was carried out on behalf of CBI by [M-Brain GmbH](#).

Please review our [market information disclaimer](#).